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On and Offboarding

The Benefits of Enterprise Service Management

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Introduction

"There is no second chance for a first impression," so the saying goes. In a working world where competent professionals can change jobs regularly, an efficient onboarding process is very important. Onboarding should be considered the first step in the employee's journey in the company.

Service Integration With Use Case Onboarding

"There is no second chance for a first impression"

Onboarding is an independent corporate discipline. The service should include the following aspects:

- **Targeted and sustainable orientation**
- **Social integration**
- **Structured entry into the company**
- **Binding of the new employee to the company**

The more structured the process, the faster the new employee is integrated and can contribute performance.

No company can exist without personnel, even and especially in times of increasing digitalization. In most cases, personnel selection is subject to a structured procedure in the recruiting process and is carried out carefully.

Each step is defined, perhaps a tool is used to support the process, or the activities are carried out manually and without tool support. The following applies to both possibilities: once the new employee is "on board", far less attention is often paid to the personnel-related follow-up processes.

Very often, new employees have the feeling that their new employer has lost interest in them after signing the employment contract. However, it is precisely these first experiences that are very formative for the new employee. If onboarding and offboarding are not organized in an optimal and structured way, this has consequences for productivity and the company's image.

It also harbors IT and data security risks because of missing or late involvement of the relevant process participants. Compliance violations and high licensing costs and hardware costs may be the result. In many industries, such as insurance and banking, an employee must be offboarded within 24 hours. By then, all access permissions must have been revoked, hardware returned, and licenses decommissioned. In very few cases, this can be achieved.

The onboarding of new employees is increasingly developing into an independent discipline. Both a well-established workflow and the support of all participating departments play a decisive role.

It is not only the first impression that counts with employees but the last impression as well. Offboarding is the process by which the employee leaves the company. Like onboarding, this process should be structured, smooth, and appreciative to strengthen employee loyalty and the company's reputation.

Scenario when there is no integrated onboarding process

The lack of a structured onboarding workflow will cause confusion in the participating departments and will be detrimental to productivity and employee morale.

This first part of this white paper explains how to establish end-to-end on- and offboarding workflows.

The second part shows how 4me facilitates these workflows.

Enterprise Service Management (ESM)

Enterprise Service Management is the extension of IT Service Management principles to additional business departments like HR, finance, marketing, and facilities. Onboarding and offboarding require the involvement of multiple departments, and will therefore benefit greatly from Enterprise Service Management capabilities. For a successful implementation of a cross-departmental workflow like on- or offboarding, an organization needs to consider:

- Workflow and ownership. Activities need to be performed in a certain order. In order to establish and maintain this workflow, it needs ownership. This owner needs to be aware of all the high-level steps and compliance requirements of the end-to-end workflow. Detailed knowledge of all the individual actions is not required because the responsibility for these actions will be delegated to the participating departments. Later in this document, a more detailed example of this delegation will be provided.

- Value. The value of a well-established on- and offboarding process has both objective and subjective elements. Decreased operational cost is an obvious example of objective value, while perceived convenience, predictability and employee satisfaction are examples of subjective value. Both should be measured and monitored, so all required measurements and reports need to be in place.

