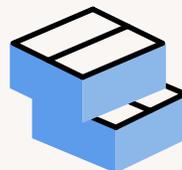


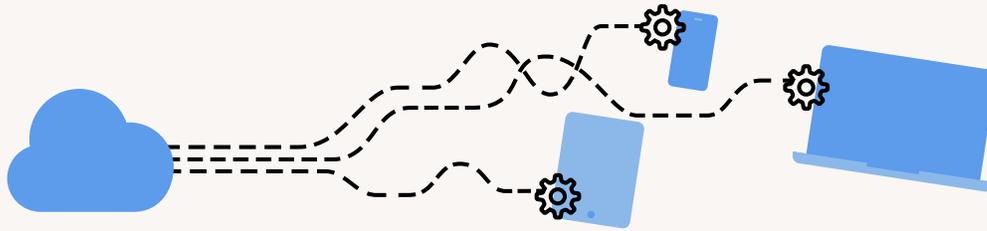
# Onboarding/Offboarding for Beginners

Increase employee retention, goodwill and productivity.

*Multiple studies have shown that quality onboarding and offboarding can increase goodwill, retention and productivity. How does your process measure up?*

In this beginner guide, we address why you should consider the employee experience from their first to last day of work to their last, including workflows and best practices for your processes, and how to establish or improve your reputation with the smoothest onboarding/offboarding experiences.





## Onboarding: increasingly important in employee retention

Your organization's onboarding process is the first thing a new employee learns about you. And it can set the tone for the new hire's entire experience with your company.

### Onboarding has far-reaching effects

According to Gallup's [State of the American Workplace](#) study, "employees make judgments and form opinions about their organization every single day — from the first day. Initial impressions matter."<sup>1</sup> In fact, those who feel their onboarding experience was less than optimal feel and show less engagement with their employers. Unengaged employees are unproductive and — ultimately — exiting employees.<sup>2</sup>

### Effective onboarding increases productivity and retention

[A Brandon Hall Group study](#) commissioned by Glassdoor discovered that organizations with a strong onboarding process improve new hire retention by an astonishing 82% and productivity by more than 70%. Companies with weak onboarding programs, according to the report, lose the confidence of their candidates and are more likely to lose these individuals in the first year.<sup>3</sup>

Those are some astounding numbers. And yet only 12% of employees strongly agree that their organization does a great job onboarding new employees. There's quite a bit of room for improvement.<sup>4</sup>

### A strong onboarding process can give organizations an edge

In our increasingly competitive workplace, attracting and retaining the most skilled workers around the globe is something that organizations cannot afford to treat lightly. Paying close attention to the onboarding experience has the potential to give organizations a competitive edge.

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1. "State of the American Workplace," p. 37, © Gallup 2017

2. Ibid, p. 18

3. "The True Cost of a Bad Hire," p. 12, ©2015 Brandon Hall Group; licensed for distribution by Glassdoor

4. Ibid, p. 36

## Offboarding: a safe, clean exit and increased goodwill

Often neglected by organizations, careful and smooth offboarding is crucial for keeping your organization and its data safe, encouraging your current employees' productivity and fostering goodwill with the exiting employee.

