JOINER MOVER LEAVER

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JOINER-MOVER-LEAVER (JML)

Efficient management of the entire lifecycle of employees

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Background

All organisations – large, midsize, or small – across industry segments see people join, leave, as well as move between roles. The Joiner-Mover-Leaver (JML) process is an essential part of every organisation and is owned by HR departments.

As part of the process, the HR staff needs to interact with various teams and departments:

- Business, to ensure their users are onboarded and exit timely and seamlessly.
- IT, for access creation and management.
- Security, to ensure data security, compliance, and regulatory requirements.
- Third parties, for background verification and referrals.

The process is becoming even more complex with the increasing adoption of hybrid work models and multi-cloud IT infrastructure. These complexities make the JML process less streamlined and inefficient for people as well as costs.

This whitepaper details how a JML process can be streamlined to provide an efficient and secured environment. It describes the key processes as well as the technology architecture and components that can power an ideal JML process. It also covers how Simplex Services itself embarked on the journey of JML and the process and technology adopted therein.

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Process Flow

The Joiner-Mover-Leaver (JML) process, commonly employed by organisations, manages the entire lifecycle of employees, from recruitment and onboarding (Joiner), through internal changes or promotions (Mover), to their eventual departure from the company (Leaver).

Joiner Process

- The Joiner process begins when a candidate accepts a job offer and continues through their initial days or weeks at the company.
- Key activities involve completing new hire paperwork and orientation sessions.
- The HR department oversees the onboarding process, ensuring that new employees are equipped with the necessary resources along with the required access to integrate smoothly into the organisation on day one.

Mover Process

- The Mover process encompasses internal mobility, such as transfers, promotions, or adjustments in job responsibilities.
- Employees may transition to different teams, departments, or locations within the organisation.
- Managers and HR collaborate to facilitate a seamless transition by providing requisite access to new systems for employees transitioning into new roles.

Leaver Process

- The Leaver process manages the exit of employees from the organisation, whether due to resignation, retirement, or termination.
- Activities include conducting exit interviews, retrieving company assets, revoking the access to systems, and retain critical data.

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Stakeholders

The JML process involves various departments and stakeholders within an organisation, each playing a distinct role in managing different stages of the employee lifecycle.

Each department's involvement in the JML process is essential for ensuring compliance and efficiency as well as a positive employee experience throughout the employee lifecycle. Effective collaboration and communication among these departments are critical for successfully managing transitions while supporting organisational goals.

Human Resources (HR)

- **Joiner Process**: Sourcing candidates, conducting interviews, processing paperwork, and providing orientation and training.
- **Mover Process**: Coordinating with hiring managers and department heads to facilitate smooth transitions and ensure proper documentation.
- **Leaver Process**: Managing exit interviews, paperwork completion, return of company assets, and communication to relevant stakeholders.

Recruitment

- **Joiner Process**: Sourcing, screening, and selecting candidates for open positions and collaborating closely with HR to ensure a seamless transition from recruitment to onboarding. They also co-ordinate with third parties for background verification checks.

Managers and Supervisors

- **Joiner Process**: Selecting and onboarding of new hires and providing guidance, assigning tasks, and facilitating training to help new employees integrate into their teams.
- **Mover Process**: Overseeing internal transfers and promotions within their departments and assessing the skills and performance of employees, identifying development opportunities, and facilitating career advancement.
- **Leaver Process**: Conducting exit interviews, handling knowledge transfer, and initiating succession planning to ensure continuity and minimise disruptions caused by employee departures.

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IT

- **Joiner Process**: Setting up accounts, email addresses, and access permissions for new employees as well as providing technical support and training on company systems.
- **Mover Process**: Supporting internal moves by transferring access rights, updating systems, and ensuring continuity of IT services for employees transitioning to new roles.
- **Leaver Process**: Disabling accounts, revoking access privileges, and retrieving company devices from departing employees. They also assist in transferring data and files to successors as part of the offboarding process.

Employee Relations

- **Leaver Process**: Employee relations specialists conduct exit interviews, gather feedback from departing employees, and address any concerns or grievances raised during the offboarding process.

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Technology

Enablement

Technology plays a crucial role in streamlining the Joiner-Mover-Leaver (JML) process by automating tasks, improving communication, enhancing data accuracy, and providing better visibility into the employee lifecycle.

Integrated HR Software

- Allows for seamless management of the JML process from recruitment to offboarding.
- Centralised databases enable easy access to employee information, reducing the likelihood of data discrepancies.

Compliance Management Systems

- Ensures adherence to data protection regulations and company policies throughout the JML process.
- Automated compliance checks minimise the risk of non-compliance and associated penalties.

