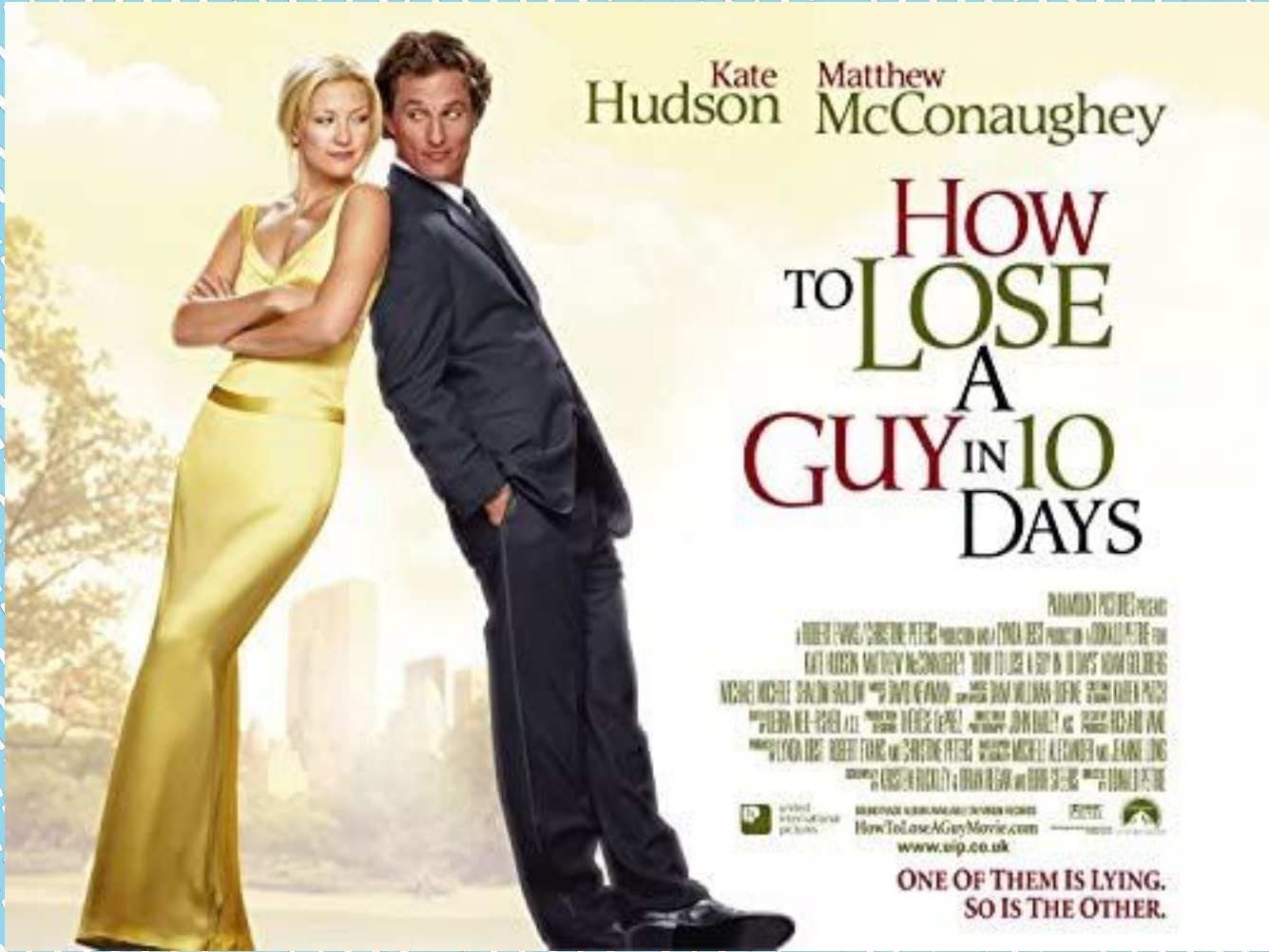




How To Lose an Employee in 10 Days

Employee Onboarding &
Offboarding Strategies





Kate Hudson Matthew McConaughey

HOW TO LOSE A GUY IN 10 DAYS

PARAMOUNT PICTURES PRESENTS
A ROBERT FARNSWORTH / CHRISTINE PETTICCI PRODUCTION AND LYNDIA BEST PRODUCTION A DONALD PETRIE FILM
KATE HUDSON MATTHEW MCCONAUGHEY "HOW TO LOSE A GUY IN 10 DAYS" KIMBERLY WOODS
MICHELLE YEOHUI SETH GREEN AND DAVID HEAVENLY COSTARS JESSICA WILLIAMS DENISE DI NOVI KAREN PRYOR
"POWER RANKED" KYLE CHANDLER "DRESS TO IMPRESS" ANDREW J. COOPER "GUY" JON BUCKLEY AND "POWER RANKED" PAUL
"LYNDIA BEST" ROBERT FRANK AND CHRISTINE PETTICCI MUSIC BY MICHELLE ALEXANDER AND JENNIFER LIND
EDITED BY KRISTIN BUCKLEY A DONALD PETRIE FILM AND JOHN STUBBS COSTUME DESIGNER DONALD PETRIE

United International Pictures
HOW TO LOSE A GUY IN 10 DAYS
HowToLoseAGuyMovie.com
www.uip.co.uk

ONE OF THEM IS LYING.
SO IS THE OTHER.

Hello!

Hilary Cordova
Director of Finance
CESA 9

hcordova@cesa9.org





**ONLY ONE THING IS
BETTER THAN A WINGMAN**

A WINGWOMAN

A strong onboarding
program can
improve retention
by 82%.

ONLY 12%

OF EMPLOYEES FEEL THEIR

COMPANY DID A GREAT

JOB WITH ONBOARDING.**

ONLY 29%

OF NEW HIRES FELT


PREPARED & SUPPORTED

TO EXCEL IN THEIR ROLE.**

Clearly, organizations need to be doing more to **optimize the onboarding experience for new employees.**

A better onboarding experience is linked to increased employee engagement, enabling you to **retain top talent** while **driving performance.**


[Source](#)



theQuotes.me
#Apollo13

**Houston,
we have
a problem.**

- Jim Lovell

A close-up photograph of Tom Hanks as Gene Kranz from the movie 'The Apollo 13'. He is looking slightly to the right with a serious expression. The background is dark and out of focus.

theQuotes.me
#Apollo13

**Houston,
we have**

**AN
OPPORTUNITY!**

What is onboarding?

Onboarding is the initial process of orienting new employees and training them to become contributing members of the team. In addition to equipping new hires with the knowledge and tools they need to be successful in their new roles, onboarding should also help new employees become fully engaged and culturally acclimated, which means fostering the relationship with your new hires and proving the company's dedication to investing in their professional growth.

