

# THE COMPLETE EMPLOYEE JOURNEY: FROM OFFER TO ALUMNI STATUS (AND EVERYTHING IN BETWEEN)

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## HIGHLIGHTS

- The transition from recruitment to onboarding must be seamless, instantaneous and showcase your culture as a warm and welcoming place to be.
- As organizations become more fluid and human roles shift, cross-boarding will increase in prevalence – presenting a golden opportunity to re-engage and re-deploy a high performer.
- Transitioning active employees to advisor or alumni status should include an experience that sets a positive tone for an ongoing relationship and empathetically gathers intelligence.
- At all phases, technology can automate administrative tasks brought about by employee movement, such as employment contracts, compliance-related updates, IT systems access, salary and bonus reviews, payroll changes, and physical workspace setup.

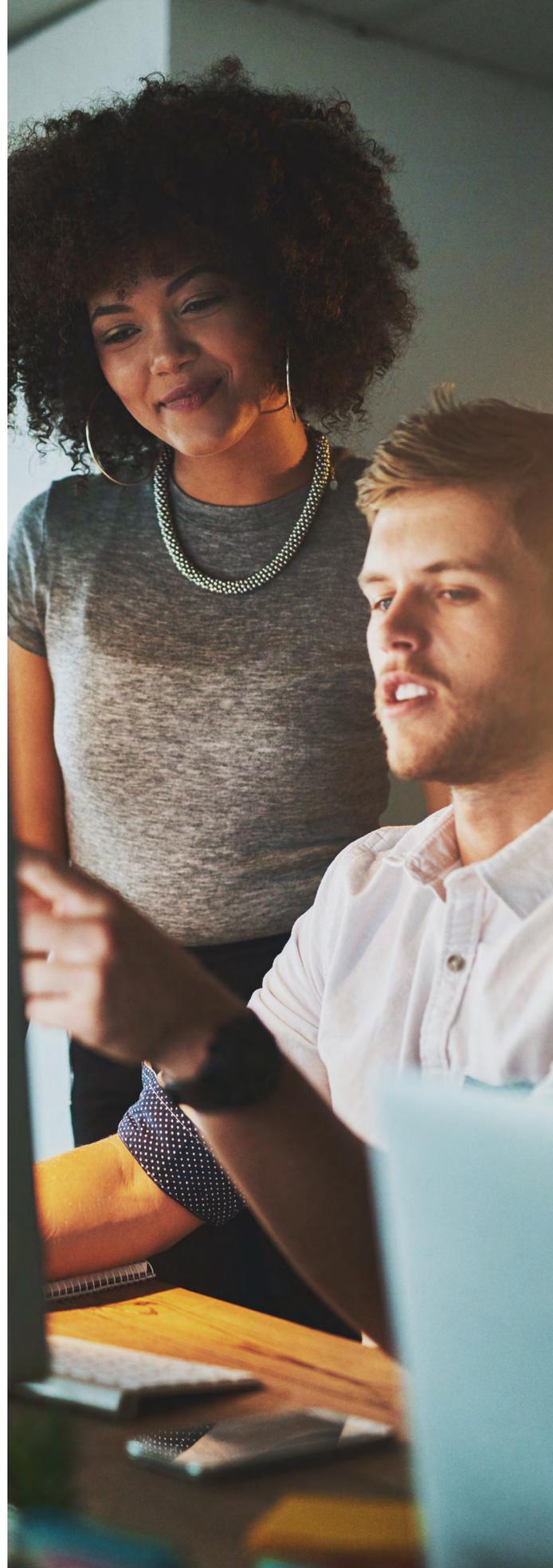
## ACCORDING TO RECENT RESEARCH BY THE CORPORATE EXECUTIVE BOARD,

when a leader successfully transitions into a new role, it's extremely likely (90 percent) that the leader's team will meet its three-year goals, and additionally, members of that team will experience a 13 percent less turnover rate. However, a rocky leader transition results in 20 percent lower employee engagement and 15 percent lower team performance.