Workflow Automation

- Automates routine JML tasks such as sending welcome emails, scheduling training sessions, and updating HR records.
- Workflow automation reduces manual effort, minimises errors, and accelerates the overall process.

Self-Service Portals

- Allows employees to update personal information, access company policies, and submit leave requests.
- Empowers employees to manage their own information, reducing administrative overhead for HR teams.

Designing a technology solution for the Joiner-Mover-Leaver (JML) process involves aligning the solution with the needs of the business, users (employees, managers, HR professionals), and IT infrastructure.

Prioritise the needs and preferences of end-users to create an intuitive and user-friendly experience.

- **Business:** Enhances employee satisfaction and productivity, leading to better business outcomes.
- **User:** Improves user adoption and engagement with the technology solution.
- **IT:** Reduces support requests and training needs, easing the burden on IT staff.

Ensure seamless integration with existing systems and tools to enable data sharing and interoperability.

- **Business:** Improves efficiency by eliminating silos and enabling smooth data flow between different systems.
- **User:** Provides a unified experience by consolidating information and functionalities in a single interface.
- **IT:** Reduces complexity and maintenance efforts by leveraging existing infrastructure and data sources.

Design the solution to accommodate growth and changes in business requirements over time.

- **Business:** Supports organisational growth and agility, enabling the business to adapt to evolving needs.
- **User:** Ensures that the solution remains relevant and effective as the organisation scales or undergoes structural changes.
- **IT:** Facilitates easier management and maintenance of the technology solution, reducing scalability-related challenges.

Prioritise data security and compliance with regulatory requirements throughout the design and implementation process.

- **Business:** Mitigates the risk of data breaches and regulatory penalties, safeguarding the organisation's reputation and assets.
- **User:** Builds trust and confidence in the technology solution by protecting sensitive information and ensuring privacy.
- **IT:** Ensures that the solution meets security standards and can be effectively monitored and managed by IT security teams.

Leverage automation to streamline repetitive tasks and improve process efficiency.

- **Business:** Increases productivity and reduces operational costs by minimising manual effort and accelerating task completion.
- **User:** Enhances user experience by simplifying workflows and reducing administrative burden.
- **IT:** Optimises resource allocation and enhances IT efficiency by automating routine maintenance and support tasks.

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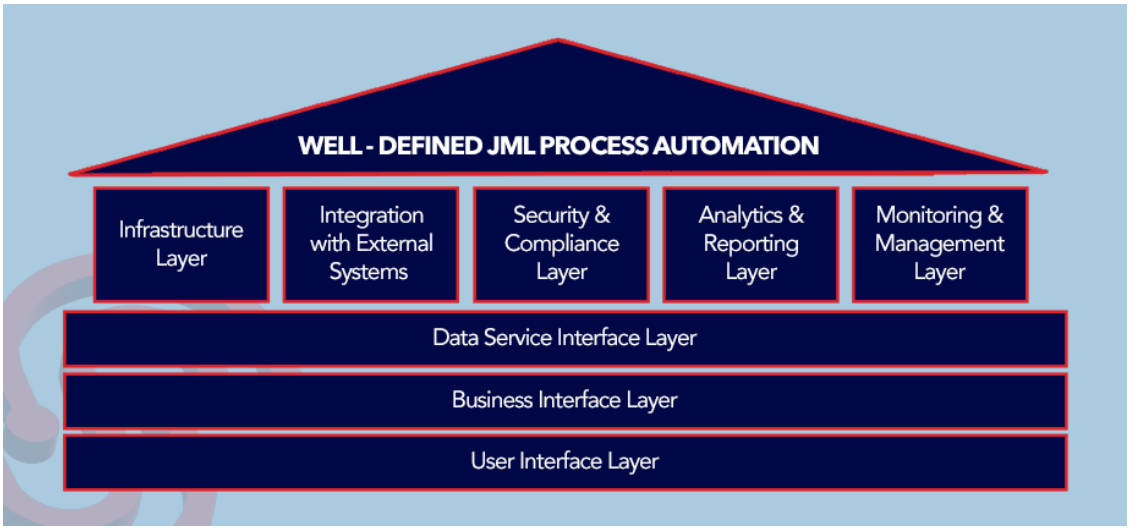
Architecture



USER INTERFACE LAYER

- **Employee Portal**: Provides a user-friendly interface for employees to access JML-related services, such as onboarding forms, employee profile data, and offboarding checklists.
- **Manager Dashboard**: Offers managers visibility into their team's JML statuses, allowing them to initiate internal transfers, approve leave requests, and perform changes to the data and request access to integrated apps.

