A PRACTICAL GUIDE FOR AEC LEADERS | ESSENTIALS

# The AEC Joiner, Mover and Leaver Process Guide

## Help your people become productive sooner, without creating unnecessary security risk.

A new employee starting, someone changing responsibilities or someone leaving can look like a simple admin task. In practice, each change affects the person's access, equipment, applications, project information, licences and responsibilities.

Getting it right takes more than a request to IT. It takes the people who understand the employee, their role and the technology working through one collaborative process.

**Productivity**

**Employee experience**

**Security**

## The three employee changes

### Joiner

Starting with the business. Equipment, applications, access and information ready from their start date.

### Mover

Changing role, team, location or projects. Add, change or remove access, not simply keep adding.

### Leaver

Departing the business. Remove access on time, protect information, recover assets and hand over work.

**Contractors, consultants and temporary staff count too. Agree a firm end date up front.**

WHO'S INVOLVED AND THE PROCESS

# Bring the right people into one process

No single person knows everything. Each decision should be made by the person best placed to make it.

| | |
|---|---|
| **Manager** | Role, projects, access needed and who inherits the work. |
| **Administration or HR** | Employment details, dates, role, team and location. |
| **Operations or project leadership** | Project access, client systems and what must be transferred. |
| **Finance** | Purchasing, licences, cost allocation and company assets. |
| **Netcare or your technology provider** | Turns agreed requirements into technical work and flags any gaps. |

## One collaborative process, seven steps

| | | |
|---|---|---|
| 1 | **Trigger the process** | Start as soon as the change is confirmed, including the intended outcome. |
| 2 | **Gather the requirements** | If information is missing, pause or escalate. Don't make IT guess. |
| 3 | **Obtain approvals** | From the person who owns the business risk. |
| 4 | **Translate into technical tasks** | Equipment, accounts, licences, access and transfers. |
| 5 | **Review dependencies** | Make gaps visible, assigned and followed up. |
| 6 | **Confirm technical completion** | What's done, what's outstanding, what might delay it. |
| 7 | **Confirm the business outcome** | The manager confirms the person and the business are ready. |

**Technical completion matters, but it is not the final measure of success. The business confirms the outcome.**

THE ESSENTIALS CHECKLIST

# Capture the complete requirements

Not every item applies to every person, but every category should be considered.

### Equipment and workplace

- [ ] Laptop, monitors and mobile devices
- [ ] Where they'll work, and the delivery date
- [ ] Equipment to reassign or recover

### Microsoft 365 and communication

- [ ] Account, licence, Teams and SharePoint
- [ ] Shared mailboxes, groups and delegation
- [ ] Leaver email, automatic replies and retention

### Project and client information

- [ ] Project folders and common data environments
- [ ] Sensitive information, with a named approver
- [ ] Client systems and external portals
- [ ] Previous project access to keep or remove

### AEC and business applications

- [ ] Applications, licences and permission levels
- [ ] Cost approver and training needs
- [ ] Licences to reassign or cancel

### Security and authority

- [ ] The right level of information access
- [ ] Elevated privileges, with a named approver
- [ ] Multi-factor authentication and remote access
- [ ] Accounts outside Microsoft 365 and shared credentials

### Induction and support

- [ ] How to get technology support
- [ ] Security guidance and required training
- [ ] Time to test the setup before it's needed
- [ ] A first-day or post-move check-in

The complete guide includes the full checklist, tagged by joiner, mover and leaver.

WORKSHEET

# Start with the outcome, finish with confirmation

## 1. Start with the business outcome

Before discussing accounts, laptops or licences, agree what is changing and what success looks like.

| | |
|---|---|
| **Employee name** | |
| **Event** | ☐ Joiner ☐ Mover ☐ Leaver |
| **Effective date and time** | |
| **Manager** | |
| **Role and team** | |
| **Projects or client accounts** | |
| **What does success look like?** | |

## 2. Confirm it worked

### Joiner

- ☐ Can they sign in and use their equipment?
- ☐ Can they reach the right project information and applications?
- ☐ Do they know how to get help?

### Mover

- ☐ Do they have the access the new role needs?
- ☐ Has old access been reviewed and removed?
- ☐ Have licences and equipment been adjusted?

### Leaver

- ☐ Was access removed at the agreed time?
- ☐ Were assets returned and licences cancelled or reassigned?
- ☐ Were information and responsibilities transferred?

| | |
|---|---|
| **Outcome confirmed by** | |
| **Date** | |
| **Outstanding action, if any** | |

QUICK CHECK

# Is your process working?

| | Yes | Partly | No |
|---|---|---|---|
| We have one defined process for joiners, movers and leavers. | ☐ | ☐ | ☐ |
| Managers know what information they must provide. | ☐ | ☐ | ☐ |
| Sensitive access requires approval from an appropriate owner. | ☐ | ☐ | ☐ |
| Movers' existing access is reviewed when their role changes. | ☐ | ☐ | ☐ |
| Leaver planning covers more than the main Microsoft 365 account. | ☐ | ☐ | ☐ |
| The business confirms the outcome after technical completion. | ☐ | ☐ | ☐ |

**Mostly "Yes":** a strong foundation. Keep testing and improving.

**Several "Partly":** responsibilities and information are probably fragmented.

**Several "No":** start with a process owner, the minimum information required and the outcome to confirm.

> **The checklist tells people what to do. The process ensures the right people work together to decide what needs to be done, and whether it worked.**

READY TO IMPROVE YOUR PROCESS?

## Schedule a Technology Success discovery call with Netcare.

We'll review how joiners, movers and leavers are managed today and identify practical ways to make the process more productive, secure and reliable. Bring this quick check with you.

**(02) 9114 9920** **www.netcare.net.au**