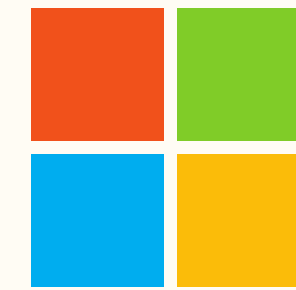# TABLE OF CONTENTS

PROBLEM ONE

- TTD's current technical **onboarding/offboarding** functions
- **Employee confusion** with company **platforms** during **onboarding**
- During employee **offboarding**, **two** central questions arise
  - What to do with employees access to company platforms and materials?
  - How can we improve the transition from exiting member to new member?

PROBLEM TWO

Platform Access Levels

- TTD's technical **platforms** are **not managed** by **one** singular department
    - **Editing** access **levels** has become **problematic** for the **SI** team
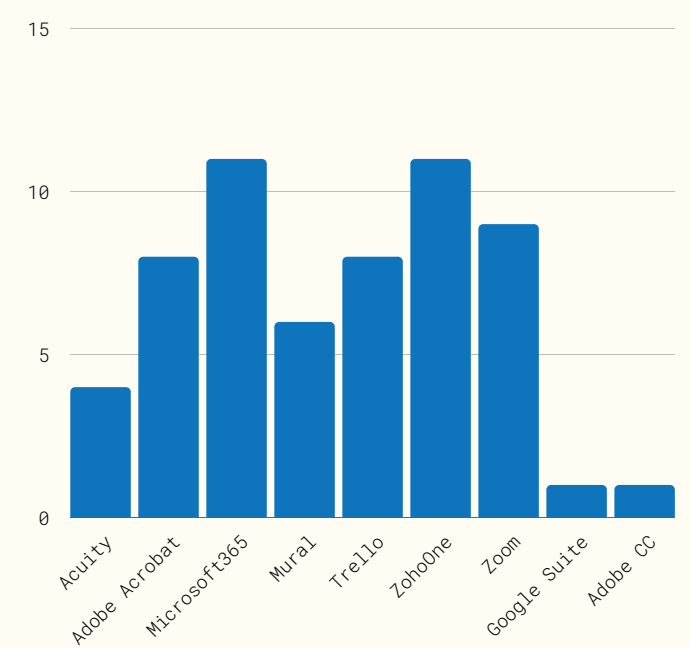- **Access** level **issue** during offboarding

Application Redundancies

- **Decentralized** nature of TTD's technical **platforms** have also brought issues of **application redundancies** and interdepartmental **miscommunication**

PROJECT PROCESS

STAFF INTERVIEWS AND SURVEYS

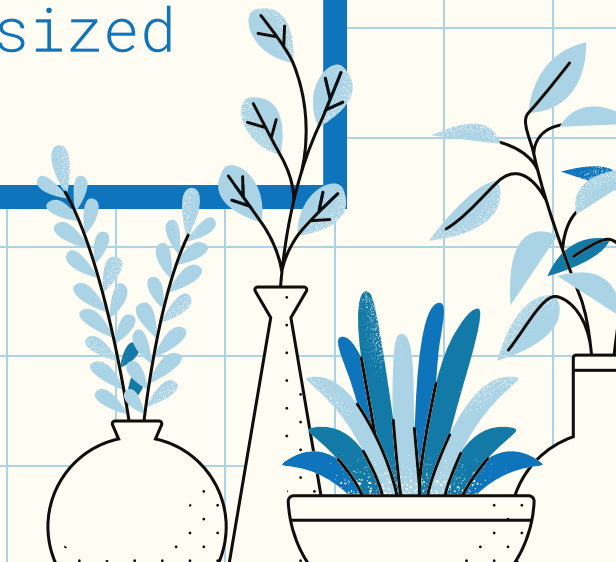- Interviews with all department directors & additional relevant staff

PEER INTERVIEWS

- **Michigan Non-Profit Association**
  - Beckie Hawes-Baggett
- **Global Detroit**
  - Nonprofit Entreprises at Work (NEW)
  - Society for Human Resource Management (SHRM)
- **SHARE Detroit**
- NextEnergy
- BUILD Institute
- Global Talent Accelerator

PLATFORM ANALYSIS

- **Apps** available to **TTD** via **WSU emails**
  - Adobe Suite
  - Canvas
  - Microsoft Office 365
  - Zoom
- **Interviews** and surveys **showed** application **redundancies**
- **Zoho One** platform **analysis**, emphasized **Problem 2**

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PLATFORM INSTRUCTION

Additional aspect of orientation involving walk-throughs of widely used company-wide platforms

INCLUDING:

- *Tours of **modes of communication***
  - *Emphasis on org-wide **Teams channels***
- *General instructional **introduction to Zoho***
  - *Tour of most **frequently used** applications*
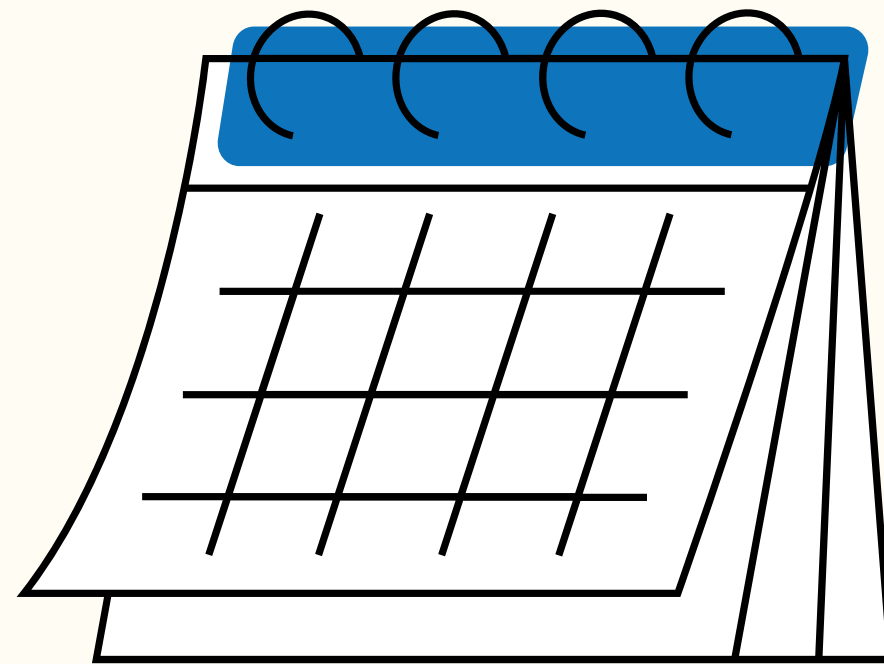
ONBOARDING RECOMMENDATION

A detailed timeline for an employee's first few weeks at TT
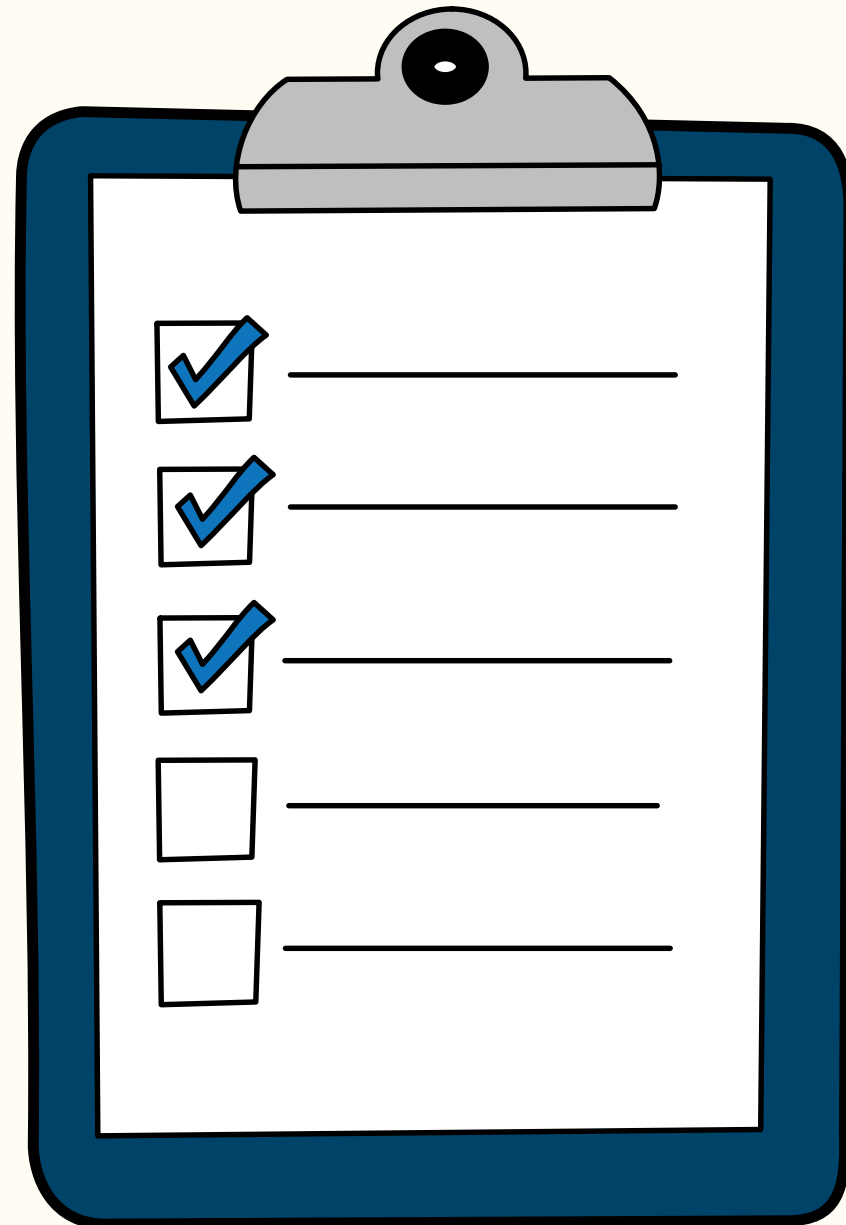
CONTENTS OF TIMELINE:

- *Details the **onboarding stages** for the employee **to expect***
- ***Important meetings** to anticipate*
- ***Who/Where to check in** with at various checkpoints*
  - *Newly onboarded employee can **reference** the timeline **to seek out help***

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INITIAL TECH. CHECKLIST

A checklist **distributed to** the corresponding **department director before the arrival** of a new employee

GOALS:

- *Broken down by tasks for SI/HR/C&IT*
- *Involves all resources available to the employee*
- *Supervisor can check off necessary platforms*
- *Zoho applications will require specification of access level*

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ZOHO ONE TRAINING

Easily **accessible Zoho One tutorials** for employees to utilize as a **resource** whenever desired

WHAT THIS ENTAILS:

- *General overview of Zoho usage*
  - *Walkthrough of Zoho dashboard and functionalities*
- *Application specific tutorials*
  - *Most popular applications*
  - *Additional ones upon request*
- *Utilize Zoho to the same extent*
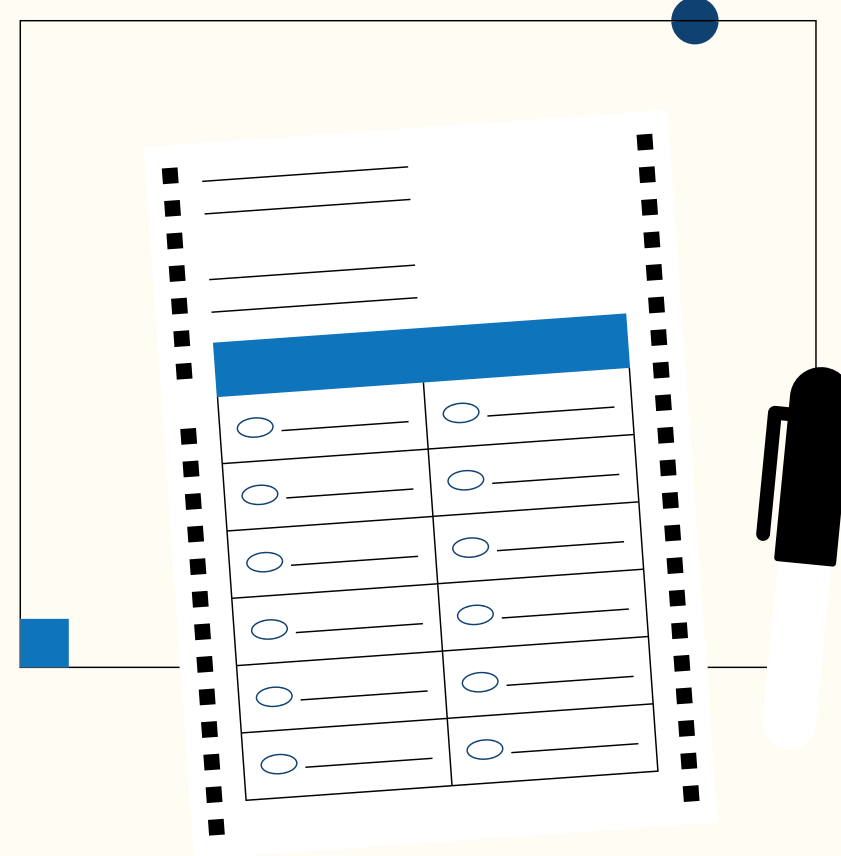
APPLICABLE RESOURCES

A standardized provisioning **request form** that **ensures the validity** of the request.

GOALS:

- *Creates a **centralized** place to place requests in a **streamlined** manner*
- *Only **accessible to department directors** and sent directly to appropriate figure(s) for help*
- *For reference upon **offboarding***

PROVISIONING REQUEST FORM

Please send this request form to your supervisor for approval.

