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## No HR Manager? No Problem!

DEMYSTIFYING THE  
EMPLOYEE LIFE CYCLE

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HOST



Special Thanks to Seattle Good  
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## Here's What We'll Cover Today!

### "The Employee Life Cycle"

*The Key Stages of Every Employee's Journey*

1. HR Strategy
2. Attracting an Employee
3. Recruiting
4. Onboarding
5. Learning and Development
6. Reward, Recognition & Compensation
7. Progression & Performance
8. Retention/Exit/Offboard

# Employee Life Cycle



## 1 Strategy

*Strategic Workforce Planning Based on Your Company's Goals*

## Clear Mission, Values, & DEI Framework



### Clear Mission

Why are you in business?

### Clear Values

What do you stand for?

### Clear Framework for Diversity, Equity, & Inclusion

What is your strategy for attracting a diverse workforce and operating an equitable and inclusive workplace?

## 2 Attract

*Being an Appealing & Inclusive Employer*

## Be An Appealing & Inclusive Employer

### Raise Brand Awareness

- Participate in local Chamber events
- Have your managers attend seminars and conferences regularly in your industry
- Seek out speaking opportunities
- Be a regular contributor on websites and blogs
- Company social media: LinkedIn, FB, Insta, TikTok...

### Become Known for Having a Great Company Culture

- The employee remains the most valuable and convincing promoter for any company.
- By having a fantastic company culture, you only increase the chances that your existing employees will regularly tell others about how great it is to work within your organization.

### Offer Attractive Benefits & Compensation

- Having strong compensation is very appealing to find top talent in your industry.
- You don't need to pay the most to attract the best, but don't pay the least.
- If you can not afford medical & 401K, seek out opportunities to provide softer benefits, such as team lunches, birthdays off, spot bonuses, EAP, etc.

## 3 Recruit

*Enabling all talent to successfully apply*



## Recruiting Activities

**Finding the right fit!**

- Write Great Job Descriptions
- Consider using an Applicant Tracking System (ATS)
- Advertise open positions far and wide
- Make it easy to apply
- Video Screenings (pre-interview, 15-20 min)
- Interviews (always in-person, 1 hour)
- Ensuring the "Right Fit"
- Making a Job Offer

## Advertising & Screening

### Post Jobs Online

- Post on sites such as Indeed, LinkedIn, Poached, Craigslist, etc.
- Use a recruiting tool like the one Gusto offers to post to 100 free job boards
- Internal postings
- Employee incentives
- Check for applicants Daily
- Reach back out same day



### Job Screenings

- **Video** is generally best to get the most complete sense of a person
- **Phone** is best to get a quick gauge and invite in
- **Generally OK to text** candidates these days
- Screening to your company values and the position
- Keeping records of your screening notes
- Language considerations
- Confirm to lessen ghosts



## Pre-Interview Activities

- Read the candidate's application, resume, and cover letter
- Review the screening notes (if this was done by someone else)
- Talk with any interview partners about how you want the day to go
- Set-up the workplace to let staff know that interview is taking place
- Write standard questions to ensure equity and reduce bias



## What you Cannot/Can Ask

### Illegal to Ask

- Age or genetic information
- Birthplace, country of origin or citizenship
- Disability
- Gender, sex or sexual orientation
- Marital status, family, or pregnancy
- Race, color, or ethnicity
- Religion



### OK to Ask

- Are you eligible to work in the United States?
- Are you able to perform the essential functions of the job?
- Are you able to work the hours that are scheduled for this position?
- Do you have reliable transportation?

## In-Person Interview



- Learn all about the candidate. You are trying to determine how closely they match what you're looking for, so talk about everything that you have time for.
- Share more about the position that they have applied for and about the Company. Talk about the culture and what makes a good employee. Be passionate and share about your mission.
- Take good notes complete your feedback form (first impressions, work experience, availability, etc.)



## Wrapping Up the Interview

### While they're there:

- Thank the candidate for their time!
- Be present and respectful
- Let them know what the next steps are (references, background check, more interviews, etc.)