### Strong offboarding helps your organization's reputation

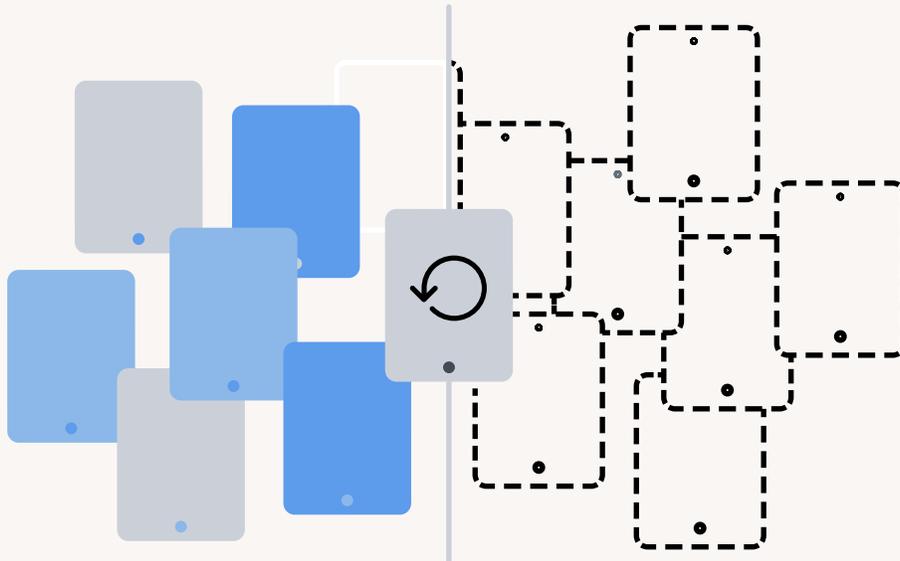
This helps your reputation as a company — especially among prospective hires, who search review sites to gain information on how a company operates and view comments from former employees.

### Effective offboarding is crucial for security

[A survey by identity provider OneLogin](#) revealed that more than 50% of ex-employees still had access to corporate applications, and that failure to deprovision employees has caused a data breach at 20% of the companies surveyed.<sup>5</sup>

### Ineffective offboarding is expensive

A hasty and neglected offboarding process also affects the bottom line, not only in the risk of costly breach cleanup but also in wasted spending through unused application licenses.



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5. New Research from OneLogin Finds over 50% of Ex-Employees Still Have Access to Corporate Applications, press release, OneLogin, 2017

# Onboarding and offboarding workflows and best practices

## Onboarding

[According to Forbes magazine](#), in 2021 the percentage of employees working exclusively remotely will double. And by 2025, an estimated 70% of the workforce will be working remotely at least five days a month.<sup>6</sup> This means that, increasingly, the onboarding experience is either entirely or at least partially remote.

### Offer remote, zero-touch onboarding

In order to put your best foot forward, organizations must assume that streamlining an onboarding process will include remote options. This means instituting a zero-touch deployment strategy that includes not only the full integration of your new hire into your company's existing IT strategy, but also includes training, communication information and access to company resources.

### Onboarding preparation workflow

#### 1. Sign up for Apple Business Manager and managed Apple IDs

Using Apple Business Manager — a free service from Apple — to create a company-wide zero-touch device deployment strategy is the first step toward a smooth and effective onboarding process. When a new hire powers on for the first time, regardless of the employee's location, Apple Business Manager tells the Mac, iPad or iPhone to automatically enroll into the organization's mobile device management (MDM) solution.

#### 2. Combine with a powerful MDM solution

Apple Business Manager, when paired with an enterprise management solution like Jamf Pro or Jamf Now, allows organizations to be fully in charge of the setup and management of an employee's Apple ID. Employees can also benefit from managed Apple IDs for access to more collaboration tools or as user enrollment on personally owned devices.

#### 3. Configure settings and enrollment customization

Using a combination of configuration profiles, policies, scripts and smart targeting, use your MDM solution to really customize the new employee experience. Remember to include HR in these settings; employees need access to productivity tools, sure. But they might also need an introduction video, tutorials, or access to other resources. There are powerful ways to use Apple's enrollment customizations to build informative workflows and to incorporate Jamf Marketplace solutions for an exceptional user experience.

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6. "This Is the Future Of Remote Work In 2021," Caroline Castrillon, Forbes, Dec 27, 2020



## Jamf Marketplace Solutions

If you're trying to build an onboarding process that helps new users feel comfortable, informed and part of the process, there are tools in the [Jamf Marketplace](#) which provide videos, forms, progress indicators and more to end-users during those first minutes while their Mac is setting itself up. We encourage you to explore solutions [DEPNotify](#), [Mac@IBM Enrollment App](#), [Splashbuddy](#) and [Octory](#) to create truly customized — even interactive — workflows.



### 4. Purchase the hardware

Increasingly, Apple is the preferred choice of new employees given the option—by a 3-to-1 margin. Order Apple hardware through Apple or an authorized Apple reseller and assign devices for enrollment through Apple Business Manager.