- Replacement of existing tools. Involved departments often have their own tools in place to handle demand and work. A common pitfall is trying to replace all these tools with a single solution. This forced replacement is often neither necessary nor possible and will likely generate pushback. The overall goal is to standardize, manage and monitor the overall workflow, not to enforce a 'one size fits all' solution. Integrations between the ESM tool and department-specific tools could be considered. Depending on the (expected) volume of tasks, these integrations might not even be necessary. Completing a task in a user-friendly ESM tool should take only a few clicks.
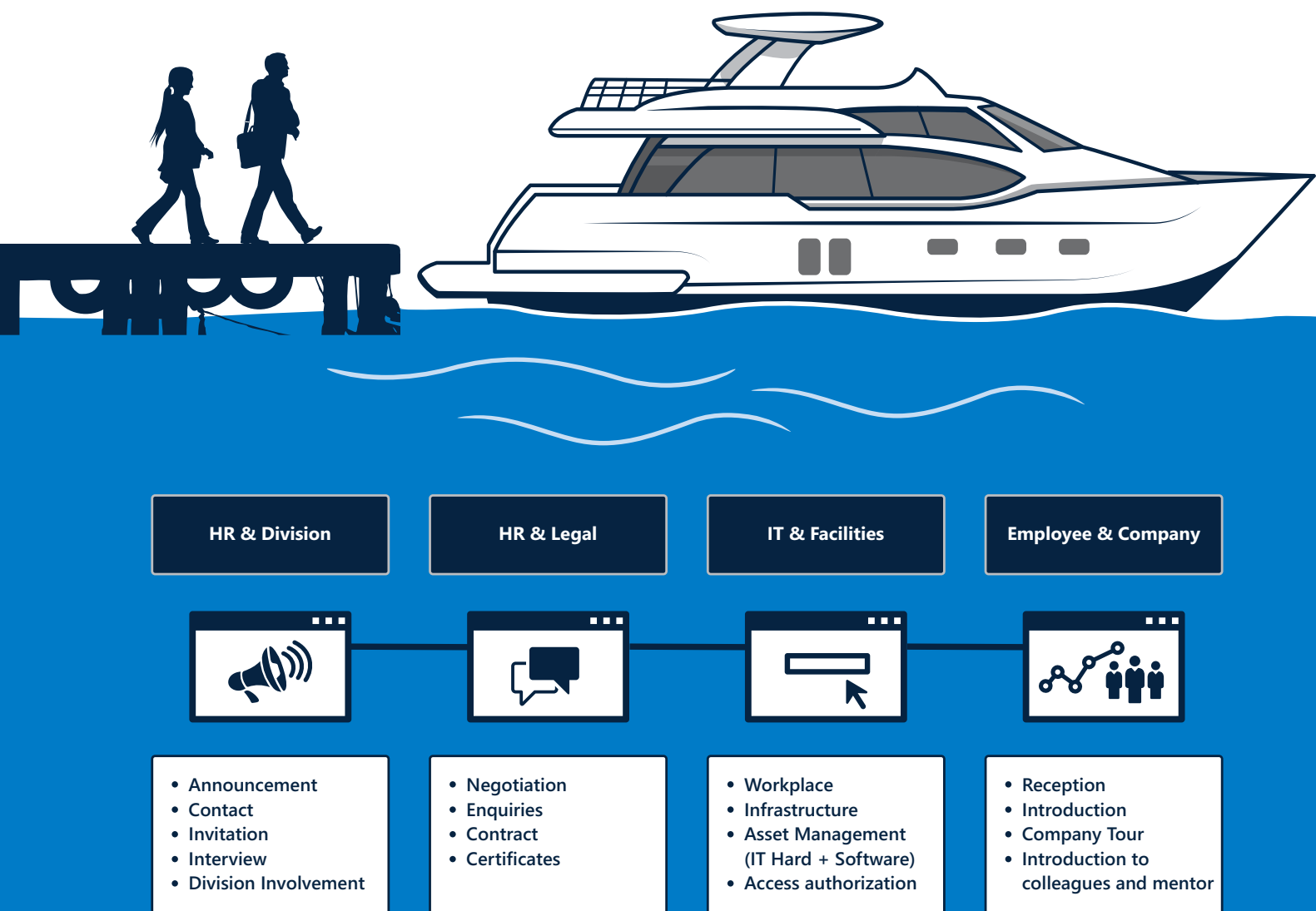
In the next chapters, example workflows for on- and offboarding will be discussed. A detailed explanation of how ESM scenarios are supported by 4me is provided in the final chapter.

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Systematic Onboarding

The "Systematic Onboarding" workflow includes all departments involved in the onboarding.

The workflow involves the new employee as well as the specialist departments: Human Resources, Legal, and Facility Management.

The following image shows a schematic example of this workflow:

HR & Division	HR & Legal	IT & Facilities	Employee & Company

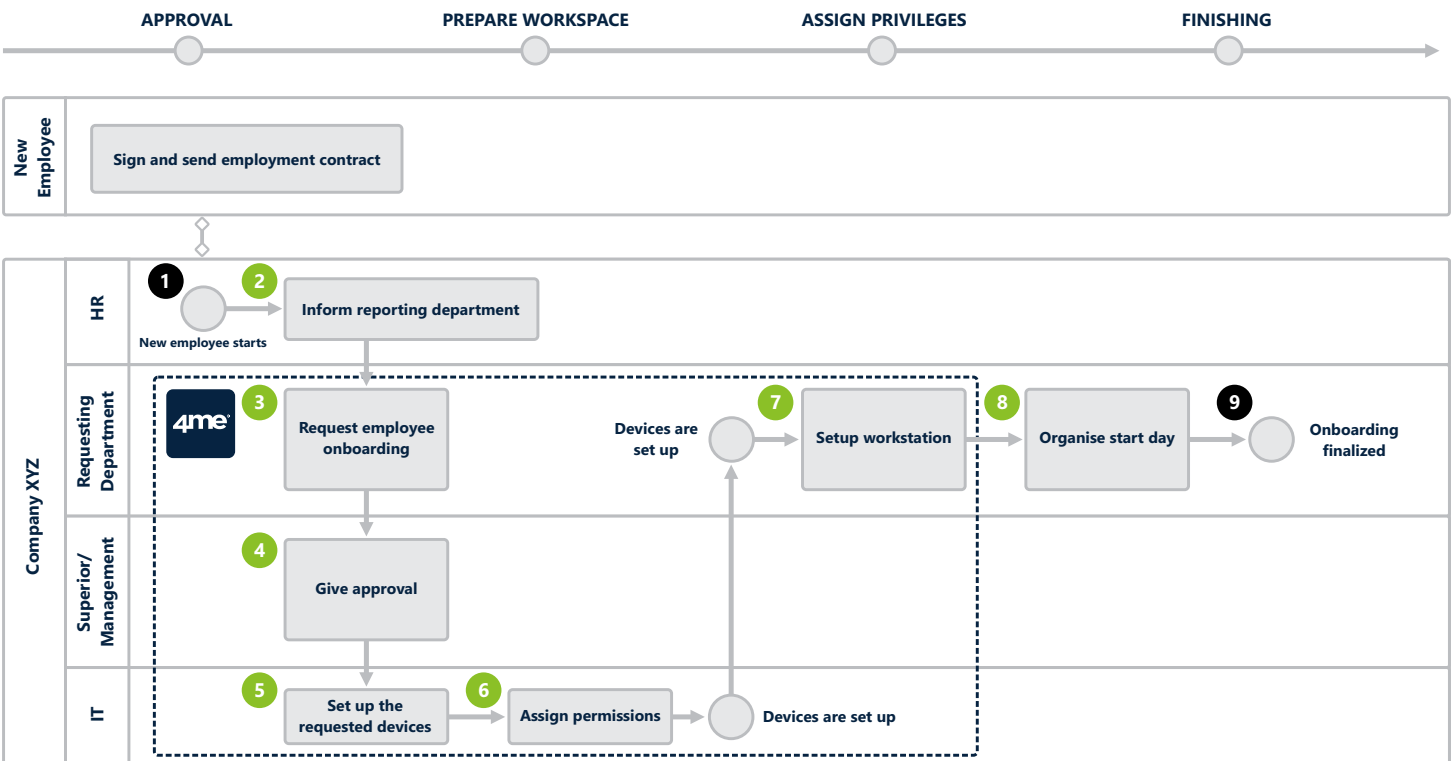|			

• Announcement
• Contact
• Invitation
• Interview
• Division Involvement
	• Negotiation
	• Enquiries
	• Contract
	• Certificates
		• Workplace
		• Infrastructure
		• Asset Management
		  (IT Hard + Software)
		• Access authorization
			• Reception
			• Introduction
			• Company Tour
			• Introduction to
			  colleagues and mentor

Onboarding Workflow

An ideal onboarding process is similar to a bus driving a predetermined route to ensure the destination is reached in time and all agreed stops are included.

