

# Welcome to our virtual waiting room!

While you wait for the session to start, please take time to:

1. Familiarize yourself with BlueJeans
2. Check your name- update first and last if incorrect
  - 1 in the picture
3. Visit the chat window
  - 2 in the picture
4. Visit the question & answers window
  - 3 in the picture

## BlueJeans Participant Screen

### Attendee View

(David Lee)

Entry banner alerts Attendee that nobody will be able to see or hear them.

Event title → Sales Kickoff

Speaker Volume →

Mute Speaker →

Full Screen →

Exit the event

Main (roster) view 1

Chat w/ everyone 2

Chat w/ Moderator

Questions & Answers 3

Expand side navigation (display Presenter roster)

Settings (choose which speaker to use)

Slider bar – drag to change the size of video and content

# Lunch with Leaders LIVECast: **Elegant Off-Boarding and Transition Planning Essentials**

April 8, 2021



# Virtual Meeting Norms

Actively participate to make this engaging! You have several opportunities:

- Respond to all polls using your phone.
- Ask the facilitator questions in the **Q&A window** unless directed otherwise.
- Share your experience, add a comment, or ask for clarification using the **Chat feature**. A moderator will monitor the chat.

# Obtaining CME/CE Credit

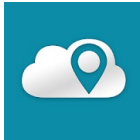
To received CME/CE credits:



**Text the event code to (215) 398-6728 (NEW!)**



**Login at <https://upenn.cloud-cme.com> and enter the event code via My CE/CME >> Claim Credit**



**CloudCME app – Institution Code UPENN; enter the event code via Claim Credit**

**Event Code:**  
**72476**

*You must have a profile in the system,  
<https://upenn.cloud-cme.com>,  
to get credit*

# Welcome to Lunch with Leaders

- ▶ Welcome
- ▶ What is *Lunch with Leaders*?

The screenshot shows the Penn Medicine UPHS COVID-19 Learning website. The header includes the Penn Medicine logo and a search bar. The main navigation menu on the left lists various resources: Curricula for Clinicians, Treatment and Testing Guidelines, Infection Control and PPE, Quick References, Telemedicine, Switchboard (PennKey protected), Pennchart Education, and Patient and Family Communication. The 'Lead Strong' page is highlighted, featuring the 'Lead Strong' logo and a welcome message for Penn Medicine leaders. The message states: 'As a Penn Medicine leader, we truly appreciate all you are doing to navigate these unprecedented times. Whether leading teams on the front lines or adapting to the new virtual environment, each and every one of you have stepped up like never before. This site is designed to provide ideas and best practices around leading yourself and your team during adversity. Remember that there is a potential for leadership at all levels. Now is the time to take action and make a difference. Use these resources plus your own creativity to design new ways to lead in tough times, great times and everything in between.' Below this, there is a section titled 'Lunch with Leaders' with the 'Lead Strong' logo and a message: 'We are leading in a time of transformation. "Lunch with Leaders" is a one-hour, virtual leadership development series which Penn Medicine leaders can connect and share practical tips for leading effectively. Please join us live, Thursdays at noon! BYOL - bring your own lunch!'

# What's in the Mail?

*What did you enjoy about the last session?*

**The dynamic duo were terrific!**

**Marianne Incmikoski**  
Chief of Staff  
Department of Medicine

The topics have been excellent. More sessions similar to today's session (3/25/21). **I think it was one of the best that I have seen so far.**



**Frequent dialogue with clear, honest communication**

**The connection and partnership** between Michael and Tom and **honesty** they brought.

*Anonymous comments from the evaluation survey*

# Nominate Lunch with Leaders Guests!

We are listening. We want to hear from you.

