



Optimizing IT Onboarding and Termination Processes

With many companies pausing their growth plans due to economic uncertainty, it's a great time to get your processes ready for growth when the opportunity returns. This is just a business cycle, and we've been here before. The long-term drivers for life science and technology innovation haven't changed. At some point, the up-cycle will start again. Streamlining and automating your new hire and termination processes in IT is a great place to start preparing.

One of the first impressions your new employee will have is receiving a computer and access to appropriate systems. The quality of this experience can set the tone for their ongoing job satisfaction and productivity. As hardware is ordered, cloud accounts are set up and system access is granted, there are many opportunities for mistakes, miscommunication, and frustration. An automated and well-designed process ensures that all needed information is captured and appropriate approvals are granted before work is started.

Criteria for a Reliable Onboarding Process



- New-hire requirements (entitlements for each role)
- Clear performance SLA and tracking tool
- A competent performer accountable for the results
- Flexible IT staff for hiring bursts
- Define setup for each application based on role
- Define standard computer setup based on role
- Hardware/software procurement and inventory process
- A (very) detailed IT onboarding checklist and instructions

Keeping Track of Apps/Online Services

With cloud apps exploding in popularity for enterprises, the complexity of managing them has ballooned. As companies grow, the number of 3rd party apps and services increases from dozens to hundreds. Some are freely available to all, and others are highly restricted. Details matter in managing this matrix. Documentation must include: the name of the business owner (decision maker) for this app, entitlements for various roles within the app, 3rd party contacts, renewal dates, etc

Termination Process

The reverse process of shutting off access and cleaning up after terminated employees is equally important, for security and compliance reasons. The timing of shutting off access should be scheduled to the exact minute. All necessary information must be well prepared. Once again, a detailed checklist is critical to avoid errors and omissions. Data is backed up, accounts are terminated, equipment is wiped and inventoried for

future use or e-wasted. An accurate asset inventory is clearly important. IT must have a record of all system logins and cloud apps the user accessed. A Single-Sign-On system is very useful here, allowing you to disable access to all systems and apps with a single action.

Standardize and Automate the Processes with an IT Portal

An IT portal is a great asset for standardizing processes and preventing errors. The typical flurry of follow-up emails can be largely avoided. Only authorized users will see the options for setting up new hires, buying equipment or preparing terminations. All required information and authorizations are managed by the system. Any changes to the process or forms are immediately implemented for everyone. This is also a handy place to add new processes and knowledge base articles in the future. On the back end, IT will have a much more detailed set of checklists and instructions to ensure accuracy and quality of execution.

The image shows a screenshot of an IT Request Service portal. The main interface displays 'Top Referenced Requests' with categories like Application, Computer Hardware, Human Resources, and Other. A 'Popular' overlay window is open, showing the 'Onboard a User' form. The form includes fields for First Name, Last Name, New Hire Details, Account and Access Details, Equipment Details, and Notes. It also has checkboxes for Application (Adobe Acrobat Pro, Adobe Illustrator, Email, CRM Suite, Slack, VPN, Zoom, Other) and a section for Shared Network/Cloud Folder Access. The form has 'Submit' and 'Cancel' buttons at the bottom.

About KalioTek

KalioTek's mission is to provide emerging and midsize life sciences and technology companies with a wide range of IT and security expertise in a flexible, affordable model. Since 2002 our team has provided consulting and managed services to hundreds of ambitious companies. Our technically savvy client base requires that we stay on top of IT and security technologies as they evolve and understand the solutions appropriate for growing organizations.

For more information or to inquire about how KalioTek can help your company with some of the solutions described above, contact us at 408.550.8007 or sales@kalioTek.com.