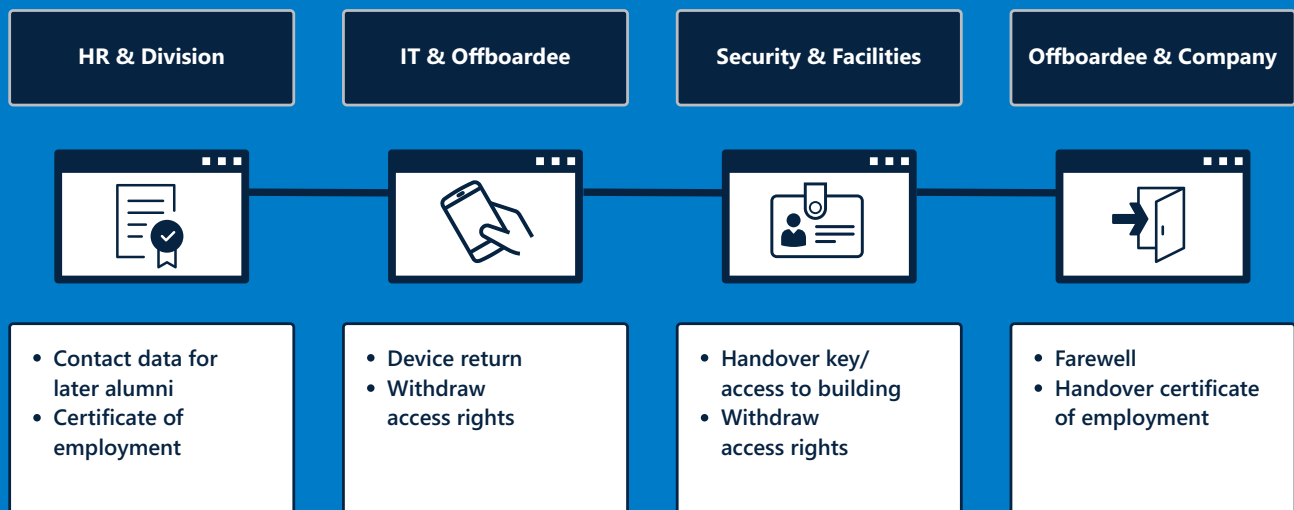**Request has been created successfully.**

| APPROVAL | PREPARE WORKSPACE | ASSIGN PRIVILEGES | FINISHING |

New Employee

Sign and send employment contract

Company XYZ

HR
1 New employee starts
2 Inform reporting department

Requesting Department
3 Request employee onboarding
Devices are set up
7 Setup workstation
8 Organise start day
9 Onboarding finalized

Superior / Management
4 Give approval

IT
5 Set up the requested devices
6 Assign permissions
Devices are set up

TASK NO.	TASK NAME	ROLE / LANE	DESCRIPTION
1	New employee starts	Human Resources	HR starts the onboarding service
2	Inform requesting department	Human Resources	Informs the requesting department
3	Request employee onboarding	Requesting Department	Creates ticket in 4me and can track service status at any time
4	Give approval	Senior Management	Approves (or disapproves) the onboarding of the new employee
5	Set up the requested devices	Information Technology (IT)	Creates account for Onboardee and prepares hard- and software for start day
6	Assign permissions	Information Technology (IT)	Assigns the permission for new employee
7	Set up workstation	Information Technology (IT)	Sets up a workstation for new employee
8	Organize start day	Requesting Department	Organizes Start day to welcome new employee
9	Onboarding finalized	Requesting Department	Onboarding service ticket is closed

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Systematic Offboarding

It is not only the first impression that counts with employees, but also the last impression. Offboarding is the process by which the employee leaves the company. Just like onboarding, this process should be structured, seamless and appreciative in order to strengthen employee loyalty and the company's reputation. The service "Systematic Offboarding" involves all departments participating in the offboarding process. The image below shows an example of the involvement of different departments in an offboarding process.

The process chain presented involves the offboardee as well as the specialist departments, Human Resources, IT, Facility Management, and Security Management in almost every single step. During the offboarding process, it is very important that every single step within the service is transparent and that every approval step is saved and documented in a comprehensible way.


HR & Division	IT & Offboardee	Security & Facilities	Offboardee & Company
• Contact data for later alumni • Certificate of employment	• Device return • Withdraw access rights	• Handover key/ access to building • Withdraw access rights	• Farewell • Handover certificate of employment