Name		Department	
Supervisor		Role	

Please check off any applications that you would like access to listed below:

Zoho One Applications:

☐ **Books** - Online accounting software that manages your finances, automates business workflows, and helps you work collectively across departments

☐ **Bookings** - Syncs your calendars while letting customers self-schedule and pay for appointments

☐ **Backstage** - Event management software that empowers event organizers to plan and run conferences, meetups, and product launches

☐ **Campaigns** - Email marketing toolkit that helps you to create responsive designs, customize messages, deliver emails to inboxes, trigger automated workflows, and connect with new customers

☐ **CRM** - Online Sales CRM software that manages our program participants, donors, sponsors and funders

☐ **Forms** - Software used to create forms that are shareable online and can efficiently manage your data received from clients

☐ **Projects** - Project management software that helps you plan your projects, track work efficiently, and collaborate with your team

☐ **Sign** - Digitally sign documents yourself and email the signed copies to others, get documents signed on the spot, or send documents to request signatures

☐ **Sites** - Create your website quick and easy by choosing from a collection of customizable templates

☐ **Sprints** - An agile project management tool that helps teams adopt an iterative and collaborative approach to work

☐ **Survey** - Create custom surveys, collect real-time data, and analyze responses with reports, charts and graphs

If you would like to have beyond a user access level to any of these applications please specify for which and why:

Other Applications:

☐ Trello
☐ EE YouTube Channel
☐ Zoom
☐ Adobe Acrobat Pro
☐ Adobe Creative Cloud
☐ Acuity
☐ Stripe or Dex/Forte

Please provide a brief explanation if you are requesting access to a platform that is not usually given for this user's role:

A **company-wide interactive page** with a description of each employee's **primary responsibilities**

GOALS:

- *Used for **seeking assistance***
  - *Find **who is responsible for assisting** with a specific change*
- *Defines **'normal' usage** for an employee*
- ***Accountability** for implementers of change*
- *Strict **distinction in roles***

OFFBOARDING TRANSITION PLAN

Exiting Member Communication

- Occurs upon the department director's **notification of offboarding**
- **Teams channels** with relevant employees
- Delegate **unattended responsibilities**
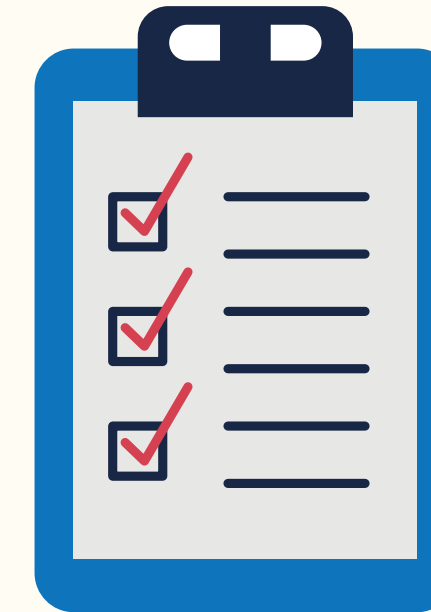
Offboarding Checklist

- **Refer to onboarding checklist** documentation
- Programs that need to have **access revoked** from
- **Affected team members** may **add tasks** based on prior discussion

Removing Redundancies
- Currently, **multiple** platform **redundancies** exist between **TTD** and **WSU**.
- **Removing** the **excess** accounts could **fix** the SI team's **budget issues**

Organized Routing Checklist
- Similar to the **provisioning request form**, however more **organized** and **detailed**
- Every **employee** will have **access** to this **checklist**

Individualized Platform Training
- Beyond the proposed easily **accessible Zoho tutorials** for TTD employees, **a training program** for other applications within the company suite
- Could drastically **save SI time in the long run**

NEW MEMBER ONBOARDING

- Two-step onboarding process
  - Platform provisioning via **checklist**
  - **Broader orientation** involving
- **Detailed timeline** resource
  - **Specificity** regarding with who and how onboarding processes will take place

EMPLOYEE RESOURCES

- **Zoho One training**
  - General & specific
- Standardized **provisioning request form** submitted through department directors
- **Resources** for:
  - Who to **ask for help**
  - Lists of **responsibilities** of each department/individual

RECOMMENDATION OVERVIEW

EXITING MEMBER OFFBOARDING

- Proposed **Transition** Plan
  - Offboarding Checklist
  - Teams Channel and Improved Communication

LONG TERM CHANGES

- Removing **redundant** applications from TTD **technical platform**
- New **routing** provisioning **request** form
- Detailed **training** for necessary **applications** within **TTD's platform**

QUESTIONS

PROVISIONING REQUEST SUBMISSION FLOWCHART

Employee in need of assistance with access to an application

→

Employee submits the provisioning request form to their supervisor

→

Supervisor approves the request

—

The form is **automatically redirected** to the appropriate team based on the applications selected

→ SI

→ HR

→ C&IT

Access is granted to the requested destinations and the process is terminated

Supervisor denies request

↓

Process is terminated

*the teams can check the company-wide accountability chart for reference to define what would normally be used by this employee to mitigate unnecessary granting of access (e.g. Adobe Acrobat Pro for signatures, etc.)