Enhancing Employee Experience

HR Best Practices for a Positive Workplace Culture

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Topics for Today

1	Why 'People Operations'?
2	Building Your Team – Recruiting for Longevity
3	Understanding the Generations in the Workforce
4	Onboarding with Purpose
5	Developing Your Team – Coaching and Documentation
6	Offboarding with Class
7	HR Resources at Your Fingertips
8	Open Forum!

🔑 What is People Operations?

A **people-centric reinvention** of traditional HR — focused on **employee experience, engagement, and culture**, not just administrative tasks

🧭 Core Responsibilities:

- **Employee lifecycle management**: hiring, onboarding, development, performance, offboarding.

- **Culture & engagement**: foster values-driven behavior, recognition, well-being.

- **Talent analytics**: use data to inform decisions on turnover, engagement, productivity.

- **Technology enablement**: streamline processes through people-first HR tech.

🎯 Strategic Mindset Shift

Traditional HR	People Operations
Task-oriented, reactive	Proactive, strategic
Compliance & processes	Employee development & alignment
Viewed workforce as "capital"	Views employees as unique individuals

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👬 **10-50 Employees**
- Consider a full-time HR team member
- Engage an HR consulting firm to have on call when questions arise!

👬 **51-200 Employees**
- Recommended to have 1 HR professional for every 50 employees

Key Factors That Influence HR Staffing

- **Company Size & Growth** – More employees = more HR capacity.

- **Industry** – High turnover or compliance-heavy sectors need more HR support.

- **HR Complexity** – Complex benefits, restructures, employee relations.

- **Strategic Focus** – Talent development or culture initiatives drive need.

- **Budget** – Impacts in-house vs. outsourced decisions.

- **Control & Culture Fit** – In-house HR allows deeper alignment with values.

Recruiting Best Practices

✅ **1. Define Clear Job Requirements**

- Create accurate job descriptions
- Clarify must-have vs. nice-to-have skills

🌐 **2. Expand Sourcing Channels**

- Use job boards, *employee referrals*, social media, and talent databases
- Partner with colleges, trade schools, and industry groups

🧠 **3. Prioritize Candidate Experience**

- Communicate timelines
- Streamline application and interview process
- Provide timely feedback

⚖️ **4. Structure Interviews Consistently**

- Use standardized questions and rating rubrics
- Include both technical and behavioral assessments

📊 **5. Use Data to Drive Decisions**

- Track metrics (time to hire, quality of hire, source effectiveness)
- Continuously optimize sourcing and screening

🤝 **6. Collaborate Cross-Functionally**

- Align with hiring managers early
- Clarify roles in the selection process

Building a Great Job Description

🏷️ **1. Clear Job Title**

- Use standard, searchable titles (e.g., "Sales Associate" not "Sales Ninja")

📝 **2. Compelling Summary**

- 2–3 sentences on the role's purpose and value to the team

✅ **3. Key Responsibilities**

- Bullet list of duties
- Begin each with action verbs (e.g., Lead, Manage, Support)

🌟 **4. Preferred Qualifications**

- Nice-to-haves that enhance the role
- Don't gatekeep great candidates

💼 **5. Company Culture & Benefits**

- Share perks, work environment, and mission
- Attract value-aligned candidates

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Interview Best Practices

🔍 **Transparency Around the Process**

- Candidates understand timelines, stages, and what to expect

🧍‍♂️🧍‍♀️ **Exposure to Team Dynamics**

- Opportunities to meet peers and understand team culture

💬 **Ability to Ask About Manager's Work Style**

- Creates clarity and builds alignment with leadership approach

✅ **Clear Understanding of Role & Responsibilities**

- Well-defined expectations reduce confusion and mismatches

👨‍💼 **Share Real Workplace Insights**

- Describe how your org supports and engages employees
- Use real-life stories to show daily responsibilities and collaboration

📒 **Use a Structured Interview Template**

- Keeps interviews consistent and focused
- Helps assess capabilities, competencies, and culture fit