Offboarding Workflow

An ideal offboarding service ensures that within 24 hours, the offboardee no longer has access to the systems (IT and non-IT), no longer has access to the company, and that software licenses are canceled. The employee leaving the company has been handed all personnel-related documents (e. g. employer's reference). Ideally, this process is documented in the tool in order to comply with the compliance guidelines.
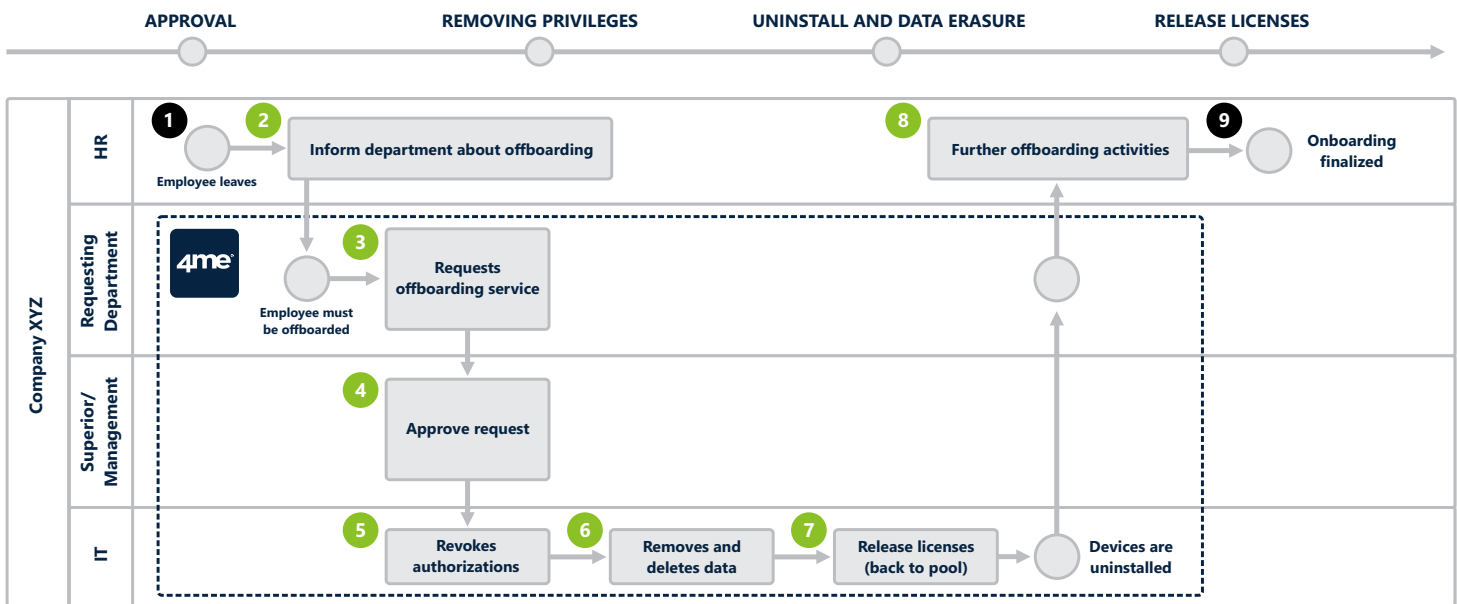
TASK NO.	TASK NAME	ROLE / LANE	DESCRIPTION
1	Employee leaves company	Human Resources	HR starts the offboarding service
2	Inform department	Human Resources	Informs the department, the Offboardee works in
3	Request Offboarding	Requesting Department	Creates ticket in 4me and can track service status at any time
4	Approve request	Senior Management	Approves (or disapproves) the offboarding request
5	Revoke authorization	Information Technology (IT)	Withdraws access rights dated for the day of leave
6	Removal and data detection	Information Technology (IT)	Removes
7	Release licenses	Information Technology (IT)	Release licenses from workstation of Offboardee (back to license pool)
8	Further Offboarding tasks	Human Resources	HR task folder for further tasks during the offboarding service (beyond tool)
9	Offboarding finalized	Human Resources	Offboarding Service ticket is closed

Integrated Workflows in 4me

Managing a cross-departmental process using traditional tools is challenging due to their architecture.
This chapter explains the unique architecture of the 4me platform and its benefits for complex processes like on- and offboarding.

The Issue With Traditional Service Management Tools

Usually, each department involved in the on- and offboarding process uses of its own set of tools to manage demand and processes. Some departments might even still use shared email accounts. This can be problematic when certain activities need to be executed in a specific sequence because there is no single point to manage and monitor the workflow.

In addition, the various systems or instances need to be integrated to enable this level of collaboration. This is expensive and often very complex.

4me Is a Multi-tenant Platform

4me is a multi-tenant platform, meaning that all departments use the same production environment and therefore use the same version of the application. The data of each department is segregated by (very stringent) application logic, not by physical boundaries. Such a segregated environment is called an account. Each account has its own master data like services, SLAs, contracts, and teams, as well as transactional data like requests, workflows, tasks, projects and knowledge articles.