Activity

- Think back to your first day on the job...
 - How nervous were you?
 - What were you worried about?



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Do Not
Welcome



Make Employees Feel Welcome

- Set the tone - *We're happy you're here!, Welcome to the team!*
- Send a confirmation email before their first day - *help them set the little worries aside*
- Tell them what to expect - provide a schedule for the day if possible
- Make sure someone is there to greet them
- Show them around the building; introduce them to other staff members
- Do whatever you can to help them feel welcome - *little touches*
- Pre-hire activities - email log in, for example

Hello Larissa,

Again, welcome to CESA 9. We're thrilled to have you on the team!

On your first day, Monday, January 25th, please plan to be at the CESA 9 office for orientation. We'll start at 8:00am and finish up for the day around 3:30pm.

Here are a few things you should know before you get here on Monday, January 25th at 8:00am:

- You can park in the front of the building and come in the front door. After day 1, when you come to the office you'll want to park off to the side or in the back of the building. We leave the parking spaces in the front for guests.
- Bring two forms of identification and your banking information for your payroll paperwork.
- You'll need social security numbers for yourself, your spouse, and any dependents that will be on the health and dental plans.
- We'll be taking your photo so bring your smile :)
- There's no need to bring your own lunch because your supervisor will be taking you out for lunch.
- When you arrive on Monday you'll be greeted at the reception area by our receptionist, Jean or Jen, who will show you to my office. We have a full day of orientation activities to help you get acquainted with CESA 9, get you enrolled in benefits, logged into systems, etc.
- Here's the schedule for the day:

25	JAN, MON	● 8 – 9am	ORIENTATION OVERVIEW (LARISSA & HILARY)
		● 9:15 – 9:45am	BUILDING & LOGISTICS MEETING (LARISSA & JEAN)
		● 10 – 10:45am	SUPPLY SIDE MEETING (DAWN & LARISSA)
		● 11am – 12pm	MODULE TIME
		● 12 – 1pm	LUNCH/BREAK
		● 1 – 2pm	MODULE TIME
		● 2 – 3:30pm	HR MEETING & GOOGLE TRAINING (LARISSA & HILARY)

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Have An
Unorganized
Onboarding
Process



Have a Plan - Be Organized

- Checklists for everyone involved in pre-hire and post-hire, including the new employee
 - Ensures everything is covered
 - Ensures consistency
- Helps them build confidence in the organization
- Don't have a plan yet? Do some process mapping



Employee
Orientation
Guide

[Link to Example](#)

Orientation Overview

The Orientation Overview provides a schedule and a checklist of orientation tasks and meetings to be completed. Agendas for the face-to-face meetings are included in the subsequent pages of this Orientation Guide. Day 1 meetings have been scheduled for you. The remaining orientation tasks and events are left for you to schedule and complete as they fit into your schedule.

Day 1 Orientation Activities			
		Scheduled	Completed
Onboarding Overview Meeting	30 Minutes	Start: 8:00 a.m. Hilary's Office	
Building & Logistics Meeting	30 Minutes		
Online Module: Getting to Know CESA 9	Est. 30 Minutes		
Online Module: Building & Logistics	Est. 30 Minutes		
Online Module: Employee Resources & Policies	Est. 30 Minutes		
Online Module: Scheduling & Time Off	Est. 30 Minutes		
Online Module: Payroll & Human Resources - Part 1 & Part 2 <i>Please print and complete the payroll forms for your next meeting.</i>	Est. 30 Minutes		
Supervisor Meeting	Est. 1.5 Hours		
Payroll & Human Resources Meeting	1.5 Hours		

Orientation Activities To Be Completed Within the First 30 Days of Employment

Note: It is the responsibility of the new employee to reach out to schedule these meetings with the contact person listed on the meeting agenda. Meetings requests can be sent via email and the meeting format can be face-to-face or Zoom.

		Scheduled	Completed
Online Module: Working at CESA 9	Est. 15 Minutes		
Online Module: Finance & Operations	Est. 15 Minutes		
Online Module: Skyward	Est. 30 Minutes		
Skyward Meeting*	45 Minutes		
Administrative Meeting*	45 Minutes		
Online Module: Technology & Equipment	Est. 15 Minutes		

Orientation Activities Only Applicable to Some New Staff

Note: Activities that you are required to complete are indicated below.

			Scheduled	Completed
Required <input type="checkbox"/> No <input type="checkbox"/>	Event Facilitation Meeting	45 Minutes		
Required <input type="checkbox"/> No <input type="checkbox"/>	P-Card Meeting	30 Minutes		
Required <input type="checkbox"/> No <input type="checkbox"/>	Online Module: P-Card	Est. 20 Minutes		

Orientation Meeting Agenda: Supervisor Meeting (Day 1)

Facilitator: Al Betry, Agency Administrator (abetry@cesa9.org, ext. 1490)

Location: Al's Office

1. Get to Know You
2. Schedule
3. Communication
4. Calendar
5. Get to Know the Work
 - a. Review Job Description
 - b. Work Assignments
 - c. Review Department/Team
 - d. Resources & Contacts
6. Mentor
7. Regular Meetings
8. Expectations
9. Feedback
10. Policy
11. Schedule Check-Ins
12. Questions

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Give Them a
Big 'Ol Binder



Manage the Flow of Information



- Consider the format and timing for when information is shared
 - Don't expect to cover everything on day 1
- Consider different formats for sharing the information
 - Meet in person for the most important stuff and where the most questions come up
 - Have other people meet with new employees
 - Homework - Things to Read
 - Zooms for "when the time comes" type of things
 - Use the software for the easy stuff
- Take time to fill out paperwork together where people often get stuck or you get the most questions
- Leave less important stuff for later



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Never Follow
Up





Check Ins & Follow Ups

- 30-60-90 Day Check-ins
 - Supervisor
 - Admin
 - HR/Finance
- Reminders
 - “Homework”/To Do List
- Give Feedback