BUSINESS LOGIC LAYER

- **Workflow Engine**: Orchestrates JML processes, automating the flow of tasks and approvals based on predefined rules and conditions.
- **Business Rules Engine**: Enforces organisational policies and compliance requirements, ensuring consistency and adherence to regulations throughout the JML lifecycle.

DATA SERVICES LAYER

- **Employee Database**: Stores employee data collected at various stages for processing as per the compliance needs.
- **Integration Services**: Facilitate seamless data exchange between the JML system and other HR systems using APIs to pull the data for processing or sharing with stakeholders for decision making.

INFRASTRUCTURE LAYER

- **Microsoft 365 Infrastructure**: Hosts the JML system utilising the Microsoft Power Platform to create required forms and workflows as needed.

INTEGRATION WITH EXTERNAL SYSTEMS

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- **HR Systems**: Integration with external HR system to provide data or pull information as needed, using email or API-based integration as applicable.
- **ITSM Systems**: Integration with ITSM tools to collect information or trigger workflows based on information received, via email, APIs, and custom integrations.

SECURITY & COMPLIANCE LAYER

- **Identity and Access Management (IAM)**: Manages user identities, authentication, and access control to safeguard sensitive employee information.
- **Data Encryption and Masking**: Protects data at rest and in transit using encryption techniques and data masking to comply with security and privacy regulations.

ANALYTICS & REPORTING LAYER

- **Data Warehouse**: Centralises employee data for reporting, analytics, and business using Microsoft Power BI and third-party tools.
- **Analytics Engine**: Processes and analyses JML data to generate insights, identify trends, and support decision-making using Power BI, PowerApps, and any third-party tools.

MONITORING & MANAGEMENT LAYER

- **Logging and Monitoring**: Monitors workflows to highlight any challenges during the execution of the workflow.
- **Alerting and Notification**: Notifies administrators and stakeholders of any changes and/or triggers alerts/notifications based on custom events.

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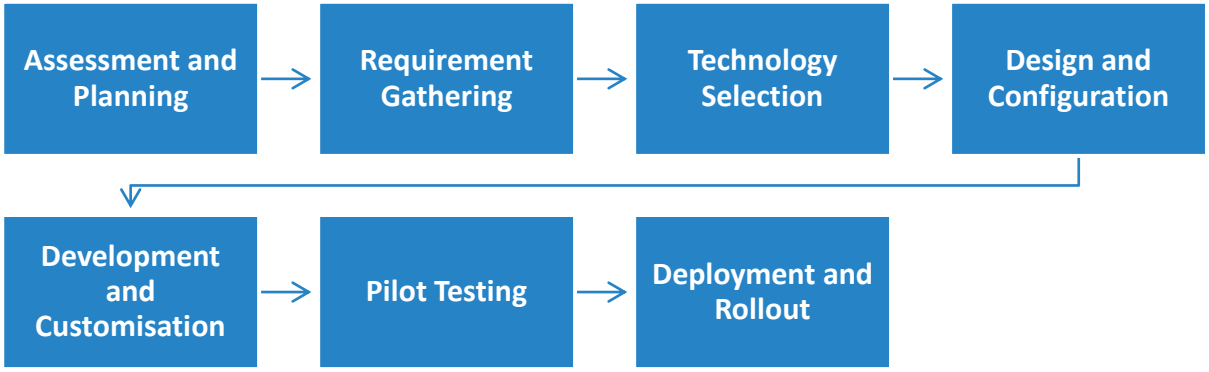
Implementation Framework



Assessment and Planning

- Conduct a comprehensive assessment of existing HR processes, systems, and pain points related to the JML lifecycle.
- Define objectives, success criteria, and key performance indicators (KPIs) for the JML implementation.
- Identify stakeholders, including HR professionals, IT personnel, managers, and employees, and involve them in the planning process.

Requirement Gathering

- Engage with stakeholders to gather requirements, preferences, and constraints for the JML solution.
- Document functional and non-functional requirements, including user roles and permissions, data security, integration needs, and scalability requirements.
- Prioritise requirements based on business value, urgency, and feasibility.

Technology Selection

- Identify the JML process and the systems involved.
- Agree on the integrations like email, API, etc. for the JML process automation.

Design and Configuration

- Prepare design for the JML solution, including system architecture, data models, workflows, user interfaces, and integration points.
- Design user-friendly interfaces and intuitive workflows to enhance the user experience and adoption.
- Configure the integration points with sample data.

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Development and Customisation

- Develop custom forms and workflows to extend or enhance the functionality of the JML process.
- Integrate third-party systems and tools with the JML solution to enable seamless data exchange and workflow orchestration.
- Test the developed components thoroughly to ensure functionality, reliability, and compatibility with existing systems.