You Need Trust to Collaborate

An organization can have as many accounts as needed. So in our example, you would have accounts for each department like IT, HR, Facilities and Legal. With this setup, we have eliminated the need to configure and maintain separate applications or instances. But what about the integrations?

This is where trusts come into play. A trust is a handshake between accounts with which you agree on the possibility to exchange services and tasks. The visibility of information is automatically handled by 4me, allowing you to collaborate with different accounts without the need for any integrations.
version of the application.

A Special Type of Account: the Directory Account

But what about users, organizations and sites? This type of master data is often required in all accounts belonging to a single organization. Does this mean the data needs to be replicated to all accounts? Luckily, this is not necessary. A directory account is a specific type of account in which this type of data is stored. Typically an organization uses a single directory account and all other accounts can make use of the master data in this account.

EMPLOYEES

DIRECTORY
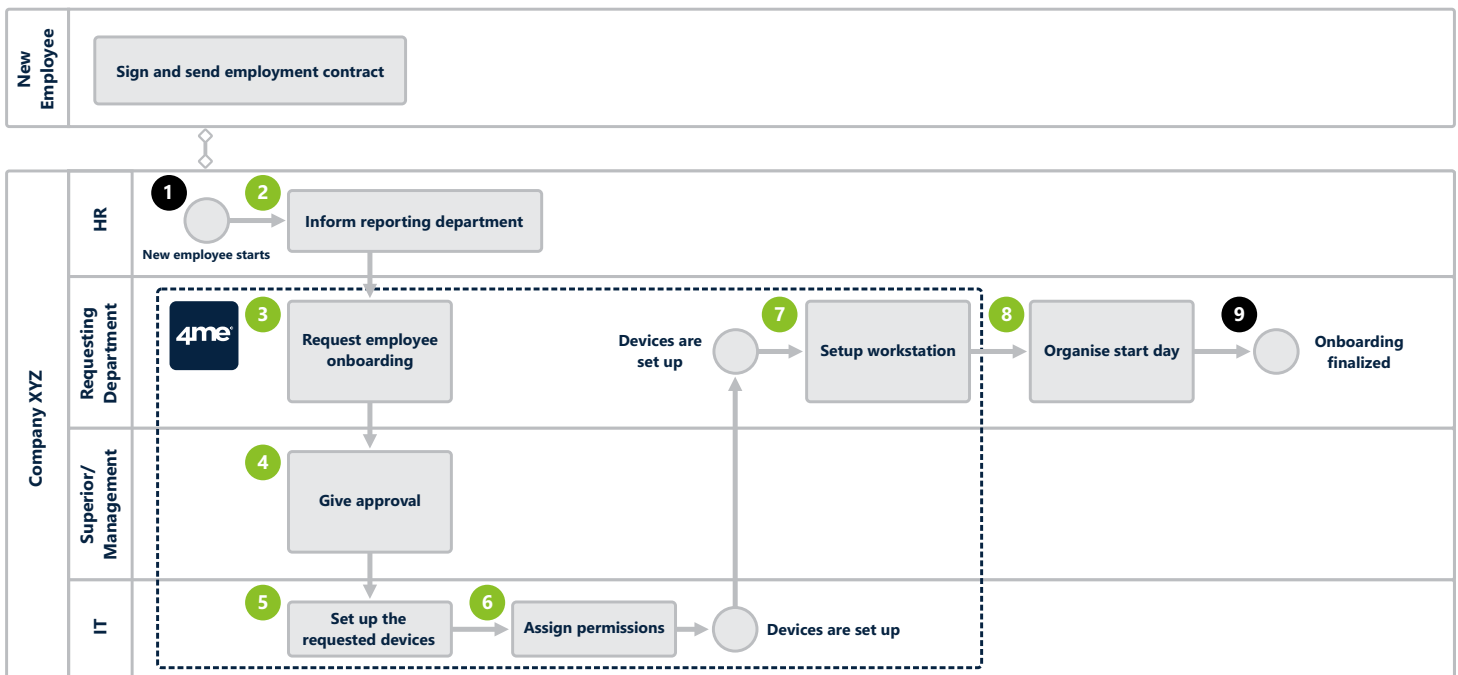ACCOUNT

