

*Targeted Benchmarking on  
Off Boarding*



CAHRS Partners have the opportunity to benchmark with other partner companies on HR topics of interest. The benchmarking is typically conducted with 5-7 other CAHRS Partners selected by the company that initiated the request. The CAHRS office identifies the appropriate connections at selected companies and the benchmarking company then schedules 1:1 phone calls to explore their questions.

Examples of recent requests include: Sponsorship Initiatives, Organization Designs and Structures, Diversity Metrics, Talent Management Practices, Competency Models and a variety of HR Policy Questions (i.e. Relocation, Cost of Living, Airline Mile Usage, etc.).

CAHRS partners find this more qualitative approach to benchmarking very valuable for revealing novel insights and practices, as well as for building their network. At the conclusion of the process, the benchmarking company shares an anonymized summary of their findings with the participating companies and CAHRS, who then makes them available so all partners can benefit from the learning.



## Company A: Professional Services Industry

**Topics of interest:** Voluntary & Involuntary Terminations: Understanding processes to include downstream impacts to partners/vendors (benefits, unemployment, etc.)

Question	Response
<p><b>Separation Strategy and Off boarding Process &amp; Roles</b></p> <ul style="list-style-type: none"> <li>▪ Walk me through your (involuntary &amp; voluntary) termination process and interdependencies?</li> <li>▪ What is the role of the Manager and HR Business Partner in the process?</li> <li>▪ Who handles, does it require approval?</li> </ul>	<p><b>Voluntary Separation</b></p> <ul style="list-style-type: none"> <li>• The company has a self-separation process for voluntary terminations (new process). The process kicks off when the employee notifies of their separation through a portal. The notification is then transmitted to the Location HR team. Alternatively, the EE can contact their location HR Lead directly and they are a point person for questions during and after departure.</li> <li>• Employees are then provided access to an Exit Portal which is a reference site for both voluntary/involuntary separations. The portal houses all the necessary resources and has instructions for a smooth transition to off board. This includes benefits info, Cobra, stock purchase, holdings, housing, promissory notes, transferring mobile phone, time reporting tips and reminders to complete activities. Departing employees still have access to portions of the portal after separation but are moved to an Alumni site.</li> <li>• Company has a call center team located in India (work NA hours). They receive general inquiries. All inquiries get funneled to HR Location team.</li> <li>• Exit interviews are conducted by a team in San Antonio, TX. All employee levels are interviewed and asked probing questions to get to the heart of why people are leaving. Managing Director interviews are handled by HR Business Partner.</li> <li>• The Location HR Lead is responsible for processing the separation and a compliance tracker is in place to make sure employee is terminated correctly. The separation generates the deactivation downstream. Voluntary termination takes between 2-3 weeks. Ideally company likes for employees to give 2-3 weeks and most do. Very few give less than that and employees rarely notify more than 3 weeks.</li> </ul>

## Company A: Professional Services Industry (Continued)

**Topics of interest:** Voluntary & Involuntary Terminations: Understanding processes to include downstream impacts to partners/vendors (benefits, unemployment, etc.)

Question	Response
<p><b>Separation Strategy and Off boarding Process &amp; Roles</b></p> <ul style="list-style-type: none"> <li>▪ Walk me through your (involuntary &amp; voluntary) termination process and interdependencies?</li> <li>▪ What is the role of the Manager and HR Business Partner in the process?</li> <li>▪ Who handles, does it require approval?</li> </ul>	<p><b>Involuntary Separation (Performance &amp; RIF)</b></p> <ul style="list-style-type: none"> <li>• Involuntary separations are conducted throughout the year. The business leads the process with HR Business Partner.</li> <li>• Performance based- Performance based- HR Business Partner (HRBP) informs Employee Relations (ER) employee is not performing. HRBP is heavily involved with ER and employee. If employee does not improve, the Business Lead would be involved with HR leadership &amp; ER to make decision to separate. Business Lead will communicate to employee of decision and sometimes they want HR in the meeting. After notification, HRBP will then work with the Local HR Lead through next steps to provide separation package, benefits and process the separation. Severance offer for performances are based on employee level and typically are between 2-4 weeks of salary (i.e. directors are offered more).</li> <li>• RIF- The Business Lead and HR Business Partner (HRBP) lead the process. Upon the decision to proceed with RIF, the Local HR Lead is notified. They sign off and plan communication accordingly. Business Lead pulls together employees to provide a general notice. Both HRBP and Local HR Lead attend these meetings. In communication they will explain the timeframe to employees. After general notification, local HR will reach out and talk about individual situation (package details etc.). An in-house tool is used to calculate severance. Employee gets 2 releases, signed release, 7-days sign another form release.</li> <li>• Employees working outside of the U.S. (OUS) sign a letter &amp; Employee acknowledges electronically that they received it.</li> <li>• Call center will receive the calls but will not have individual specifics. However, they can answer general quick questions, such as payroll and how severance was calculated etc.</li> </ul>
<p><b>Benefits</b></p> <ul style="list-style-type: none"> <li>▪ Are there any services / benefits you offer for separating / separated employee?</li> <li>▪ What are those (placement service etc.)?</li> </ul>	<p><b>Voluntary &amp; Involuntary:</b></p> <p>The company provides a flyer to employees that contains placement/outplacement services based on level in which they offer upfront. Employees initiate support for career services after termination. In addition, they provide technology allowance to help employee to purchase a laptop. It is usually a lump sum paid in final earnings (taxed). Employees can use this money to buy anything technology related (hardware or software).</p>

## Company B: Financial Industry

**Topics of interest:** Voluntary & Involuntary Terminations: Understanding processes to include downstream impacts to partners/vendors (benefits, unemployment, etc.)