Pilot Testing

- Conduct a pilot test of the JML solution with a small group of users or departments to validate its effectiveness and identify any issues or areas for improvement.
- Solicit feedback from pilot users and stakeholders to refine the solution and address any concerns or usability issues

Deployment and Rollout

- Deploy the JML solution to production environments, ensuring proper configuration, data migration, and integration with existing systems.
- Monitor system performance and user feedback during the initial rollout phase to identify and address any issues promptly.

AI Enhancements

Leveraging Artificial Intelligence (AI) can significantly enhance the Joiner-Mover-Leaver (JML) process by reducing the overall speed and achieving greater efficiency, improving the user experience and employee satisfaction, and increasing adoption for improved business outcomes.

AUTOMATED WORKFLOWS

- AI-powered workflow automation can streamline repetitive tasks within the JML process, such as document processing (auto populate data from documents uploaded), data entry (record updates from the forms), and task assignment (for access or ID creation).

- By automating these tasks, AI reduces manual effort, accelerates the overall process, and ensures consistency and accuracy.

CHATBOTS AND VIRTUAL ASSISTANTS

- AI-powered chatbots and virtual assistants can provide real-time support and guidance to employees throughout the JML process.

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- By answering questions, resolving issues, and offering personalised recommendations, chatbots enhance the user experience, reduce wait times, and increase self-service adoption.

INTELLIGENT AUTOMATION FOR OFFBOARDING

- AI-driven intelligent automation can streamline the offboarding process by generating personalised offboarding plans, coordinating exit interviews, and automating paperwork completion.
- By minimising administrative overhead and ensuring compliance, intelligent automation accelerates employee departures while maintaining a positive experience.

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Case Study

Simplex Services decided to implement the Joiner, Mover, and Leaver (JML) process automation within its organisation considering the company's constant growth in size.

The overall aim of this internal project was to implement and automate the Joiner-Mover-Leaver (JML) process within the organisation. Its primary objective was to efficiently manage and execute tasks in accordance with business compliance standards and minimising or eliminating the need for human intervention.

Whether fully automated or with optional human oversight, the system ensures seamless orchestration of JML procedures. By streamlining operations, it enhanced organisational efficiency, reduced errors, and ensured adherence to regulatory requirements. Ultimately, this solution empowers Simplex to navigate personnel transitions smoothly while maintaining strict compliance standards.

Here's how we went about it.

Assessment & Planning

- Conducted a comprehensive assessment of existing internal HR processes and systems and assessed the pain points related to the JML lifecycle.
- Defined objective success criteria and key performance indicators (KPIs) for the JML implementation.
- Identified internal stakeholders from the departments such as HR, IT, Security, et al as well as employees and set the expectations about the project.
- Current Tasks were assessed and checked its eligibility for automation which clearly outlined whether the requirement is matching to the set objective.

Requirement Gathering

- Engaged with stakeholders to gather requirements, preferences, and constraints for the JML solution.
- Documented functional and non-functional requirements, including user roles and permissions, data security, integration needs, and scalability requirements.
- Prioritised requirements based on business value urgency and feasibility.
- Once the existing workflows were received, the Business Analyst team chunked the workflows to tasks in each process. Tasks were then analysed to check its eligibility for automation and the

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automated workflow matching the requirement. This process clearly outlined whether the requirement matched to the set expectation of tasks that were eligible for automation.

Technology Selection

- Utilised the in-house capabilities in terms of technology tools leveraging Microsoft Power Platform tools such as Power Automate and Power Apps that offered unparalleled advantages within our Microsoft ecosystem.
- Through its robust suite of connectors, it helped in seamless integration and data flow within our internal environment. These connectors provide a reliable and efficient means of communication, surpassing the complexities often associated with traditional APIs when interfacing with third-party sources.
- Power Platform's interface and pre-built connectors help in development processes and enhance productivity. Moreover, by aligning with Microsoft's ecosystem, we benefit from synergies across various Microsoft products. Ultimately, our reliance on the Power Platform empowers us to deliver a scalable and agile solution.

Design & Configuration

- Prepared the design for the JML solution, including system architecture, data models, workflows, user interfaces, and integration points.
- Configured the customisation of logo, theme, and colours with respect to Simplex standards.
- Designed user-friendly interfaces and intuitive workflows to enhance the user experience and adoption.
- Configured the integrations with the HR system tool called Breathe HR to automate the flow trigger from the HR system for the appropriate JML process.
- Ensured seamless integration with Azure Active Directory (AD) (now called Microsoft Entra ID) for provisioning and de-provisioning of user Identities, emails, and license assignments with other access and authorisation rights based on user roles.

Development & Customisation

- Developed custom HR forms to get all the candidate details and validate the details through automation.
- Extended the automation workflows and enhance the functionality of the JML process.