HR

FACILITIES

IT

SUPPLIER
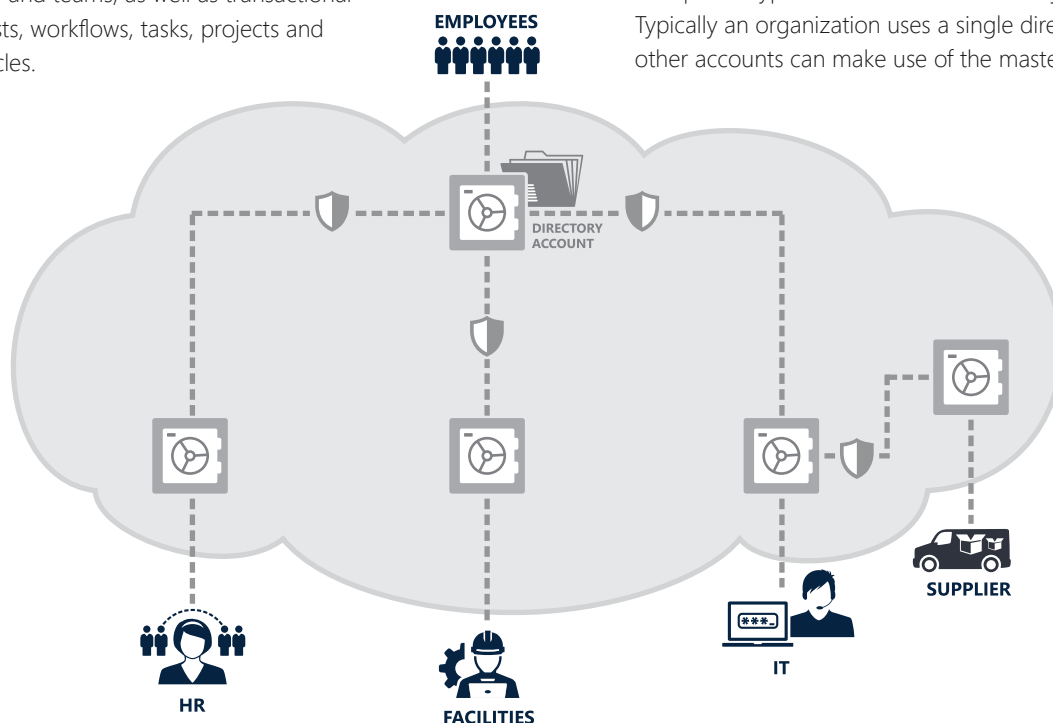
The On- and Offboarding Process in 4me

As mentioned earlier in this white paper, trusts between 4me accounts allow exchanging tasks related to workflows. In 4me, on- and offboarding are registered as workflow templates: a collection of activities that need to be executed in a certain sequence. Each time an employee is on- or offboarded, a new workflow is created in 4me, according to the template.

The onboarding process provided earlier could serve as an example to demonstrate how this workflow would be administered in 4me. For this example, the assumption is that the new employee will start working in the Finance department and that the HR department is responsible for the overall onboarding workflow.

This chapter explains the unique architecture of the 4me platform and its benefits for complex processes like on- and offboarding.

A manager or team lead of the finance department logs in to 4me Self Service and registers a new request, using the onboarding template which is offered from the HR account in 4me.

As soon as the request is submitted, a new onboarding workflow is created and started automatically.

