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The Importance of Onboarding AND Offboarding

Effectively onboarding new employees, leaders and directors has an enormous impact on their perception of your organization and their ability to quickly contribute value. At the other end of their relationship with your organization, a strong offboarding process transfers institutional knowledge and creates advocates in the community.

Welcoming and Farewelling Employees

“An organized onboarding plan supports your new employee’s confidence in their role and in their decision to join your team,” says Lisa Cavanaugh, Vice President of Leadership Development Experiences for FCCS. “First impressions last, so you want the employee’s initial experience to be positive. Presenting them with a structured welcome clearly designed to set them up for success will lay a strong foundation for an engaged employee.”

There are both logistical and emotional aspects to effective onboarding, made more difficult by a remote or hybrid officing approach. Logistically, on the employee’s first day, have ready for them:

- Technology: security badge, laptop, phone, access to and training on accounting systems and other essential programs
- Space: desk, chair and basic supplies, for both home and office as needed to support a hybrid work environment
- Payroll and benefits forms and supporting information
- Other documentation and forms: NDA, conflict of interest disclosure
- Welcome kit or gift

On the more emotional side of your welcome:

- Communicate to the team and broader staff about the new employee, and deliver a welcome from leadership, whether written, recorded or in-person.
- Ask the receptionist to welcome the new employee by name the first time they come to the office.
- Assign a “buddy” from your team to help show the new employee the ropes including a facility tour and insight on everything from where to have lunch to the team’s meeting protocol.
- The manager should have an initial welcome meeting to provide a contextual introduction to the team, organization and customers, establish expectations and discuss the near-term schedule. That schedule should include lunch with different team members for the first two weeks, along with other informational meetings with key colleagues throughout the organization.
- Prepare a first task or project for the employee to begin.

"A new employee, especially from outside the company, literally has nothing to do until you give them training and resources," says Jeannie Clinkenbeard, Director and Senior Consultant, FCCS' Accelerate Center. "They show up with experience and knowledge, but they can't contribute until you give them the tools and the direction."

During the orientation period – typically 90 days – the manager and HR should continue to check in with the employee to identify and resolve any frustrations or roadblocks to their success.

Culture is an enormous factor for any company and every employee. Every member of the team should help the new employee acclimate to the culture, while respecting and welcoming the different perspectives and ideas the new employee brings. Include the new employee in company activities and events and introduce them to any internal communications platforms like Workspace or an intranet or employee groups or teams. Some organizations use an assessment tool like DISC for Intact Teams to help foster communication and understanding among team members.

When it comes time for an employee to leave your organization, regardless of the reason, an offboarding plan will guide the process, protecting the organization and ensuring the employee is treated with respect.

Knowledge transfer is one key purpose of an offboarding process, possible whenever notice of departure is provided. The departing employee should be asked to summarize their projects, key deadlines and collaborators, and transfer active coordination, even temporarily until a replacement is hired. They should outline their job functions – some of which may not be captured in a job description – and if time allows, provide an overview of any major, recurring projects that happen other times of the year. And, of course, on their final day the logistical aspects that started their employment should be revisited: termination documentation completed, equipment turned in and system access turned off.

Throughout the transition time, the manager and team should find ways to express their appreciation for the employee's contributions. Continue to include them as much as feasible in ongoing meetings and social events and respect their thoughts – their brains haven't turned off just because their life is taking them in a new direction.

"You want to make sure that the departing employee stays engaged so they don't negatively impact morale and team effectiveness," says Jean Cantey Segal, FCCS Chief Learning Officer. "Employees talk about their experiences, and you want those who are leaving to still be positive contributors, and possibly even refer skilled candidates or perhaps return themselves in the future."

An exit interview is always a good idea, giving the employee a chance to share their thoughts and experiences, and providing an opportunity for constructive feedback to the organization. Many teams also celebrate the occasion with a going away event in the days before or after the employee's last workday, building warmth and strengthening bonds.

"You can be sad or disappointed that someone's leaving, and still be happy for them and their next opportunity," says Lisa. "Take a moment to congratulate them

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— JAY LUX
VICE PRESIDENT OF
ORGANIZATIONAL
DEVELOPMENT, FCCS

on whatever their next step is. It doesn't cost anything, but the individual and the colleagues around them will notice and appreciate the positive support."