Question	Response
<p data-bbox="142 457 698 489"><b>Separation Strategy and Off boarding Process</b></p> <ul data-bbox="99 531 625 703" style="list-style-type: none"><li data-bbox="99 531 625 632">▪ Walk me through your (involuntary &amp; voluntary) termination process and interdependencies?</li><li data-bbox="99 674 446 703">▪ Does it vary by region?</li></ul>	<p data-bbox="751 457 1291 489"><b>Involuntary Separations – Reduction in force</b></p> <ul data-bbox="751 531 1528 1297" style="list-style-type: none"><li data-bbox="751 531 1528 947">• The process begins with forecasting deployments months in advance and scheduling the events during specific cycles throughout the year. This is a new process as we didn't want employees to have job security concerns; therefore, we no longer accept one-off job eliminations. After the forecasting plans are received, updates are captured through monthly check-ins with business leader and HR Business Partner (HRBP). We collaborate with various parts of the organization to build an execution strategy for each RIF (see Participants &amp; Roles). This includes managing internal and public communications to preserve company reputation.</li><li data-bbox="751 982 1528 1119">• The process does vary between the U.S. and countries outside of the U.S. (OUS). This is something we're trying to improve but differing country laws and policies make it challenging.</li><li data-bbox="751 1155 1528 1297">• The U.S. has a central team to support the process, HRBP is involved with business leaders, whereas their involvement is limited for OUS. The OUS process is managed by country (central process team not applicable).</li></ul> <p data-bbox="751 1333 1023 1365"><b>Voluntary Separation:</b></p> <ul data-bbox="751 1371 1528 1581" style="list-style-type: none"><li data-bbox="751 1371 1528 1434">• Employees can self-separate with the ability to future date retirements.</li><li data-bbox="751 1440 1528 1581">• The self-separation application's data feeds to multiple department systems. This has resulted with an automated process for shutting off employee access to company systems and deactivation of badge access to sites.</li></ul>

## Company B: Financial Industry (Continued)

**Topics of interest:** Voluntary & Involuntary Terminations: Understanding processes to include downstream impacts to partners/vendors (benefits, unemployment, etc.)

Question	Response
<p style="text-align: center;"><b>Participants &amp; Roles</b></p> <ul style="list-style-type: none"> <li>▪ What is the role of the Manager and HR Business Partner in the process?</li> <li>▪ Who handles, does it require approval?</li> <li>▪ What works well? What doesn't?</li> </ul>	<p><b>Involuntary Separations RIFs:</b></p> <ul style="list-style-type: none"> <li>• Participants: Business, HR Business Partners, Central Processing Team, Business Advisors, Employee Relations (ER), Corporate Communications, Outplacement Services Payroll and Talent Engagement.</li> <li>• The business leader and HRBP provide forecasting. Senior Leadership determines precautions and approval.</li> <li>• The Central Processing team performs quality checks and works with ER to comply with regulations, such as flagging event if it meets the Federal and State Worker Adjustment and Retraining Notification act (WARN). Provides final findings to HRPB and Business Leaders.</li> <li>• Central Processing team additional responsibilities: manager communication training, severance agreements, executing off boarding tasks (i.e. processing terminations).</li> <li>• Managers responsible for conducting employee notifications. Upon completion, severance agreements are executed.</li> <li>• Outplacement vendor responsible for career services, (interview coaching and resume writing).</li> </ul> <p><b>Technology Info:</b></p> <ul style="list-style-type: none"> <li>○ Technology: the use of widget via employee on desktops to provide exit checklists and resources.</li> <li>○ RIF Tool used to perform severance calculations, employee database (developed in-house).</li> </ul> <p><b>What's working well,</b></p> <ul style="list-style-type: none"> <li>○ The new business forecasting process.</li> <li>○ RIF tool, widgets and having a systematic approach to "shutting front door access".</li> </ul> <p><b>What's doesn't work well:</b></p> <ul style="list-style-type: none"> <li>○ We're not providing the separation agreement at time of notification, which triggers abundance of questions in terms of how much severance is offered.</li> </ul>
<p style="text-align: center;"><b>Benefits</b></p> <ul style="list-style-type: none"> <li>▪ Are there any services / benefits you offer for separating / separated employee?</li> <li>▪ What are those (placement service etc.)?</li> </ul>	<p><b>Involuntary:</b></p> <ul style="list-style-type: none"> <li>• Subsidize Cobra based on years of service, cover 100+ days</li> <li>• More paid days off due to Covid-19</li> <li>• Restricted Stock</li> <li>• Outplacement/Career services – vendor, Lee Harrison Hecht</li> </ul> <p><b>Voluntary:</b></p> <ul style="list-style-type: none"> <li>• Guidance on investments</li> <li>• Bereavement support services</li> <li>• Separations due to death - benefits to significant other valued up to 5k.</li> </ul>