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- Tested and developed components thoroughly to ensure functionality, reliability, and compatibility with existing HR and IT systems.
- By automating tasks such as access provision and licensing allotment, the occurrence of common human errors inherent in these processes can be mitigated. Through streamlined operations, the system minimises delays and inaccuracies, enhancing overall efficiency and productivity. By centralising and automating these critical tasks, the organisations can allocate resources more strategically and ensure compliance with precision.

Pilot Testing

- Conducted a pilot test of the JML solution with a small group of users within HR & IT department. It helped us to validate the workflow effectiveness and identify any issues within the automation process and areas for improvement.
- The Quality Assurance team reviewed the workflow. Feedback from the testing team was documented for further improvements in configuration and workflow process.
- Overall, this phase helped us to refine the solution and address any concerns or usability issues.

Deployment & Rollout

- Deployed the JML solution to production environment ensuring proper configuration, data migration, and integration with Breathe HR and Azure AD systems (now called Microsoft Entra ID).
- Monitored system performance and user feedback during the initial roll out phase to identify and address any issues promptly.
- Continuous improvement on the workflow and configuration based on the identified issues.

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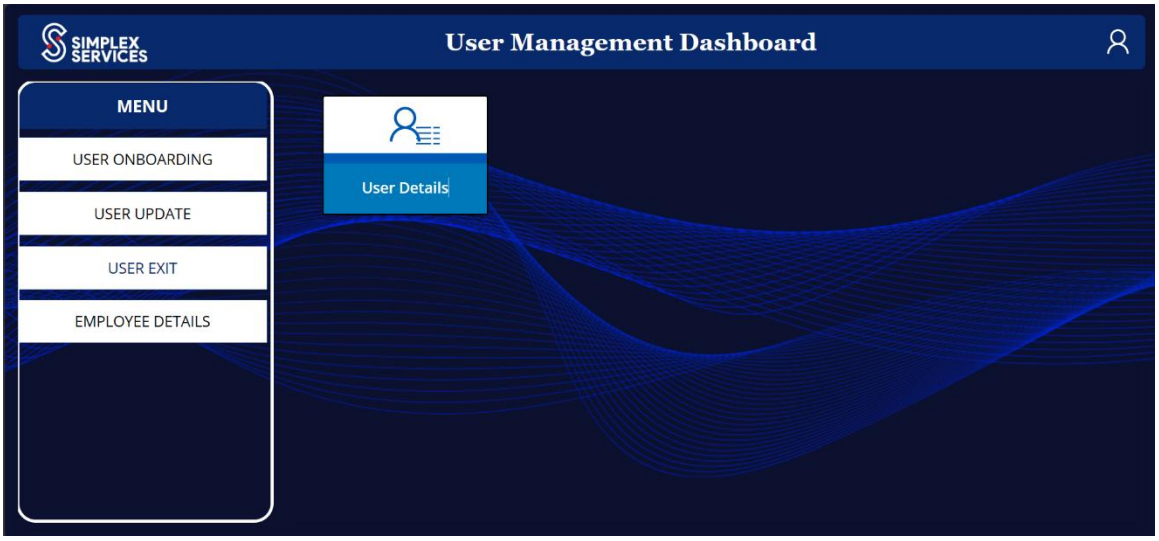
Gallery