### When they're gone:

- Finish your notes on the interview
- Discuss the interview and feedback with fellow staff
- Call them and make a job offer in a timely manner
- If you must reject, do so kindly and swiftly





## 4 Onboard

*Setting your talent up for success and preparing the team to receive a new team member!*

## Onboarding a New Employee

### Sending a Job Offer:

- As soon as you can, send a written Job Offer
- Check References, Run Background Checks
- Collect Signed Job Offer

### Set New Employee Up in Systems:

- Follow a Checklist
- Payroll System
- Communication System
- Attendance System
- Collecting Needed Paperwork



## 5 Learning & Development

*All talent represented and included*

## Training

- Create an initial Training Schedule and share this with the employee
- New Employee Orientation
- Send training materials if needed
- Introduce and welcome the new employee to the team!
- Written Employee Handbook that clearly defines policies and expectations
- Training is ONGOING and FOREVER when you are committed to continuous improvement



# Build a Culture of Continuous Improvement

- Build a culture of continuous improvement
- Normalize experimentation and failure; if people don't **Learn to Fail, they will Fail to Learn** and **your company will fail to innovate**
- You do this by teaching people to stop and fix what bugs them
- Always learning, always improving, always getting better.



## Harassment Training

- Each person employed at the Company has the right to work in an environment free of discrimination and harassment.
- Your Company should commit to providing a workplace free from discrimination in all forms, including harassment based on race, color, religion, gender, sexual orientation, national origin, age, genetic information, disability, gender identity, veteran status, or any other status or characteristic protected by applicable local, state, or federal law.
- The Company should take seriously its obligation to maintain a workplace free of harassment and discrimination. Violations of this policy should never be tolerated.
- Remember: harassment is harassment if the person experiencing it (the comment, etc.) experiences it as harassment
- Be familiar with your company's Sexual Harassment Policy (if you don't have one, write one)
- Further training at Gusto.com (Gusto Learning), [EasyLlama.com](https://www.easyllama.com), Traliant, etc.

## 6 Rewards & Recognition

*Nurturing, rewarding, and reinforcing the behaviors you want to see repeated.*



## Rewards & Recognition

**Understand your employees and what motivates them**

- Essential for applying the correct rewards & recognition; takes some time but well worth it!

**Examples:**

- Spot Bonuses (gift cards)
- Employee of the Month
- Praise (public or private)
- Paid Time Off
- Volunteer Events/Philanthropy
- Financial incentives/bonuses
- Benefits
- Promotions

# Benefits!

## Required by Law:

- Sick Time (1 hour per 40 hours worked)
- Worker's Compensation Insurance
- Paid Family Medical Leave Insurance
- Unemployment Insurance

## Not Required by Law, but expected by most if you can afford it:

- The Essentials
  - Paid Time Off
  - Medical (have a good PPO and HMO option, and/or Gold, Silver, & Bronze levels)
  - Dental and Vision Insurance
- 401K
- Life Insurance

## Other Considerations

- Matching charitable contributions
- Financial training/education
- Gym membership or other wellness benefits
- Tuition reimbursement
- Pet insurance
- Employee Assistance Program (EAP)
- Child care

## 7 Talent Management

*All talent performance management consistent*



## Tips for Managing Employees

- Have a service mindset - your employees are your customers
- Be a good listener (listen more than you speak)
- Everyone has different strengths & areas for growth - your job is to identify those and help strengthen the areas for growth
- Set performance expectations early on & bring up issues up early on, don't brush issues under the rug
- Be clear, direct and respectful

## Tips for Managing Employees

- Have regular check-ins with your employees where you get a chance to meet with them without distractions.
- Find out what matters to your employees and support them in reaching their goals.
- Periodically ask your employees for feedback about yourself as a manager.
- Periodically ask your employees why they stay and what may cause them to consider leaving - this is called a "Stay Interview" and can be incorporated into 1:1s or career development conversations



# Performance Reviews

Performance Reviews can vary from company-to-company, but here are some common considerations:

1. Who is driving the process, the employee or the manager?
  - a. Employee-driven: Employees can initiate the review process whenever they think they are ready for feedback, a promotion, or a raise.
  - b. Manager-driven: Managers can initiate the review process on a particular schedule or when they think the employee is ready
  - c. HR-supported: If you are lucky to have an HR person, have them send out reminders to the manager, provide the forms, and support the process
2. Who should be included in providing feedback?
  - a. 360 reviews typically include the supervisor, peers, and the employee. If the person is a manager, they might also include bottom-up feedback.
  - b. A more basic form of review is by the supervisor to the employee.