### 5. Deploy

Send shrink-wrapped Apple devices directly to employees, whether in the office or working remotely. The employee unboxes and turns on the machine, and the device enrolls into management automatically. If you've set up the experience well, the employee will go through a guided experience that not only gets them up to speed on HR details, benefit access, and training documentation but also gives them all the tools they need to start their job off immediately.

## The right tools for the job

If you're using a powerful MDM solution such as Jamf, the standard in Apple enterprise management, new hires will become instantly connected to their work resources including mail, VPN and productivity apps.

Make sure you select an MDM solution that offers a quick way for remote and in-office employees to immediately find and download their favorite apps or other critical resources without a need to call IT, such as Jamf's Self Service app: a free curated app portal available to every end-user in the organization.

For a bit more detail on zero-touch employee onboarding, [watch our webinar "The Definitive Guide to Technology Onboarding."](#)

And if using an MDM isn't something your company is comfortable doing on your own, there are Jamf-managed service providers (MSPs) that can do the heavy lifting for you. For example, some MSPs, such as Electric.ai's product [Turbine](#), that specializes in enhanced onboarding that automates and combines the IT and HR decision-making and technical process. Learn more about Electric.ai and their [enhanced employee onboarding](#).



## Offboarding

All good things come to an end, and it is inevitable that employees will at some point need to exit your organization. As outlined earlier, the proper offboarding process is crucial for your organization's security, reputation and continuity.

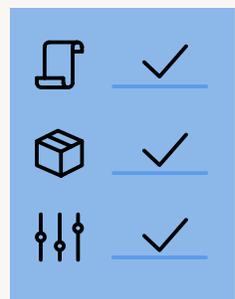
### Leave a good last impression

It's important that, in addition to the technical checklist below, you also communicate clearly and quickly to exiting employees what they need to do and how to do it, and that in addition to completing all paperwork, you conduct an exit interview. Exit interviews are often overlooked by companies, but they are important. From an exit interview, you can get valuable information on how to improve the employee experience at your company from a source that is free to be very honest. This will also lay the foundation for goodwill and even open the door for employees to come back someday.

### Offboarding checklist

Here's what you'll need to do when an employee leaves the company to secure company data and assets:

- Revoke access from your identity provider (IDP)/single sign-on provider (SSO); if your organization uses Jamf Connect, this process will prevent the exiting employee from logging in again
- Close any associated accounts
- Retrieve any licenses
- Restrict access to company devices
  - Reclaim company devices: the exiting employee can drop off the device or mail it back.
  - Unenroll any devices that the employee owned themselves as part of a BYOD program: wipe and unmanage the device remotely.



## Automate the technical details

That's a lot of detail to keep track of! Because the security side of offboarding is so detailed, it is important to automate this process as much as possible. Automation allows for consistency, eliminates errors and allows processes to be upgraded company wide.