User Management Dashboard

Employee Details

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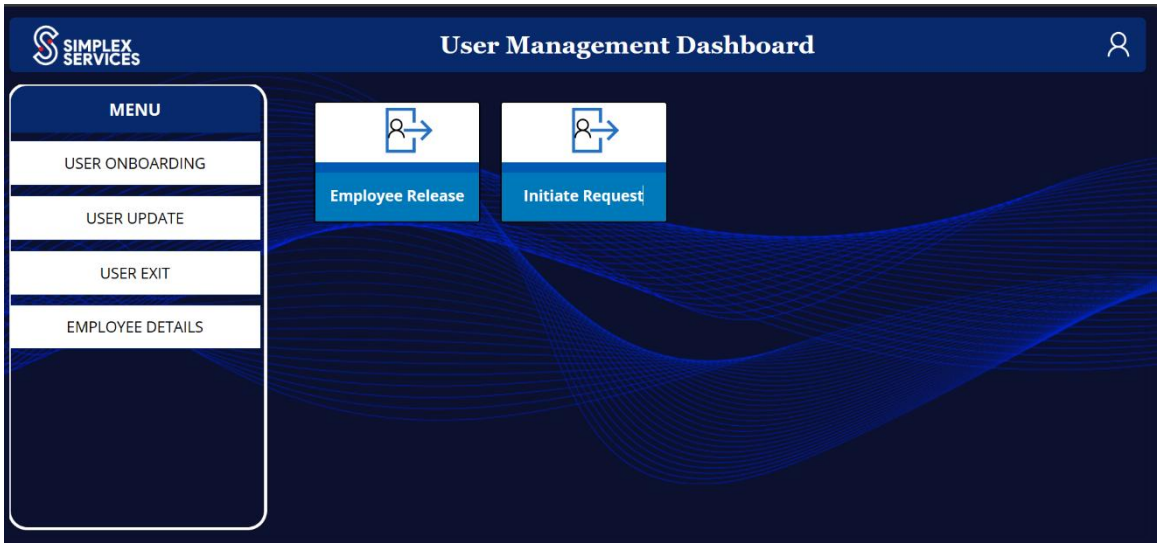
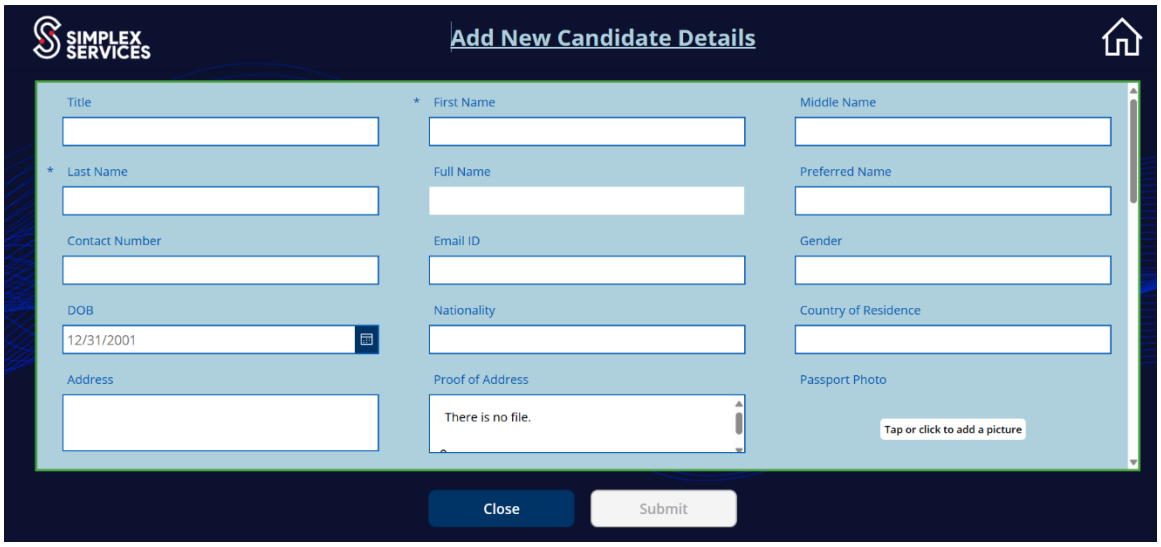