This is just when the leader is new. Imagine what happens when you have multiple team members making work-related changes at the same time. Unfortunately, we haven't always been strategic or proactive on this front. We're lucky if we effectively move people from recruiting to onboarding: once individuals are ensconced in the organization, we may forget about them entirely.

But in the near-future business world, people will more frequently shift employment structures and roles and continuously gain additional skillsets, and the way we manage these transitions directly impacts our organizational productivity and success.

This paper will explore both technology and human-driven best practices to create "moments that matter" at critical junctures in the employment lifecycle, including onboarding (the offer letter, the first week, the learning and development kickoff), cross-boarding (the role, schedule or geography change and the return from time off/sabbatical) and offboarding (the transfer to advisor or alumni status).



## ONBOARDING

New hires form permanent impressions about their organization very quickly after deciding to join. For this reason, the transition from recruitment to onboarding must be seamless and instantaneous and must showcase your culture as a warm and welcoming place to be. In addition to reinforcing details about the organization's mission, vision, values and brand (which, hopefully, they already heard during the recruitment process), you must facilitate ongoing, informal communication between the new hire and their manager and team from the moment they sign the offer. Instant messaging and other real-time discussion platforms can build anticipation and knowledge in advance of the start date and help to address and assuage any concerns.

Leverage automation to digitize and secure the necessary paperwork, schedule in-person meetings with key staff during the first week, and customize the new hire's workspace, equipment, and supplies. On the first day and beyond, send frequent, personalized messages relevant to the new hire's situation, and serve up workflows that walk them through their responsibilities and begin tracking their skill acquisition and performance goals (information you can later use for cross-boarding initiatives). Here are some examples of the thoughts and feelings you wish to engender as the new hire transitions from candidate to employee.

### OFFER EXPERIENCE

- The hiring process was so fast and efficient.
- This organization really values me.
- I already feel connected to my new boss and team.
- I grasp and believe in this organization's purpose and reason for being.
- I can't wait to start the job!

### THE FIRST WEEK

- My manager and teammates are happy I'm here and want to help me.
- I understand my role and performance expectations, and how things work around here.
- I have access to the people, resources, equipment and supplies I need to do my job effectively.
- I already feel integrated into the organization.
- I made the right decision in coming here.

### LEARNING AND DEVELOPMENT KICKOFF

- I'm clear on the skills and training I'll need to succeed in my role.
- I understand where my current path leads and how my role relates to the company's larger goals.
- I'm comfortable with the plan for acquiring new skills over time.
- The organization is making it easy for me to learn while undertaking my daily responsibilities.
- This company is the ideal place to grow my career.



## CROSS-BOARDING

Cross-boarding refers to the act of moving an existing employee into a new role or function based on business needs and/or their talent, expertise, and interests. Under the general cross-boarding umbrella, I also include employees who move to a new work structure, schedule, or geography, and those who return to work after an extended leave.

As organizations become more fluid and human roles shift with greater automation, cross-boarding will increase in prevalence. It can present a golden opportunity to re-engage and re-deploy a high performer, but if the transition isn't done properly, you risk setting the employee and the organization up for failure.

As with onboarding, technology can assist with administrative tasks brought about by employee movement, such as employment contracts, compliance-related updates, IT systems access, salary and bonus reviews, payroll changes, and physical workspace setup. Strategies to assimilate the cross-boarder into their new environment may be even more important than when the individual was brand new to the company, because the assumption exists that they already "know everyone and everything."

Your cross-boarding transition process too should include co-worker and adjacent staff introductions, social invitations, rapport-building between manager and new employee, and surveys to monitor adjustment. Regularly serve cross-boarders motivating messages regarding new role expectations and learning opportunities and provide their managers real-time coaching content to properly support those moving.

