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Onboarding and Offboarding Employees: Why Getting it Right Matters

In the age of remote working and no-handshake protocols, exemplary welcomes and farewells may seem harder than ever. But just as routines and cultures have changed, so have best practices for orienting new employees, and, as a manager, it's important...

Paul McDonald • May. 10, 2021



The first few weeks on the job are critical for your employees. Among the many impressions they are getting and giving, CPAs will be assessing what their future at your firm may look like.

When employee onboarding is done well, new recruits settle in quickly, become productive in their roles and begin to develop feelings of loyalty towards the organization. When it's not done well, you're likely to get the opposite results. In other words, first impressions matter a great deal.

Last impressions are important, too. A bungled or non-existent offboarding process can leave departed staff feeling confused or even bitter — and if the employee resigned, it could leave management in the dark as to why.

In the age of remote working and no-handshake protocols, exemplary welcomes and farewells may seem harder than ever. But just as routines and cultures have changed, so have best practices for orienting new employees, and, as a manager, it's important to know what they are. Here's how you can make your onboarding and offboarding processes work for both you and your hires.

Tips for remote onboarding

Continued competition for in-demand accounting professionals and the increasing ease of [remote recruitment](#) mean firms can and should look further afield to find the best talent. If you can recruit, interview and hire someone without meeting them in person, you can onboard them too, so long as you follow a few simple rules:

- 1. Get started immediately** — Your onboarding strategy should begin the day your new hire accepts the job. Firing off a quick email with a bunch of attachments for them to read or sign conveys the idea that they're low on your list of priorities. On the other hand, making time for a one-on-one video call creates a strong first impression, demonstrates company values and shows that you are excited about what your recruit has to offer.
- 2. Prepare for a well-organized start** — Make sure your new recruits have the equipment they need, that login permissions for your cloud-based ERP or tax systems are set up, and that you provide a structured itinerary for the first week of work. Seemingly small details can make a big difference. They can help newcomers feel welcomed and valued, rather than [confused and frustrated](#).
- 3. Assign a buddy** — While managers play a critical role in shaping an accountant's first few weeks, assigning an onboarding buddy can ensure the experience is

positive and productive, especially if the role will continue to be remote. Buddies help most when they know the work the new hire will be doing. For example, if your CPA will be briefing senior managers regularly on the organization's financial status, assign them a buddy who has fulfilled this role in the past and who knows the ins and outs of company culture.

4. **Ask for feedback** — Once your new CPA has found their feet, ask them to fill in a new hire survey. Keep it brief (you don't want to overwhelm them with paperwork) but invite them to share their experience while it's still fresh in their mind. Not only will this help to fine tune your onboarding process, but it's a chance to address any early concerns.
5. **Set performance goals** — It's critical for new employees to fully understand their responsibilities and have a clear picture of what you expect of them. Flexibility is crucial when managing remote workers, but it has its limits — CPAs simply cannot fail to meet their client's government-mandated deadlines for tax filing, for example. Setting out specific, measurable, achievable goals for the first 30, 60 and 90 days will give them added incentive to succeed, while enabling you to review progress and identify training needs.
6. **Make time for personal connection** — A key aspect of onboarding is bonding with the team, but it can be challenging for remote workers. Try to factor in time for social interactions whether through online casual conversations or virtual team-building activities to minimize feelings of isolation and to help build trust.
7. **Emphasize healthy work habits** — Highlighting the importance of work-life balance is especially important in a remote work environment. Without commutes to bookend their days, CPAs may put in extra-long hours in order to prove themselves and could end up [suffering from burnout](#). To avoid this, emphasize to your recruit that you value great work and productivity over hours logged, and then agree some boundaries with the whole team so that your remote hire feels comfortable logging off.

Don't make offboarding an afterthought

Whether through resignation, termination or retirement, some of your CPAs will inevitably move on. How you manage their departure will make the difference between burning bridges and turning the employee into a brand champion and company alumnus. Whether it's an in-person exit or departure from a distance, try to make sure you:

● **Learn important lessons** — Exit interviews can be quite useful for finding out how your organization can improve. Employees often spot problems that managers miss, and departing staff may be more willing to discuss these issues than the colleagues they're leaving behind. For example, remote accountants might reveal frustrations about the level of support they received from your IT department. A quick call to your IT counterpart could be all it takes to resolve this problem, which might otherwise have festered undetected.

● **Include them in hiring their replacement** — Consider involving departing accountants in the selection of their successor. When they see that their contribution is still valued, they are more likely to pass on their knowledge and facilitate a smooth handover.

● **Leave the door open** — Maintaining good relations with former employees paves the road for “boomerang rehires.” After leaving your organization, qualified CPAs and accounting professionals will gain new knowledge and grow in their careers. Striking a positive final note means there's more of a chance they may one day return to your company, bringing those new and improved skills with them.

● **Protect the firm's reputation** — Accomplished accounting professionals will inevitably research online reviews of your firm when deciding where they want to work. Don't give departing employees a reason to make negative comments on social media. Treating staff with care and respect as they prepare to leave your firm encourages them to become ambassadors rather than antagonists.

An employee should experience a continuous process of performance reviews, feedback and support. But how this process starts and ends can leave deep and lasting impressions. By fine tuning their transition processes, accountancy firms create a positive workplace culture that sets their staff up for success, both now and in the future.

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Paul McDonald is senior executive director at talent solutions and recruiting firm [Robert Half](#). He writes and speaks frequently on hiring, workplace, leadership and career-management topics. Over the course of more than 35 years in the staffing industry, McDonald has advised thousands of company leaders and job seekers on how to hire and get hired.

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