Initiate Request



Candidate Details

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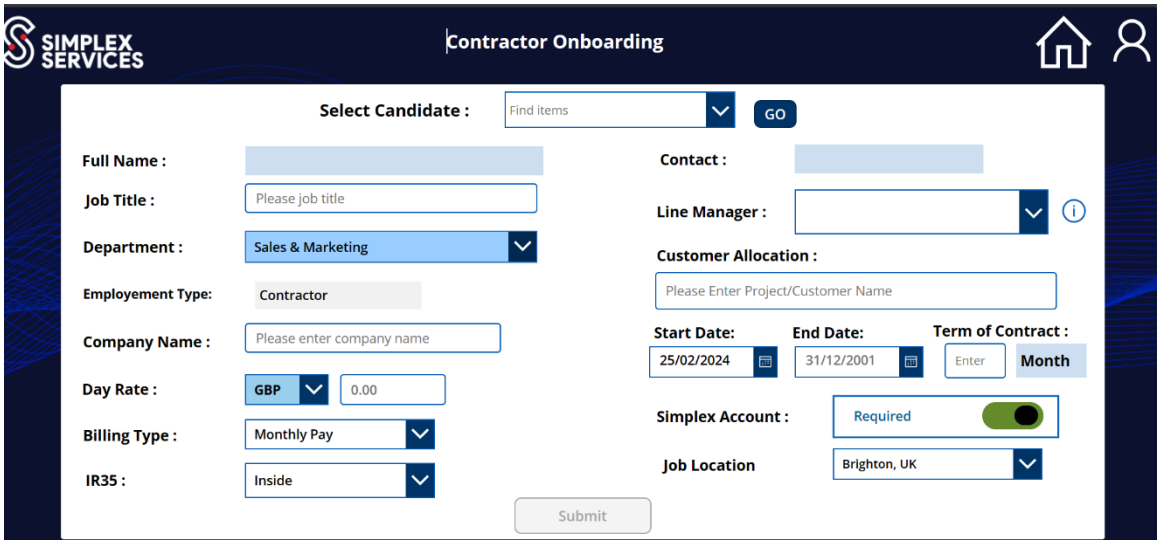
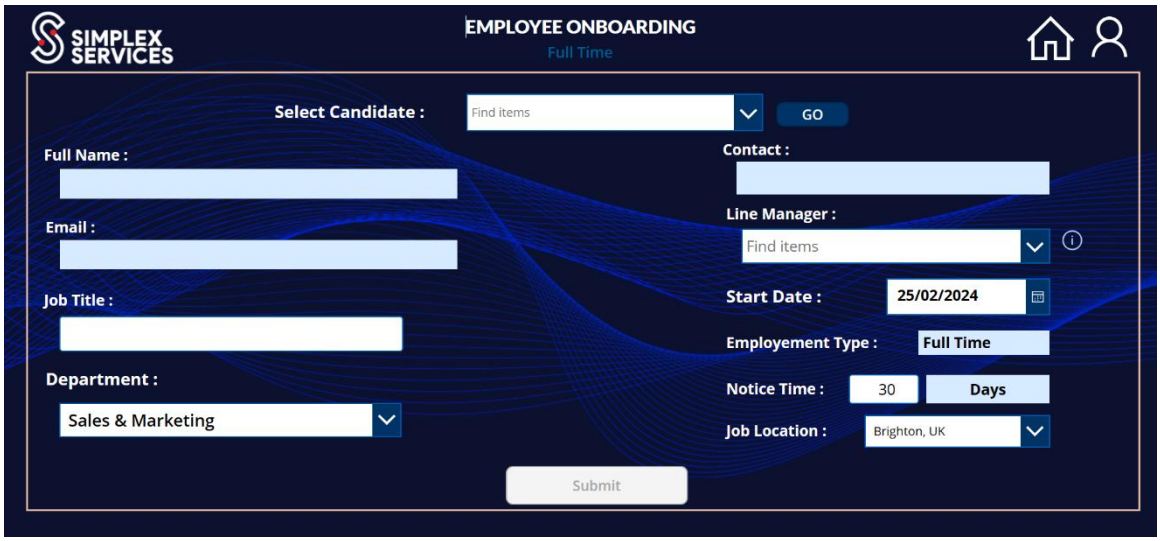


Contractor Onboarding



Employee Onboarding

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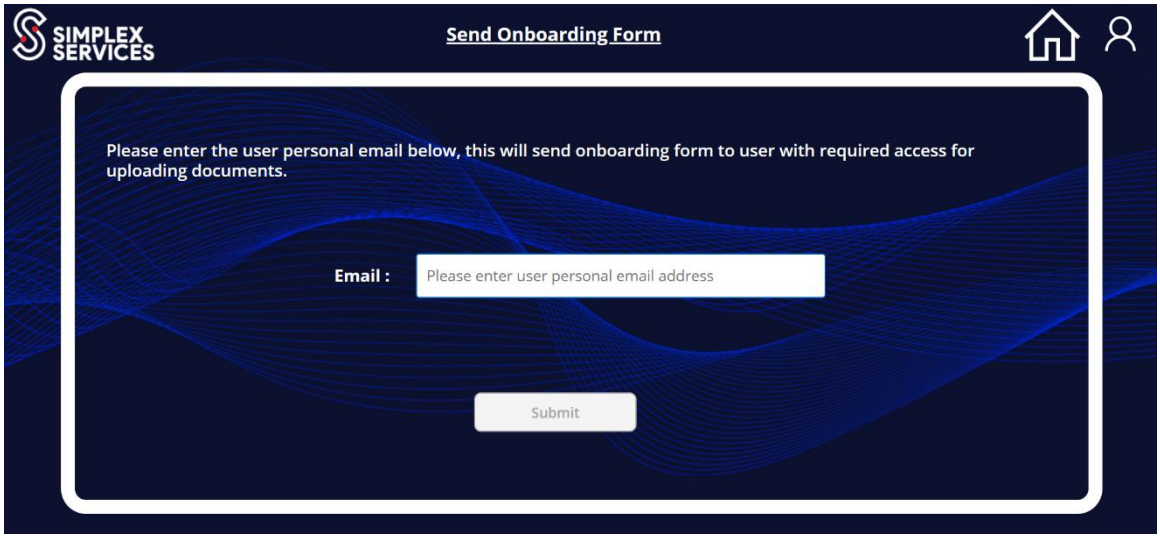
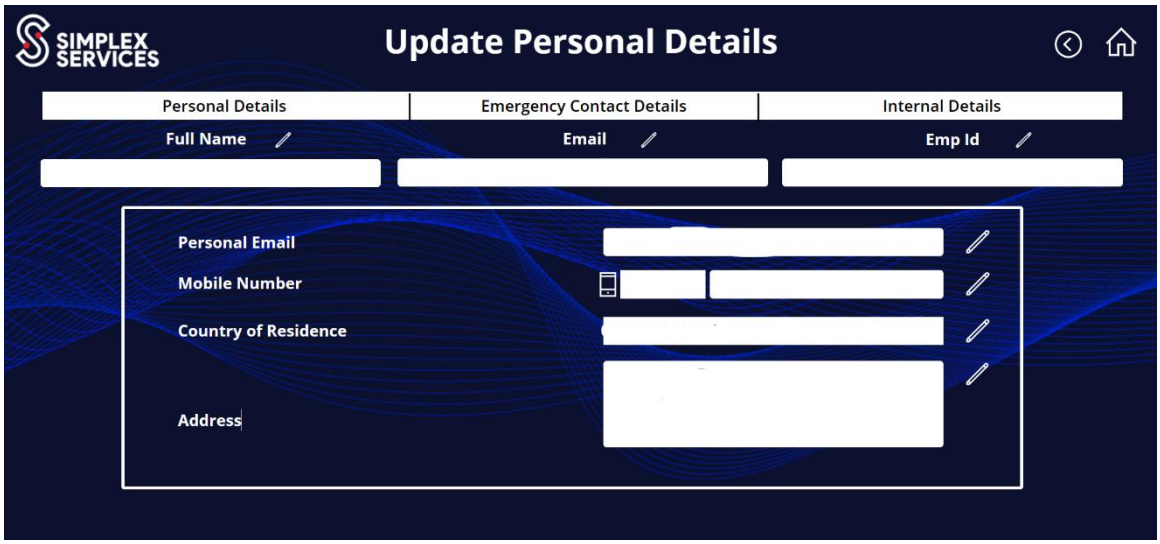