Empowering New Executive Leaders

Onboarding executive leaders is as important as onboarding employees and includes some of the same practices: documentation should be filled out, computers and phones provided, and system access granted. They should be given a tour of the building, have lunches scheduled for the first few days and know how to access any resources they may need.

The difference is that executives, simply by virtue of being leaders, will manage a large part of their own onboarding rather than wanting to follow an itinerary of pre-scheduled meetings. Instead, schedule loose times for one-on-ones with direct reports, and provide the new executive with a list of recommended people for them to talk to across different business units, and including members of the board of directors, key customers and strategic partners. It's also a best practice to announce leadership changes to employees and the public, so involve the new executive in the communications plan to announce their new role. And if relocation is involved, find a thoughtful way to welcome the new leader's spouse.

"Much of onboarding is about building an emotional connection, and this starts even before the first day," says Jay Lux, FCCS's Vice President of Organizational Development.

The key benefit of having an onboarding plan in place is demonstrating to the new executive that they're joining an organized team, with systems and structure in place. As with onboarding other employees, making sure the executive feels welcome and set up for success is important to lay the foundation for long-term employment.

"One study found that among those voluntarily leaving their job, 90% made the decision in the first 90 days," says Jay. "If you don't take good care of people up front, they may decide to leave early on, but then wait for months, remaining a disgruntled member of your team."

When it's time for an executive to leave, it's important to treat them with dignity and respect, regardless of the reason. Thank them for their time and contributions and take what steps you can to ease their transition, such as with a severance package. Behaving with kindness and courtesy can go a long way to preventing negative comments made about your company – a departing executive could instead remain an advocate if treated appropriately.

Focus on gathering and cataloging the executive's institutional knowledge, being respectful of all the value they bring. Ideally, you'll be able to hire their replacement soon enough to allow a month or so of overlap to help show the new leader the ropes. Be very clear about roles and accountability during the transition period.

"A longer overlap, especially at the CEO level, can lead to confusion about who's making key decisions," says Jay.

Educating and Coaching New Directors

Directors, too, are well-served by a structured onboarding plan to help them acclimate to their new role and the expectations it carries. If they've never served on a board before, they may need education into governance practices and responsibilities. Even those who have previously served as directors should receive substantive information about the organization, including its business challenges and opportunities, so they can perform their role as a director.

"Often, we assume that someone who's made it to become a director know what the role entails, but this isn't always the case despite how experienced and accomplished they may be in their own businesses," says Leslie Hilton, FCCS' Vice President of Governance/Board Development. "Every new director should receive a review of their fiduciary responsibilities, as well as education into the workings of the organization and the board itself."

Many organizations have new directors sit with senior managers to understand more about the business from different perspectives, such as learning from the general counsel the fiduciary role of the director, from the CFO the financial aspects, the CEO to understand the organization's strategy and key objectives, maybe the heads of business units or service lines to learn more about business operations.

As with an employee team, the board of directors has a culture that needs to be conveyed to a new director, while respecting and leveraging the diversity of perspectives and ideas a new director brings. It's every director's responsibility to welcome and include a new director, but an increasing number of boards are establishing mentoring relationships between their new directors and other, more seasoned directors who understand the board's culture and how it operates and can offer insight into things like board dynamics and management team relationships. The board, chair, too, should check in with a new director after the first few board meetings to answer any questions or offer support and advice.

"Many new directors feel they don't know enough to say anything at first, and some will wait a year or sometimes more to participate in board discussions at an optimal level," says Leslie. "A mentor can help encourage their confidence in asking questions and making contributions early in their tenure, and the other nuances of the boardroom."

Offboarding directors is less critical, perhaps, than employees or executives. The most common reasons for departure from cooperative boards are age and term limits, loss of an election or personal decision – regardless, it's still imperative that departing board members be treated with respect and appreciation for their contributions.

"Whenever you have director leaving the board, you hope they're leaving with a positive feeling about the board and their service," says Jean. "It's worth a conversation between the board chair and the departing director to discuss their experience, and how the director can continue serving the success of the cooperative as they advocate in the community, making connections with potential customers."

Beginning and ending relationships with employees, executives and directors are opportunities to establish and strengthen positive relationships. Structured onboarding and offboarding plans help plan and manage these processes effectively, so you get the most value from your people throughout their relationship with your organization.

For more information:

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- About executive search, onboarding and coaching, contact [Jay Lux](#) at 651.982.4568.
- About governance training and development, contact [Leslie Hilton](#) at 720.951.2999.