

Onboarding & Offboarding Using Project Management



ONBOARDING

&



OFF-BOARDING





TIFFANY BUNNEY

IT Senior Support Specialist



FELLOWSHIP
GREENVILLE





EDDIE HOLEMAN

Executive Director of Ministry Services



FELLOWSHIP
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For more information

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Additional resources: <https://github.com/fellowship-greenville/onboarding>



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The Challenge:



Trying to keep up with all the pieces of onboarding a new hire, and offboarding someone leaving, can cause things to be missed because of poor communication.





1. A tool that communicates well
2. Something with flexibility
3. A tool everyone can use and is familiar with
4. Can launch off the existing employment application





1. Launches from our existing Employment Application
2. Create a supervisor form
3. Build one parent project, with subprojects per department



The Tools You Need



Rock Workflows

BLUE BOX MOON



Project
Management
System



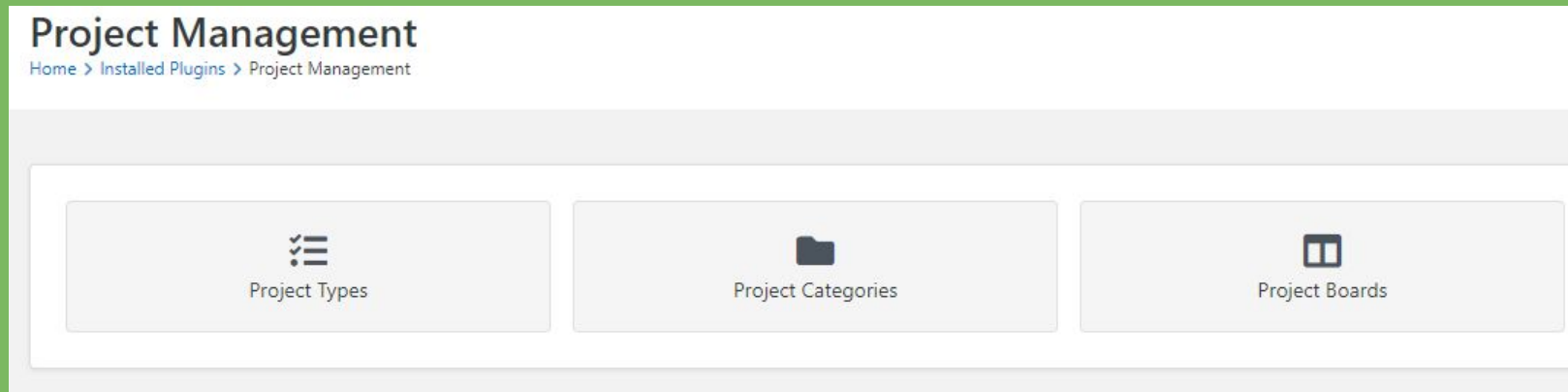
Recipe

1. Meet with support staff

- Specific questions & tasks from each ministry area
- Current pain points



2. Build Project Type



Edit Project Type

Name *
Onboarding

Icon Css Class ⓘ
fas fa-toggle-on

Description

Child Project Types ⓘ
Onboarding × +

Attachment File Type ⓘ
Project Attachment

Active
☒

Category Required ⓘ
☐

Communication ▼

Advanced Settings ▼


Project Attributes ▼

Save **Cancel**




3. Launch from Employment Application


Background Check processed




References called



Formal offer letter sent *




Estimated Start Date *



Staff Onboarding Needed? *

☐ Yes ☐ No

Supervisor *



Position Title *

Remove Posting *

☐ Completed ☐ N/A

Timeclock #

Launches directly from our Employment Application, using the attribute: “Staff Onboarding Needed?”