# Coaching



- Coaching is the act of helping others perform better - whether to correct poor performance, improve skills or target the development of new skills for high performers.
- Core coaching skills include - active listening, questioning, observing, building rapport, offering constructive analysis and feedback.
- Coaching is personalized and is usually done one-on-one and over a period of time, and with a specific objective in mind.
- Coaching equips people with the tools, knowledge, and opportunities they need to fully develop themselves to be effective in their commitment to themselves, the company, and their work.

# Confidentiality

It's important that when an employee feels safe enough to approach you with either a job related or personal issue that we honor them by keeping their concerns as confidential as we can. Sometimes, in order to best support the employee, a manager may need to share information with HR, the owner, or other managers - but verbally ask them for permission to share. The following are topics that should mandatorily be reported and investigated:

- Harassment of any kind (sexual, physical, mental)
- Requests for accommodations for health reasons
- Prohibited conduct (stealing, threats, etc.)
- Poor attitude or performance issues that have not improved with coaching

# Progressive Discipline

- Process for addressing conduct or performance that does not meet expected and communicated policies or standards with the objective of correcting it in the earliest stages.
- Increasingly formal steps for dealing with problems related to employee conduct or performance.
- Provide an employee with a second or third chance to course correct.
- Some actions/behaviors so egregious may skip steps (theft, violence)
- Apply consistently and set clear expectations
- Document the process in your Employee Handbook along with example reasons why it would be used

## Stages of Progressive Discipline

1. **Verbal warning** - written documentation in file; set expectations if no improvement
2. **Written documentation** - Consider a clearly defined written Performance Improvement Plan, in file
3. **Final warning** - If appropriate, document in writing to the employee, placed in file
4. **Termination** - when a situation is unresolvable or egregious behavior (theft, violence)



# Documentation

## Informal

- Document verbal corrections in writing

## Formal

- Performance Improvement Plans
- Sit down with employee to discuss
- Provide a written copy to the employee

## Terminations

- Consider creating a Termination Report - not provided to employee, but for UI filings that may occur; also for internal documentation in case the employee reapplies
- For involuntary exits, write a termination letter to the employee explaining why they are being let go, last day, and any relevant benefits or pay info.



# The Essentials

- Operate your business with integrity - do what you say you're going to do, when you say you're going to do it, and if you can't, clean it up with the employee, make a new promise and keep it.
- Listen to the feedback your employees have, the questions they ask, and empower them to make positive changes in your workplace. They are YOUR customers; treat them like you would treat a paying customer; care about their input.
- Your employees have lives - enable work/life balance; don't text your hourly-paid employees at all hour (or your salaried
- Provide your employees with the tools they need to do their job and to do it well; focus on continuous improvement. Show Your Appreciation.



# Why People Quit

Some of the top reasons for employee turnover include:

- Lack of career development opportunities
- Lack of employee engagement
- Poor company culture
- Lack of or poor employee benefits and/or compensation
- Disagreements with co-workers or managers - 75% quit because of managers
- No clear business goals or direction
- Employees feel like their honest feedback or thoughts aren't considered



## 8 Retain/Exit (Offboard)

*Learn from and manage exits.*



## Offboarding Steps

Use a Checklist :)

### Prior-to-last day (if they quit with notice)

- Ask for written notice of resignation
- Schedule Exit Interview
- Communicate with the Team
- Email instructions for last day
- Communicate about benefits, last pay date, return of company equipment

### After last day:

- Remove from Payroll
- Remove from all systems



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## Q&A

LET'S CHAT!



Thanks Again!