The first task in the workflow is an approval of the manager of the new employee.
This approval can be completed by the manager using Self Service or the 4me mobile app.
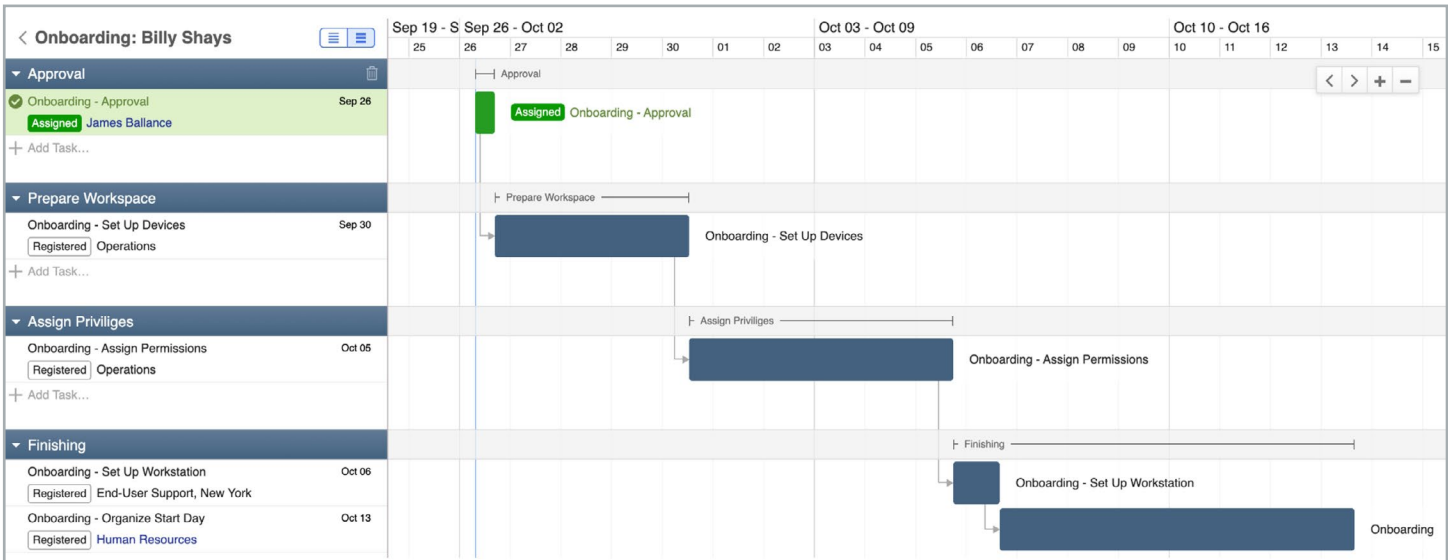
As soon as the approval is received, the next task in the workflow is automatically activated and assigned to a team in the IT account in 4me. This task becomes visible in the IT account and will be completed by the team to which the task was assigned. Similarly, other tasks in the workflow automatically become visible in the responsible account, based on the assignment details of the tasks. All tasks are also visible in the HR account, to allow HR to monitor the progress of the workflow.

As soon as all the tasks of the workflow are completed, the workflow itself is also completed. This, in turn, will complete the initial request automatically. This ensures that the submitter of the request is notified of the completion of the onboarding.

Secondary Workflows

But what if the completion of a certain task requires a workflow by itself? In the example workflow, a single task for IT requests setting up the devices for the new user. In reality, this might require different teams to be involved in ordering the devices, installing software, registering the devices in the asset register, etc. When we assume HR is responsible for the end-to-end workflow, this would mean that we expect HR to be aware of all the detailed steps required for each department. Also, when a department-specific workflow changes, these changes would need to be reflected in the workflow template in the 4me account of the HR 4me department.

This is why 4me supports secondary workflows: one workflow task can trigger an additional workflow if required. So in the example onboarding workflow, the task for preparing the devices activates an IT-specific workflow, with all the internal tasks for the IT department to complete this single onboarding task. The IT-specific workflow is only visible in the IT account in 4me and can be modified any time the IT organization sees fit.

The image below shows a schematic example of 2 tasks in the main workflow with a secondary workflow:

4me Supports Cross-departmental Workflows Out of the Box

This chapter explained how the architecture of 4me enables you to manage complex cross-departmental workflows without the need to integrate separate systems or application instances. Each department can manage its own specific internal workflows, which underpin the overall on- and offboarding workflow.

Read more about the Enterprise Service Management capabilities of 4me **here**.

Conclusion

A successful implementation of on- and offboarding workflows requires an organization to identify the tasks for each participating department and the order in which these should be completed. The extensive Enterprise Service Management experience of b-pi can support you with defining the end-to-end workflow and ensuring your compliance requirements are met.

4me is a service management platform with out-of-the-box support for cross-departmental workflows. The required workflows for managing your on- and offboarding can be configured quickly, without the need for integrations.

About b-pi

best-practice innovations (b-pi) is a qualified partner for process, service, and project consulting. b-pi ensures that an organization's central services interact with each other according to the requirements, all service providers work together as a team, products are delivered quickly and profitably, and strategic business goals are met.
b-pi.com

About 4me

4me® combines ITSM with ESM and SIAM capabilities, enabling all internal departments, such as IT, HR, and Facilities, as well as external managed service providers, to work seamlessly with each other. At the same time, 4me provides complete visibility and control of service cost and quality.