Recipe



New Hire Onboarding

Id: 367

Details

Advanced Settings

Attributes Count: 58

Activities

+ Add Activity

Start

Id: 1635

Create Onboarding Project

Id: 1636

Create HR Subproject & Tasks

Id: 1637

Create Accounting Subproject & Tasks

Id: 1640

Create Support Staff Subproject & Tasks

Id: 1641

Create Facilities Subproject & Tasks

Id: 1642

Create IT Subprojects & Tasks

Id: 1643

Complete Workflow

Id: 1639

Supervisor Reminder

Id: 1638

Save

Cancel

4. Create workflow

Recipe

Start

Id: 1635

Name

Start

Active

Activated with Workflow

Description

Attributes (3)

Actions

+ Add Action

Rename Workflow

Set Requester

Assign To Supervisor

Launch Supervisor Reminder

Supervisor Form

Launch Create Project

3. Create workflow - Supervisor form

Recipe



Supervisor Reminder

Id: 1638

Name

Supervisor Reminder

☒ Active

☐ Activated with Workflow

Description

Attributes (1)

Actions

+ Add Action

Delay 1 day

Questionnaire completed

Send reminder to manager

Relaunch Supervisor Reminder

Complete Activity

4. Create workflow - Supervisor reminder

Recipe



Create Onboarding Project

Id: 1636

Name

Create Onboarding Project

☒ Active

☐ Activated with Workflow

Description

Attributes

Actions

+ Add Action

Create Parent Project - Onboarding

Assign Project

Set Project State

Launch Create HR Subprojects

4. Create workflow - Create Parent Project

Recipe



4. Create workflow - Create Parent Project



Create Parent Project - Onboarding

Name [•]
Create Parent Project - Onboarding ☒ Action is Completed on Success ☐ Activity is Completed on Success

Action Type
Create Project [•] 'Create Project' Overview
Creates a new project and stores the resulting project GUID in an attribute.

Project Type [•]
Project Type

Category [•]
Category

Parent Project [•]

Project Name [•] or Attribute Value
Onboarding: {{Workflow | Attribute: "Employee"}}

Details [•] or Attribute Value
Position: {{Workflow | Attribute: "Position"}} **Supervisor:** {{Workflow | Attribute: "Supervisor"}}

Requested By [•]
Requester

Due Date [•]
Start Date

Detect Attachments [•]
No

Copy Attachments [•]
No

Attribute [•]
Parent Project

4. Create workflow - Create Parent Project

Recipe



****Position:**** {{Workflow | Attribute:"Position"}}

****Supervisor:**** {{Workflow | Attribute:"Supervisor"}}

****Department:**** {{Workflow | Attribute:"Department"}}

****Is this employee replacing someone or a new position?**** {{Workflow | Attribute:"Isthisemployeereplacingsomeoneoranewposition"}},{{Workflow | Attribute:"Ifreplacingsomeonewho"}}