**Nominate a leader to future Lunch with Leaders!**



Via this week's Lunch with Leaders session evaluation survey: [Click here for the link](#)



# Unconscious Bias Training

*Congratulations*

IDENTITY		TIME	TOTAL COMPLIANCE
23	100%	100%	84.6%
11	100%	100%	90.9%
1	100%	100%	92.0%
TOTAL		54	85.8%

## Penn Medicine Team Goal Metrics:

(as a % of all Penn Medicine faculty, students and staff)

Threshold: 80%

Target: 85%

High Performance: 90%



# 30 Minute Coach



*Monthly 30 minute virtual sessions on timely talent management topics for both individual contributors and managers*

## April Session: Motivation



### ***Leading yourself:***

Learn how to identify your intrinsic motivations and use them to be even more effective at work

Tuesday, April 13<sup>th</sup>, 9:00AM

Wednesday, April 14<sup>th</sup>, 2:30PM

### ***Leading others:***

Learn how to tap into your employees' motivations to build an even more engaged team

Tuesday, April 13<sup>th</sup>, 2:30PM

Wednesday, April 14<sup>th</sup>, 9:00AM

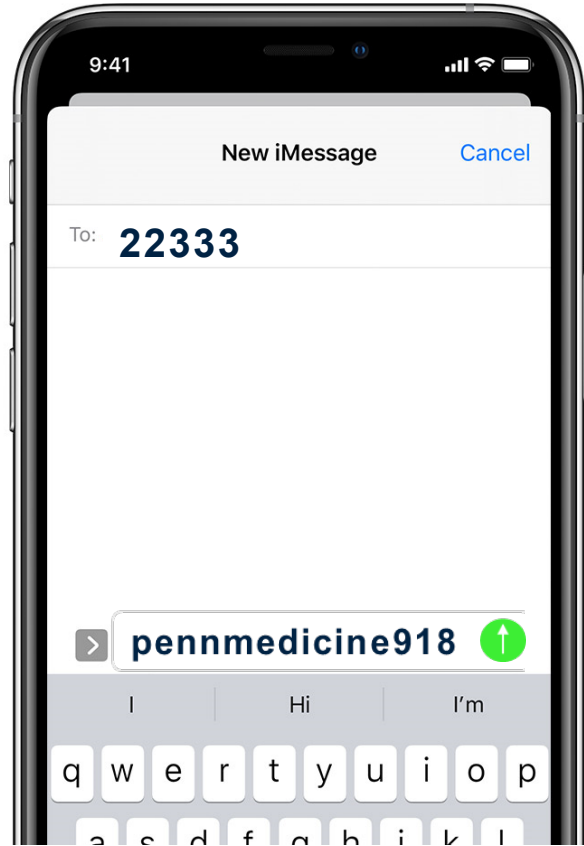
*Coming up in May: Career Conversations*

# Today's Objectives

- ▶ Learn how to plan for transition and off boarding
- ▶ Identify tips for ensuring smooth off boarding, transition and onboarding for yourself and your team
- ▶ Hear leadership stories and insights on how leaders have navigated their journeys
- ▶ Connect with others and share ideas on how to plan for transitions, keep things stable for the team and support each other

# Participate in Poll Everywhere

#1



#2 What emotions are you feeling today?

# Lunch with Leaders Guests



**Jan L. Bergen**  
Former President &  
Chief Executive Officer,  
LGH



**Charmaine Rochester**  
**DHA, CPA, FACHE**  
Chief Financial Officer,  
LGH



**Gretchen Kolb, MS**  
Director,  
Learning Innovation,  
HR/PMA



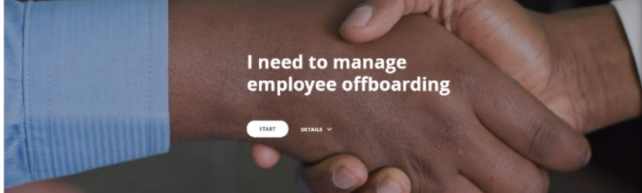
# What emotions are you feeling today?

# New Pathway to Help You!

## BREAKING NEWS ALERT

**NEW!**

### Transition and off-boarding leadership pathway




**I need to manage employee offboarding**

START DETAILS

Whether an employee is transitioning to a new department, leaving the organization or retiring, an employee's transition can generate mixed emotions for the manager. You may feel excitement for the individual, anxiety about the transition process and disappointment if the news comes as a surprise. These are all common reactions to change.

#### Capture Job Knowledge



Have the employee document current work status.

Click each box for more information.