Submit Onboarding Form



Updated Personal Form

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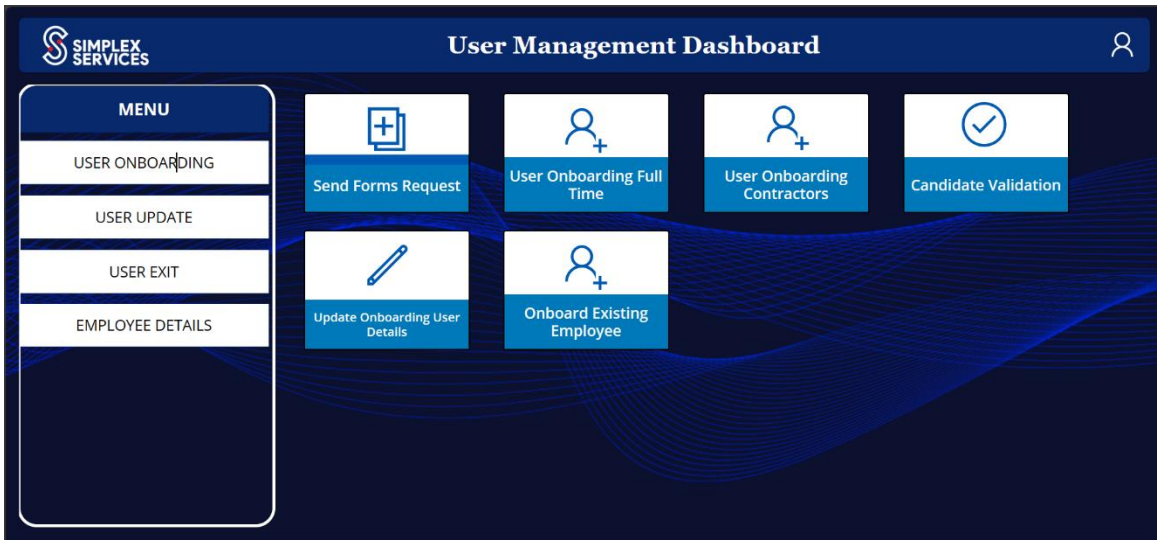
Update Emergency Records



Updated User Management Dashboard

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Speak To Us

Simplex Services offers businesses a complimentary, no-obligation advisory with our experts to review and analyse your organisation's existing Joiner-Mover-Leaver (JML) process across the employee lifecycle.

Based on these insights, our experts will establish and deploy a fitting JML process to drive efficiency as well as a positive employee experience, aligned with the organisation's business goals.

Book a free Simplex Advisory here, and we'll set you on a path of a streamlined and efficient JML process!

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