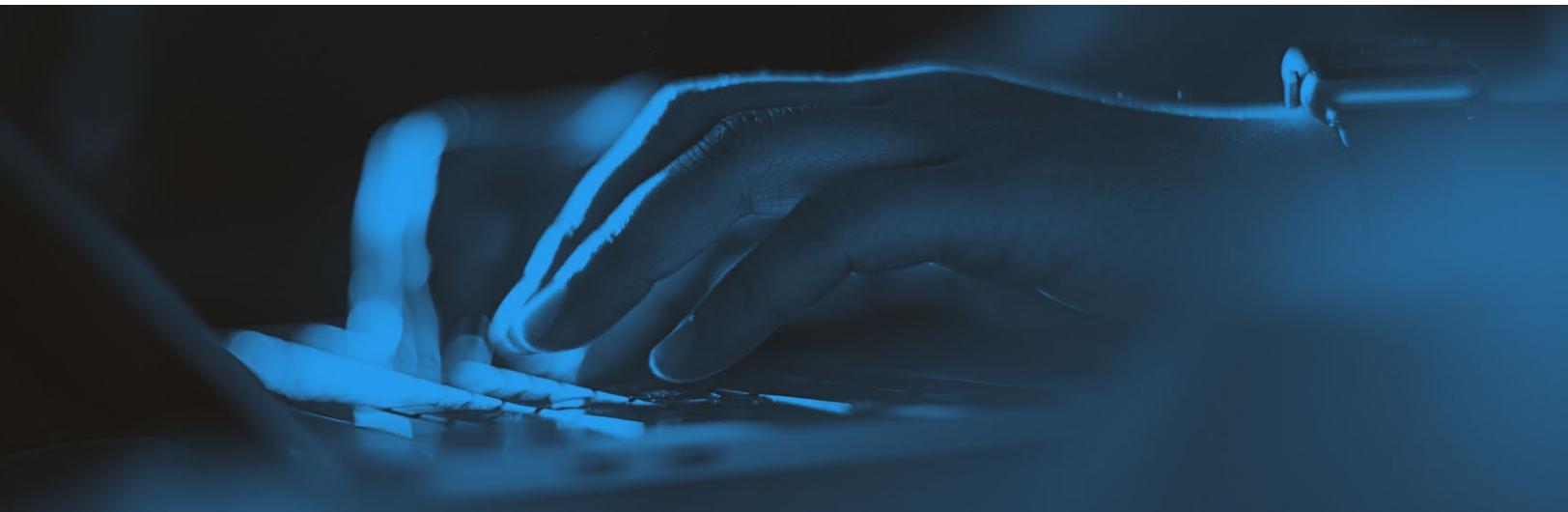
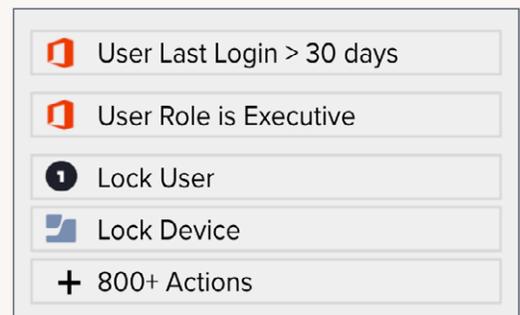
There are a number of ways that your organization can go about this process, depending on your company and the specific circumstances.

You can offer a user-initiated process for exiting employees that deploys all of the above steps automatically using Jamf Pro or another MDM solution; Jamf's Self-Service is one way to do this. You can also initiate this process through IT.

If you're using Jamf Pro, it's as easy as navigating to the device in inventory, then to management commands. That's where you lock and wipe the computer.

## Jamf Marketplace Solutions

To create this automated experience, you'll need to know some scripting and webhooks, as well as how to work with your MDM solution's API. Alternatively, there are tools in the Jamf Marketplace that are built to assist with the offboarding process and create advanced workflows, like BetterCloud. BetterCloud helps IT and security teams manage and secure applications through centralized and automated operations. Integrations allow an organization to automatically remove employee access to cloud services and SaaS apps while locking or wiping their Jamf Pro-managed Apple devices as part of an automated offboarding process.





## Re-set and re-provision your hardware

With Jamf's zero-touch deployment, a new user will have no access to information from the previous employee. You can customize enrollment with Cloud IDP with Jamf Connect, and have a provisioned local account from those credentials. It will authorize the new user and ensure that the old user no longer has access.

For specific scripts and step-by-step instructions on this process when using Jamf solutions, please read ["Reinstall a clean macOS with one button."](#)

## What next?

Hopefully, we've helped you to understand the importance of a well-designed onboarding and offboarding process, as well as pointed you in the right direction to find out how to do it.

If you aren't an expert on scripting or webhooks, Jamf's Professional Services offers customizable services that include these workflows. We offer world-class support, including a 24–7 option via premium support packages. You also have access to the Jamf Nation community: an online forum to more than 100,000 Apple-focused IT pros. It's free.

If you're already a Jamf customer and you'd like help with onboarding and offboarding, please contact your Jamf representative.

Want to get started with Jamf solutions?

[Request Trial](#)

Request a free trial of Jamf or contact your preferred Apple reseller.