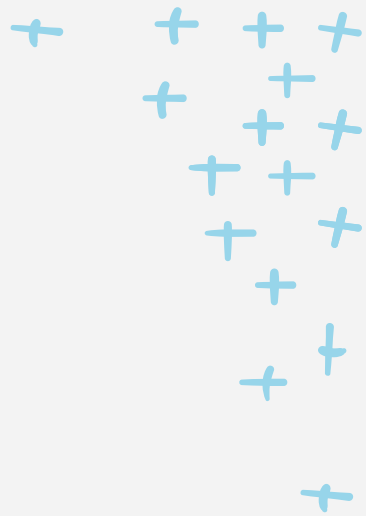
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Lack Good
Resources



Good Resources

- Website
- Handbook/Policy
- Instructions
- People





Skyward

Professional Learning

Employee Handbook

Payroll & Benefits

- Benefits
- Calendars
- Notices
- Paid Time Off (PTO)
- Payroll

Policy & Procedures

- Crisis Plan
- Culture Playbook
- Deadlines (Expenses, Calendars, Credit Cards, Time Sheets)
- Injury Protocol
- Notices
- Policy
- Purchasing & P-Cards

Resources

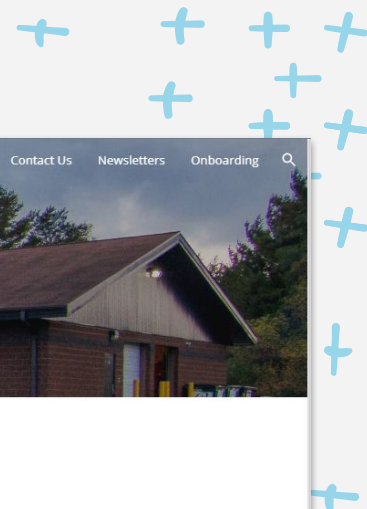
- Building Alarm System
- CESA 9 Alphabet Soup (Acronyms)
- Collated Calendars
- Director Resources
- Google Drive Mapping
- Incident Weather Closing
- Incident Weather Event Cancellations

Tech Support

- Conference Rooms
- RMM
- Phone System
- Printing
- Tech Tips (Google, Zoom, Swiv)
- Website Login