Job-related Tasks

Current Projects

Key Contacts

Location of Key Documents

Systems and Technology

Meetings

#### Create a Transition Plan

#### Transition Checklist

Name of Transitioning Employee: \_\_\_\_\_

Name of Manager: \_\_\_\_\_

Instructions: Use the checklist of appropriate steps to follow for an employee leaving the organization.

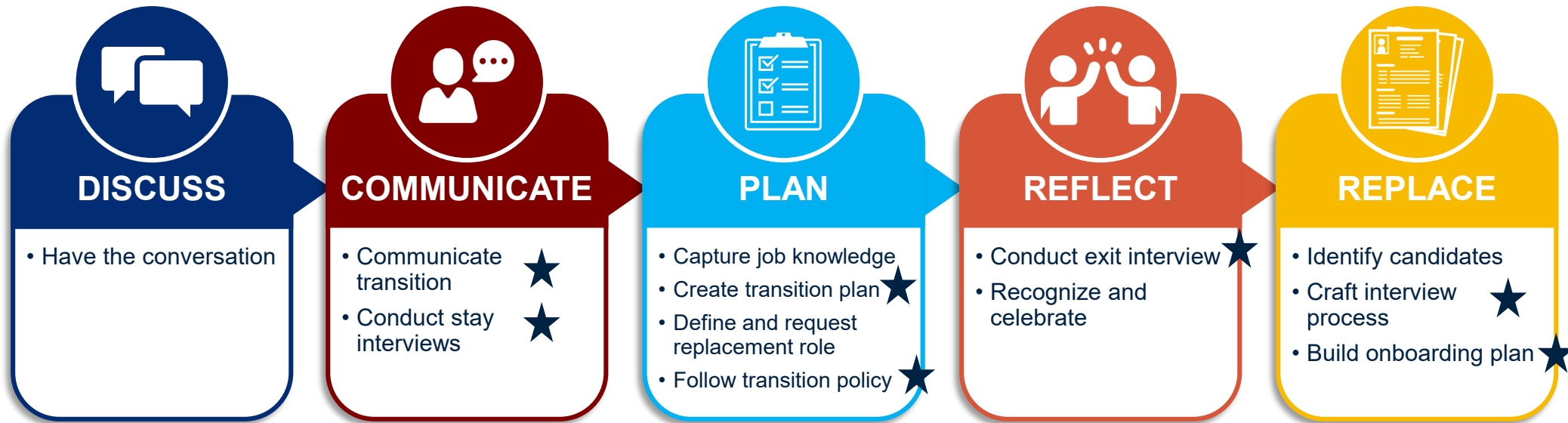
Offboarding Item	Date Completed	N/A
Review your completed Transition Plan with the employee.		<input type="checkbox"/>
Ensure critical files have been transferred to an agreed upon location.		<input type="checkbox"/>
Create an appropriate "out of office" message if the individual is leaving the organization.		<input type="checkbox"/>
Process the termination through PennforPeople within 48 hours of resignation receipt. This removes the employee from payroll and ensures network and clinical system access is revoked.		<input type="checkbox"/>
Approve and submit hours worked in the final pay period.		<input type="checkbox"/>
Submit unused eligible PTO hours on the day following the last day worked using the appropriate time pay out codes.		<input type="checkbox"/>
Arrange with the employee to return health system issued identification badges, keys, access cards and uniforms.		<input type="checkbox"/>
Arrange with the employee to return health system issued cell phone, laptop, other devices and property.		<input type="checkbox"/>
Ensure access to any departmental electronic system is revoked.		<input type="checkbox"/>
Submit the employee's resignation letter through PennforPeople.		<input type="checkbox"/>
Remind departing employee if they have used tuition benefits in the last 12 months to contact the Tuition Office to make repayment arrangements.		<input type="checkbox"/>
If the employee is working remotely, make appropriate arrangements to return Penn Medicine property or if necessary, discuss the best process with your HR business partner.		<input type="checkbox"/>

Notes: \_\_\_\_\_

**All transition and off-boarding process, tools and resources curated in one place!**



# Managing Employee Transition and Off-boarding




Link to [Transition and off-boarding pathway](#)



# Leadership Pathways including Onboarding

## PMA Leadership Pathways



### Leading Others

To be a great manager and leader today, you also need to have the right skills to lead others. This means having the knowledge, engage, motivate and manage people. It also means understanding and how you can be a great leader. You need to also be able to motivate people towards common business and organizational goals.