Your cross-boarding "moments that matter" should reflect that change is difficult for human beings. Even if the cross-boarder wanted the change, they may experience psychological reactions (anger, confusion, depression, etc.) requiring patience and support. After all, you don't want to successfully solve for high recruitment costs and staffing shortages only to have cross-boarding backfire in the form of poor performance, diminished engagement, and shorter tenures. Your transition experience should foster the following sentiments in these cross-boarding situations.

## ROLE CHANGE

- My manager and teammates are happy I'm here and want to help me.
- I understand my role and performance expectations, and how things work around here.
- I have access to the people, resources, equipment and supplies I need to do my job effectively.
- I already feel integrated into the organization.
- I made the right decision in coming here.

## SCHEDULE OR GEOGRAPHY CHANGE

- My life may be changing radically, but the company has my back.
- The organization is flexible and receptive to my needs.
- I am competent to perform my job well within the confines of my new arrangement.
- I feel so much less isolated because my new teammates are reaching out to me.
- Working here makes all the upheaval worth it.

## RETURN FROM TIME OFF

- A week prior to my start date, I already felt integrated and welcomed back into the organization.
- The organization and my manager have been interested in hearing my thoughts and feelings about returning to work.
- I am in the loop and can easily access up-to-date information pertaining to my role.
- I feel supported as I ramp up to full productivity.
- I think I could stay here for the long-term, regardless of what might arise in my life.

## OFFBOARDING

The last phase of the employment lifecycle is often the most neglected. As leaders and managers, you might want to cut your losses because there's no point in trying to do right by the employee at this juncture. This isn't a good idea. Valuable, trusted employees who know your industry and your business are rare, and there's a good chance you'll want to work well with them in the future – whether as boomerang employees, contractors, or even clients. And, even invaluable employees have friends and colleagues to whom they can speak positively or negatively about your organization.

Transitioning active employees to advisor or alumni status should still include “moments that matter” via an experience that sets a positive tone for an ongoing relationship and empathetically gathers intelligence about what you can improve for other employees. Your offboarding protocol must incorporate manager and employee checklists and timelines, exit interview documentation, and legal, compliance, and IT security instructions, as well as forums for sustained feedback and communication. However, these essentials should be accompanied by sincere messages about the employee's contributions and achievements. It may take some practice and creativity to devise verbiage that straddles the line between eye-rolling cheesiness and corporate coldness, and that acknowledges the ending at hand while also expressing hope for continued engagement. Your departing employees will ideally leave with these views:

### ADVISOR STATUS

- I've been an important member of this organization.
- I feel that my accomplishments are celebrated and that I'll be missed.
- Even though I'm retiring, I understand how I can continue to add value.
- I know exactly what needs to happen to ensure I wrap up things here smoothly.
- I anticipate that this organization will remain a meaningful part of my life.

### ALUMNI STATUS

- The organization is attentively listening to and responding to my feedback.
- My manager and I acknowledge how much I've learned and achieved here.
- From a logistics standpoint, the organization is doing right by me.
- I have an easy way to engage with the organization going forward.
- I feel cared for and appreciated rather than angry, disappointed, or resentful.

## SPOTLIGHT: STEELCASE

A global organization dedicated to creating great workspaces, the 10,000+ employee Steelcase places high importance on building equally great leaders. However, the process for moving from individual contributor to supervisor wasn't as effective as it could be. Steelcase didn't offer leadership training and new managers had to locate mentors and resources on their own.

To bring new leaders up to speed more quickly, Steelcase launched the high tech, high touch ENGAGE program, which combines a formal leadership program with strategic automation. The SilkRoad Onboarding portal builds excitement and pride while serving as a hub of new supervisor information, tasks, and resources, and clearly delineating the anticipated experiences participants will undertake. After the 90-day program, the new leaders attend a 2-day bootcamp in which they discuss what good leadership looks like, role-play together, learn how to help employees feel fulfilled, and address how to apply the Steelcase culture to lessons learned.

According to Steelcase, the flexible program structure and easy information access has improved new manager comfort and effectiveness in their new roles, and instilled the belief that the company is invested in their long-term success.

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