Contact Us

Newsletter



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Make Things
Hard to Find



Make Things Easy to Find

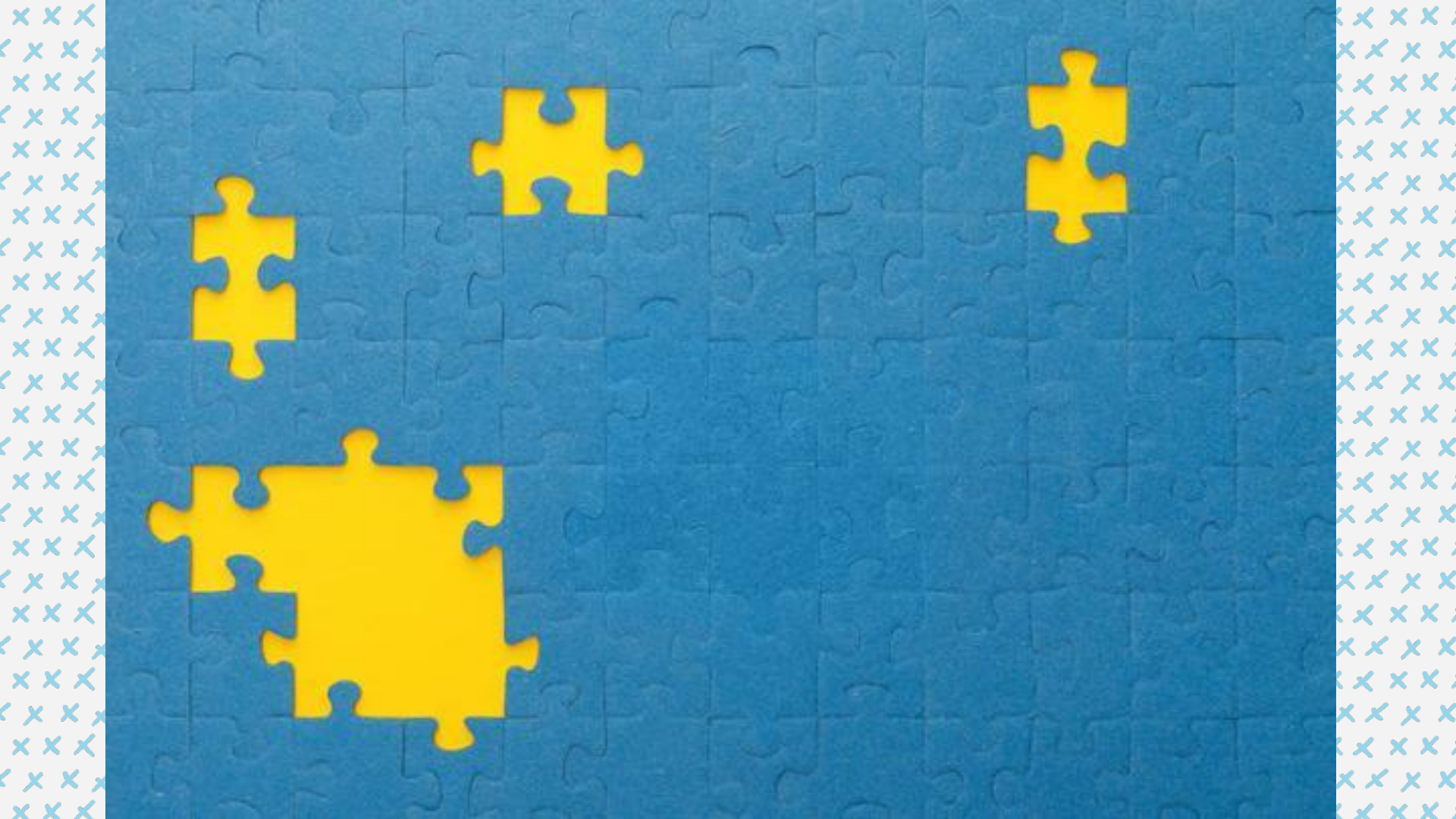
- Organized
- Accessible
- A one-stop shop
- Handbook
- Directory



[Link to CESA 9 Employee Access Website](#)

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Only Cover
HR Topics



An Inclusive Process



- Cover as much as possible - *The goal is to set them up for success*
- Include others in the process - supervisor, administrator, etc.
- Your goal is to set them up for success



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Lack
Clarity



Be Clear and Consistent

- Make sure people are on the same page
- Make sure resources align
 - Handbook and policy match
- Make sure things are updated
- Use agendas and checklists



Orientation Meeting Agenda: Supervisor Meeting (Day 1)

1. Get to know the new person

- Take them to lunch
- How's it going so far?
- What are you excited about?
- What are you nervous about?

2. Schedule

- Discuss the regular work schedule

i. Contracted Staff

- Typical start time, end time is not dictated but staff should generally be available during the work day for calls, emails, etc.
- The minimum expectation of 7.5 hours per day
- Explain how time, as workload allows, can be flexed (e.g. 10 hour day today, could be 6 hour day tomorrow)
- Expectations for communicating whereabouts to both their supervisor and their support person via their "default" Google calendar
- Telemwork Policy & Telemwork Agreement**
 - Discuss policy
 - Complete telemwork agreement - be sure to communicate that you're setting the minimum expectations - more time in the office may be needed and/or required
 - Explain the phone app and the expectation of availability when telemworking