🎯 **Evaluate Knowledge & Skills**

- Ask role-specific questions
- Look for practical understanding, not just theory

🤝 **Understand & Share Work Styles**

- Ask how the candidate works best
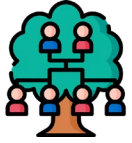- Be open about your management style to set expectations

👥 **Get a Feel for Team Compatibility**

- Consider how the candidate complements the current team
- Check for alignment with the role's objectives and team dynamic

⚖️ **Use the Same Methodology for All Candidates**

- Ensures fair and unbiased evaluations

Understanding the Generations in the Workplace

Available % Labor Market	Skilled Trades%	Baby Boomers 1946-64		Gen X 1965-80		Millennials 1981-96		Gen Z 1997-2012	
		7-9% Declining	**25%**	33% Declining	**30%**	35% Growing	**25%**	24% Growing	**11%**
Traits		Optimistic, competitive, workaholic, team-oriented.		Flexible, informal, skeptical, independent.		Tech-savvy, collaborative, purpose-driven.		Digitally native, entrepreneurial, socially conscious.	
Work Ethic		Will continue working to save for retirement		Work smarter, not harder		Will work hard as long as needs are met		Will work hard as long as they can do it from home	
Communication		Whatever is most efficient, including phone calls and face-to-face.		Whatever is most efficient, including phone calls and face-to-face.		Digital, social media, instant messaging.		Texting, video chats, virtual collaboration.	
Learning		In Person		Self directed, practical learning		Social Learners Microlearning and gamification		Microlearning, independent learning	
Feedback		Annually, in person		Quarterly, in person or online		Constantly, in person or online		Constantly, online only	
Technology		Moderate		Proficient		Excellent		Advanced	

Are we ready for Gen Z?
Gen Z has entered the market and is here to stay. Creating an environment where they can thrive will be crucial in reducing turnover - flexible scheduling, purpose driven work, empowerment and growth are at the top of what matters most in this group.

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Goals of Successful Onboarding

1. Accelerate Time to Productivity

- Equip new hires with the tools, knowledge, and resources they need to contribute quickly.

- Clarify job expectations, workflows, and performance standards early.

2. Boost Employee Engagement & Retention

- Create a welcoming experience that fosters belonging and connection.

- Engaged employees are more likely to stay long term.

3. Clarify Roles and Responsibilities

- Ensure employees fully understand their job duties, team dynamics, and where they fit into the organization's mission.

4. Build Relationships & Networks

- Facilitate introductions to coworkers, leaders, and key partners.

- Promote collaboration and reduce feelings of isolation.

5. Reinforce Company Culture & Values

- Help new hires understand and live the company's mission, values, and behavioral expectations.

- Share stories, traditions, and examples that bring culture to life.

6. Ensure Compliance and Policy Awareness

- Review important policies, safety standards, and legal requirements.

- Confirm all required documents and trainings are completed.

7. Support Confidence and Belonging

- Build new hires' confidence in their role and team.

- Show that they are valued and supported from day one.

Prepare, Prepare, Prepare!

1. Prepare Before Day One

- Set up email, get equipment, and assign access to all systems needed to do their job
- Inform team of the new hire's arrival
- Provide handbook, policies, internal resources, manuals, contacts

2. Create a Structured First Week Plan

- Schedule training, intro meeting, and job shadowing
- Include social time and breaks to reduce overwhelm – team lunch!

3. Assign a Mentor

- Helps new hires acclimate faster
- Encourages early engagement and connection

4. Introduce Company Culture and Values

- Share mission, vision, and workplace norms
- Lead with examples and storytelling

5. Clarify Role Expectations

- Review goals, responsibilities, and success metrics
- Discuss short- and long-term priorities

6. Encourage Feedback and Questions

- Hold regular check-ins
  - Daily first week, weekly first month, monthly thereafter
- Ask what's going well and where they need support

Purpose and Focus of Coaching

- Enhances individual performance and fosters team growth through intentional guidance and support