****Technology Needs:**** {{Workflow | Attribute:"TechNeeds"}}

****Furniture Needs:**** {{Workflow | Attribute:"FurnitureNeeds"}}

****Desk Location**** {{Workflow | Attribute:"DeskLocation" }}

****Will new hire manage a budget?**** {{Workflow | Attribute:"Budget"}}

****Work Schedule:**** {{Workflow | Attribute:"WorkSchedule"}}

****Will the new hire have a lunch account?**** {{Workflow | Attribute:"Lunchaccount"}}

4. Create workflow - Create Parent Project - Details

Recipe



Create HR Subproject & Tasks

Id: 1637

Name

Create HR Subproject & Tasks

☒ Active

☐ Activated with Workflow

Description

Attributes

Actions

+ Add Action

Create HR Sub-Project

Assign Project

Create Task: Key Card

Create Task: Trainings

Create Task: Photo

Create Task: Welcome Folder

4. Create workflow - Sub-projects & Tasks

Recipe



Actions

+ Add Action

Create Support Staff Project

Assign Support Staff Project

Create Task: Staff Photo

Assign Task: Staff Photo

Create Task: All Staff Invites

Assign Task: All Staff Invites

Create Task: Work Schedules

Assign Task: Work Schedules

Create Task: Name Placard

Assign Task: Name Placard

Create Staff Directory

Task: Staff Directory

Launch Create Facilities Project
















4. Create workflow - Subprojects & Tasks

Recipe



Project Types

Requested

<div></div> <div>Basic Project</div> <div><div>25</div></div>	<div></div> <div>Facilities</div> <div><div>12</div><div>139</div></div>	<div></div> <div>Rock</div> <div><div>3</div><div>21</div></div>	<div></div> <div>Comm Design Request</div> <div><div>1</div></div>
<div></div> <div>Accounting</div> <div><div>1</div><div>6</div></div>	<div></div> <div>Comm Projects</div> <div><div>2</div><div>90</div></div>	<div></div> <div>IT Projects</div> <div><div>4</div></div>	<div></div> <div>Restricted</div> <div><div>3</div><div>6</div></div>
<div></div> <div>Events</div> <div><div>2</div><div>188</div></div>	<div></div> <div>Event Childcare</div> <div><div>3</div><div>32</div></div>	<div></div> <div>Event Support</div> <div><div>1</div><div>44</div></div>	<div></div> <div>IT Support</div> <div><div>1</div><div>75</div></div>
<div></div> <div>Live Worship</div> <div><div>2</div><div>12</div></div>	<div></div> <div>Onboarding</div> <div><div>5</div><div>5</div></div>	<div></div> <div>Offboarding</div> <div><div>2</div><div>2</div></div>	<div></div> <div>Summer Interns</div> <div><div>1</div><div>2</div></div>

Recipe



Onboarding: Tiffany Bunney



#7580 - Onboarding Active

Parent Project Request Date Due Date
Category Onboarding 7/20/2022 7/3/2022
Requested By Assigned To
Beth Schaffner Debbie Thurston

Details
Position: IT Senior Support Specialist Supervisor: Eddie Holeman Department: IT Is this employee replacing someone or a new position? New Position,
Technology Needs: Furniture Needs: Will sit on floor Desk Location 268 Keys Needed: Prox Card or Fob, GM Will this employee be making purchases? Yes,
Big ones Will new hire manage a budget? No Work Schedule: 24 X 7 Will the new hire have a lunch account? No

Complete Edit Delete

Discussion

H1H2H3BBI[Link][Image][Upload]

EditPreview

Task List

Sub Projects

- HR Onboarding: Tiffany Bunney (0/10)
7/3/2022 Beth
- Accounting Onboarding: Tiffany Bunney (0/6)
7/3/2022 You Eddie
- Support Staff Onboarding: Tiffany Bunney (0/5)
7/3/2022 Debbie
- Facilities Onboarding: Tiffany Bunney (3/3)
7/3/2022 Tim
- IT Onboarding: Tiffany Bunney (0/16)
7/3/2022 Paul

Participants

- Beth Schaffner
- Debbie Thurston

Documents

Recipe



Support Staff Onboarding: Tiffany Bunney



#7583 - Onboarding Active

Parent Project
Onboarding: Tiffany Bunney

Request Date
7/20/2022

Due Date
7/3/2022

Category
Onboarding

Requested By
Beth Schaffner

Assigned To
Debbie Thurston

Details
Position: IT Senior Support Specialist **Supervisor:** Eddie Holeman **Department:** IT **Work Schedule:** 24 X 7 **Desk Location** 268 **Furniture Needs:** Will sit on floor

Complete

Edit

Delete

Discussion

H1 H2 H3 B I S



Edit

Preview

Task List



☐ Take Staff Photo

Josh



☐ Add to All Staff Calendar Invites

Katie



☐ Add to Work Schedules

Katie



☐ Create Name Placard

Katie



☐ Add to Staff Directory

You



Sub Projects



Participants

Beth Schaffner

Katie Bullock

Debbie Thurston

Josh Clark

Recipe



Offboarding



- Similar to Onboarding, but starts from a person's profile page
- Create a different project type specifically for Offboarding

Recipe





**Has this system worked for Fellowship
Greenville ?**



ANY
QUESTIONS
?



For more information

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