ii. Hourly Staff

- Start time, end time
- Unpaid lunch break

New Hire Checklist for Supervisors		
Position:		
Interview Date(s):		
Estimated Start Date:		
New Employee Name:		
Task Name	Done	Notes/Comments
Decision to Hire - work with rest of the admin team to:		
Determine need, assignments, qualifications for position	<input type="checkbox"/>	
Discuss funding/budget with Director of Finance	<input type="checkbox"/>	
Determine office space, work location(s)	<input type="checkbox"/>	
Ask admin assistant to share interview question template	<input type="checkbox"/>	
Ask admin assistant to share sample job posting	<input type="checkbox"/>	
Review/create/edit job description (or template if a new position)	<input type="checkbox"/>	
Review/create/edit interview questions- notify admin asst when complete	<input type="checkbox"/>	
Review/create/edit look fors- notify admin asst when complete	<input type="checkbox"/>	
Determine posting open & close dates	<input type="checkbox"/>	
Determine interview team & dates - notify admin asst	<input type="checkbox"/>	
Interview Prep - work with rest of the interview team to:		
Review application materials & recommend interviewees	<input type="checkbox"/>	
Review/ensure license or credentials	<input type="checkbox"/>	
Send interviewee list to admin assistant for scheduling	<input type="checkbox"/>	
Conduct interviews	<input type="checkbox"/>	
Reference checks	<input type="checkbox"/>	
Ask admin assistant to run background check	<input type="checkbox"/>	
Recommend candidate to Agency Administrator	<input type="checkbox"/>	
Offer position to candidate w/ Director of Finance	<input type="checkbox"/>	
Notify admin assistant	<input type="checkbox"/>	
Work with Director of Finance to determine orientation day/first day of work	<input type="checkbox"/>	
	<input type="checkbox"/>	Offer Guidelines WIP

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Don't Tell
Them Who
Contact



Contacts

- Beyond HR
- Assign mentor(s)



-10-

Ignore or
Don't Ask for
Feedback



Gather & Use Feedback

- Informal
- Formal

offboarding

- Handoffs
- Take the Opportunity to Learn & Collect Data
 - Exit survey or exit interview
- Be Consistent
 - Checklist for HR
- Communicate Expectations, Tasks
 - Checklist for the employee





Al Betry
Agency Administrator

Cooperative Educational Service Agency #9
304 Kaphaem Road Tomahawk, WI 54487
Ph. (715) 453-2141 FAX (715) 453-7519 www.cesa9.org

January 9, 2020

Dear (Employee Name),

Please read the following information regarding the end of your CESA 9 employment carefully.

- We ask that you complete a short exit survey regarding your experience as an employee of CESA 9 (<https://forms.gle/8m12kqJHgVNazb446>).
- Please drop off any CESA 9 owned technology (i.e. laptop or ipad) or materials at the CESA 9 office on or before your last day of work.
Our records indicate you have the following CESA 9 property:
→
- Please drop off your CESA 9 p-card and unsubmitted receipts on or before your last day of work.
- Please drop off your CESA 9 I.D. badge before your last day of work.
- Make sure your final expense report is submitted and your calendar is completed on or before your last day.
- Your last day of work at CESA 9 will be (date). Your last paycheck will post on (date).



Artigo • Arbor Vitae-Woodruff • Athens • D.C. Everest • Edgar • Elcho • Lac du Flambeau • Lakeland Union High • Marathon City • Merrill
MHLT (Minocqua) • Mosinee • North Lakeland • Northland Pines • Phelps • Prentice • Rhineland • Rib Lake • Stratford • Three Lakes • Tomahawk • Wausau

CESA 9 Employee Termination Checklist

Name: _____

Last Day of Work: _____

Last Paycheck Date: _____

Benefit End Date: _____

Resigned/Retired/Layoff/Terminated/Retired (Circle One)

Prior to Last Day

- Update and Send [CESA 9 Employee Benefits Termination Letter](#)
 - This letter should be an ATTACHMENT in an email, not copy and pasted.
- Enter Termination Date in Skyward
- Update email address in Skyward (still access check stubs and W-2s)

Last Day

- Change Google Password & Set Out of Office Reply
- Collect Keys
- Collect P-Card
- Collect I.D. Badge
- Collect Technology
- Notify IT Department (email Mike & Hanna)
- Notify bank if applicable

Less than 30 Days Prior to Last Day

- Notify WCA/UMR Online (add the confirmation print out to the termination checklist)
- Enter term on UMR to generate COBRA notices where applicable
- Term National Insurance (LTD & Life) (add the confirmation print out to the termination checklist)
(LTD termination date should be LAST DAY OF WORK; LIFE termination date should be LAST DAY OF CONTRACT)

Here are the steps to terminate online:

1. Nisbenefits.com and log in with your credentials
2. Click on the "employees" tab and find the employee you want to terminate
3. Click on "edit" next to the employee in question

Activity

Think back to your first day worry...

Would any of these strategies have made your experience better?



SLIDES

QUESTION

S
???



<https://bit.ly/SBOPONBOARDING>



THANK
YOU!