- Build trust through frequent and consistent 1:1 conversations

- Set clear goals aligned with team and organizational priorities

- Provide feedback regularly, constructive and supportive

- Develop shared goals and team identity

- Foster accountability and ownership

Proven Benefits of Effective Coaching

- Creates positive and high-performing team environment

- Improves Performance
  - Targets specific areas for growth and improvement
  - Increases productivity and efficiency

- Boosts Higher Engagement, Retention, and Motivation
  - Employees feel valued and supported
  - Encourages ownership and accountability

- Enhances Communication
  - Reduces misunderstandings and conflict
  - Encourages open dialogue

Tips for Success

- Listen more than you speak

- Celebrate progress and wins

- Adapt coaching style to individual needs

- Integrate development into everyday work

- Be clear and consistent in the guidance you give

- Increase personal interaction & listening

Documentation

- Did it happen? If its not documented, it didn't!

- Don't overthink documentation, an email recap counts as documentation

- Timeliness is essential with documentation!

Documentation Best Practices

🔍 **1. Be Objective and Specific**

- Use facts: Focus on observable behaviors and outcomes, not personal opinions or assumptions.

- Provide specific examples: Include dates, times, projects, or tasks related to the performance.

📅 **2. Document Regularly, Not Just Annually**

- Keep ongoing notes throughout the year.

- Use check-ins, 1:1s, and project updates as documentation opportunities.

🧩 **3. Align with Job Expectations and Goals**

- Compare performance to the employee's job description, goals, or company core competencies.

- Helps ensure fairness and consistency.

📈 **4. Capture Both Positive and Negative Feedback**

- Document achievements and strengths, not just issues.

- Helps balance the record and shows an accurate picture of employee performance.

💬 **5. Include Employee Input**

- Summarize discussions from performance conversations and include employee responses.

- Shows engagement and can reveal different perspectives.

🔄 **6. Use a Consistent Format**

- Create a template or standard system (e.g., performance log, shared file, HRIS notes).

- Include:
  - Date of event
  - Description of performance
  - Impact on team or business
  - Next steps (if any)

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Documentation Best Practices

⚠️ **7. Be Timely**

- Document soon after an event to ensure accuracy.

- Timely notes are more credible if referenced later.

✅ **8. Follow Legal and Ethical Guidelines**

- Avoid discriminatory language.

- Stick to work-related performance only.

- Be mindful that documents may be used in disciplinary or legal actions.

🛠️ **9. Tie to Development and Coaching**

- Note training needs, growth areas, and any coaching provided.

- Helps build a case for promotions, support, or improvement plans.

📁 **10. Store Securely and Confidentially**

- Keep in a secure system or personnel file.

- Limit access to only appropriate leaders and HR professionals.

- Do not discuss with other employees!

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- **Career Advancement Opportunities:** Limited pathways for progression can lead employees to seek opportunities elsewhere.
- **Company Culture:** A lack of supportive and inclusive work environments contributes to dissatisfaction.
- **Recognition and Workload:** Insufficient acknowledgment of efforts and excessive workloads can result in burnout.
- **Work Flexibility:** Rigid schedules may not align with employees' personal needs, prompting them to leave.

BUSINESS

Gen Z workers training to become plumbers, electricians as they lose faith in college degrees

By Taylor Herzlich
Published Oct. 1, 2024, 11:37 a.m. ET

85 Comments

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Offboarding Best Practices – Voluntary Resignations

1. Plan Ahead

- Create a documented offboarding checklist.

- Prepare final paperwork: termination letter, COBRA/benefits info, final paycheck (if required) and final pay requirements.

- Identify knowledge transfer needs early.

2. Communicate Transparently

- Notify the team appropriately and professionally.

- Clarify last working day and transition plan.

3. Conduct an Exit Interview

- Use structured questions to gather feedback.

- Focus on culture, management, workload, and areas of improvement.

4. Recover Company Assets

- Collect tools, laptops, phones, badges, uniforms, documents, etc.

- Disable system access and transfer email/phone access securely and on last day

5. Ensure Knowledge Transfer

- Document key duties, contacts, processes.