Managing High Potentials

Onboarding and Offboarding

Giving Feedback

Performance Management

Enabling a High Performance Team

Leading a Virtual Team

Diversity and Inclusion


Dreams Careers Realized

Leadership

I HAVE A NEW EMPLOYEE OR FACULTY MEMBER I WANT TO SET UP FOR SUCCESS


I NEED TO MANAGE EMPLOYEE OFFBOARDING

### Develop an onboarding plan



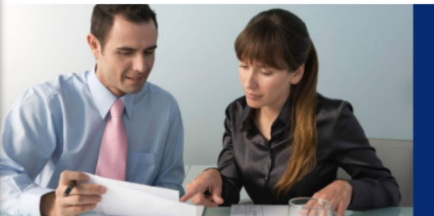
#### Create an onboarding plan based on the new employee's role

New Employees	New Leaders	New Faculty
<a href="#">Onboarding Instructions for New Employees</a>	<a href="#">Onboarding Instructions for New Leaders</a>	<a href="#">Onboarding Instructions for New Faculty</a>
<a href="#">Onboarding Decisions for New Employees</a>	<a href="#">Onboarding Decisions for New Leaders</a>	<a href="#">Onboarding Decisions for New Faculty</a>



#### PMA Tip

Remember, onboarding plans are just as important for internal transfers as they are for new employees. You can customize to specific needs in the new role.



#### Determine how you will assess the new employee's progress

- How frequently will you monitor progress of the onboarding plan?
- What are the performance milestones for the new employee?
- How will you monitor the pace by which the new employee is progressing?

#### Schedule consistent one-on-one check-ins to provide feedback

- Review [Leading Productive One-on-One Meetings](#)
- Use the [talent feedback job aids](#) and frequently give [Real-Time Feedback](#)
- Assess progress, answer questions, debrief learnings and set development expectations

#### Plan ahead for the employee's 6-month performance review

- Discuss the expectations, format and timeline for the introductory performance review in advance
- Review the [Giving Performance Feedback](#) job aid to help you provide valuable performance feedback

Link to [Onboarding Pathway](#)



# Leadership Pathways

*Resources curated into one, easy to navigate, step-by-step pathway to address common questions*

## Leading Self

*Enhancement of key skills in leading self, providing exposure to leadership and exploring career possibilities*

- [Dream Careers Realized](#)

## Leading Others

*Focused on leading others and building strong teams*

- [Developing High Potentials](#)
- [Engaging High Potentials at Risk of Leaving](#)
- [Promoting a Feedback Rich Environment](#)
- [Having More Development Feedback Conversations](#)
- [Managing Underperforming Employees](#)
- [Making the Performance Review more Productive](#)
- [Leading Engaging Virtual Meetings and Training](#)
- [Leading a Virtual Team Successfully](#)
- [Talking about Diversity and Inclusion with Your Team](#)
- [Setting a New Team up for Success](#)
- [Setting New Employees up for Success](#)
- [Managing Offboarding and Transition Planning](#)
- [Creating Customized Leadership Development Activities for my Team](#)

## Leading the Business

*Fundamentals of developing business and financial acumen to support foundational leadership passage*

- [Understanding the Economics at Penn Medicine \(in development\)](#)
- [Telling a Story with Data \(in development\)](#)



## ***Managing Difficult Conversations Now***

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April 22, 2021 at 12pm

**Our guest:** **Catherine Morrison, JD**  
A renowned, external speaker on negotiation and conflict management



# Add the Series to your Outlook!

## *Upcoming Lunch with Leaders LIVEcasts*



- April 22** **Managing Difficult Conversations Now**  
with Catherine Morrison, JD
- May 6** **Spotlight on New Executives**  
with James Demetriades and John Herman
- May 20** **Growing Up Penn Medicine**  
with Peter Quinn, MD, and Lori Gustave

Stay tuned for more!

Click [here](#) or visit [Lead Strong Site](#) to add the event series to your Outlook calendar.

# Exit Poll Everywhere