- Arrange time for knowledge handoff to team or replacement.

6. Update Records & Systems

- Update systems, directories and workflows.

- Process final pay, unused PTO, and benefits.

7. Reinforce Confidentiality

- Review non-competes and data privacy expectations.

- Remind about post-employment obligations (if applicable).

8. Celebrate and Show Appreciation

- Acknowledge the employee's contributions.

- Offer a farewell note, card, or small gathering if appropriate.

Offboarding Best Practices – Involuntary Terminations

1. Prepare Thoroughly

- Review performance documentation
- Review with HR/legal to understand risk
- Prepare final paperwork: termination letter, COBRA/benefits info, and final pay requirements.

2. Schedule Thoughtfully

- Hold the meeting early in the day, if possible
- Choose a private, neutral space with limited disruptions.
- Include a witness (second leader or HR).

3. Stay Direct, Respectful, and Brief

- Start with a clear statement: "We are ending your employment effective today."
- Avoid debating or over-explaining.
- Speak calmly and give the person space to process.

4. Clarify Key Details

- Cover next steps: final paycheck, benefits, return of equipment, and timeline for exit.
- Review access cutoffs (email, systems).
- Offer support resources: EAP, career transition services (if applicable).

5. Manage Emotions with Empathy

- Stay professional even if the person is emotional or upset.
- Listen without defensiveness, but do not engage in justifications or arguments.

6. Maintain Safety and Dignity

- Monitor for emotional or behavioral risks.
- Decide if they will leave immediately or have time to gather belongings.
- Escort discreetly if needed; avoid public exits when possible.

7. Document the Conversation

- Note who was present, what was said, and how the employee responded.
- Store documentation securely in their personnel file.

8. Communicate Internally Afterward

- Notify the team with a neutral, factual message.
- Redistribute responsibilities and update directories/system access promptly.

Best Ways for Small Companies to Access HR Resources

1. HR Outsourcing Services (HRO)

- ✅ *Best for:* End-to-end HR support without hiring in-house.

- 📦 Services: Compliance, hiring, onboarding, handbooks, policies, benefits.

- 💡 Examples: Bambee, Gusto HR, Justworks, ADP HR services.

2. PEOs (Professional Employer Organizations)

- ✅ *Best for:* Co-employment model with full HR infrastructure.

- 💼 Handles payroll, benefits, workers' comp, HR compliance.

- 💡 Examples: Insperity, TriNet, Rippling PEO, Paychex PEO.

3. HR Consultants or Freelancers

- ✅ *Best for:* Project-based or part-time HR help (e.g., handbook, hiring).

- 🔍 Find via: LinkedIn, Upwork, HR consulting firms, local SHRM chapters.

4. HR Software Platforms

- ✅ *Best for:* Automating core HR tasks like onboarding, payroll, time tracking.

- 💻 Tools: Gusto, BambooHR, Zenefits, Rippling, Deel (for global teams).

5. Local SHRM Chapters & HR Associations

- ✅ *Best for:* Free/low-cost education, templates, and expert networking.

- 🧠 Access job descriptions, compliance updates, policy templates.

- 🔍 Search: www.shrm.org/community/chapters

6. Small Business Development Centers (SBDCs)

- ✅ *Best for:* Free HR help from government-supported advisors.

- 💡 Services include: Hiring support, compliance, workforce planning.

- 🔍 Find your local SBDC

Best Ways for Small Companies to Access HR Resources

7. State & Local Business Resources

- ✅ *Best for:* Industry-specific and legal HR guidance.

- 📄 Resources from: Department of Labor, local Chambers of Commerce, workforce boards.

8. Online HR Resource Libraries

- ✅ *Best for:* DIY forms, templates, and compliance checklists.

- 💡 Examples:
  - Society for Human Resource Management: https://www.shrm.org/
  - Score – Small Business Support: https://www.score.org/
  - Zenefits & BambooHR blogs
  - Trainual for documentation templates

THANK YOU