Follow the trails: A path to systematically designing corporate alumni programs

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Abstract

Organizations today are facing increasing amounts of turnover and evolving labor markets. When employees leave they become corporate alumni, which initial research suggests are an important and valuable part of an organization's network. Corporate alumni can provide value as brand ambassadors, a source of employee referral, as a return employee (i.e. boomerang), or through knowledge sharing. One way to establish a strong network of alumni and achieve some of these benefits is to establish a corporate alumni program (CAP). Although CAPs are increasingly being recognized as beneficial for organizations, little is known about how to systematically design and implement these programs to enhance the likelihood of success. In this article, we utilize instructional systems design processes to offer guidance for how to strategically develop CAPs. We analyze existing programs to highlight common elements and use this research as a basis for creating the TRAILS typology, a way to designate practices for CAP implementation. We also suggest ways to evaluate and determine whether these programs are successful.
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As companies are scrambling to deal with the challenges associated with unprecedented high levels of employee exit and mobility (commonly referred to as "The Great Resignation"), many are increasingly seeing the value in engaging corporate alumni. Traditionally, employee turnover was considered the end of the employee lifecycle with departing employees being "out of sight out of mind". However, some companies today are beginning to recognize that a new model is needed; one that extends talent management to former employees by engaging alumni to help fill business needs.

Research suggests that corporate alumni can provide value to organizations through talent acquisition, brand reputation, knowledge management, or as clients or customers. Studies demonstrate that hiring boomerangs (employees who leave and then return to an employer) offers a relatively quick and cost-effective way to meet labor needs because of their lower recruitment costs, shorter time-to-productivity, and greater commitment and satisfaction. The

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total savings of hiring boomerang employees can be substantial, but depends on many factors (e.g., the type of job and salary). Industry market data shared by Andrea Legnani, Global Head of Alumni Relations at Citigroup, estimates a savings of between $50,000 and $75,000 each time a member of the alumni network is rehired. Even at a fraction of those estimates, the savings can be significant. Hence, it is not surprising that companies are increasingly sourcing alumni to fill talent needs. Michael Destafano, the Global Alumni Leader at Ernst & Young (EY) indicates that 17% of its workforce comes from its alumni network, which is on par with academic research shared by Swider and colleagues as well as a survey conducted by Gartner that indicate that boomerangs make up about 10-20% of company "new" hires across a variety of jobs.

Alumni do not have to be rehired as full-time employees to provide value to an organization. For instance, Destafano indicates that some alumni may not be interested in returning or a good fit for EY, but may be able to refer the type of person the company does want to hire. Thus, the value of alumni is in the network and continued relationship. Although most former employees do not return as boomerangs, many stay within the company ecosystem as customers or brand advocates. Alumni have many opportunities through word of mouth either in person or on platforms such as Glassdoor to act as brand ambassadors who promote the company or as brand terrorists who speak poorly of the company. In fact, alumni are often referred to as a "marketing army" for the brand among corporate alumni leaders. Organizations such as Starbucks and the Chalhoub Group recognize the importance of the transformation from employee to alumnus and the potential value of corporate alumni as customers and brand ambassadors. Both of these companies focus on the extended relationship with alumni, with Starbucks even suggesting that "once a partner, always a partner".

Finally, corporate alumni can be a valuable source of knowledge for organizational learning and brand development. In the retail industry, the employee experience team at Harrods asks alumni to participate in focus group conversations with current employees about how the company can improve the employee experience and make innovative business decisions. The Chalhoub Group invites alumni back to do market research in brand development brainstorming for new retail products. Hospital alumni associations, like the Cleveland Clinic, connect employees and alumni to other world-class physicians in all different medical specialties to continue to learn from one another and collaborate on research or patient care. Moreover, during COVID-19 many healthcare institutions depended on retired alumni to continue to mentor or provide learning opportunities such as by returning to train nurses to get to productivity faster.

Developing a Corporate Alumni Program (CAP) serves as a means for extending the employee lifecycle by strategically and intentionally engaging alumni in meaningful ways to recognize some of these benefits. Company run CAPs grant the organization more control around the narrative about employment and exit from the company to shift the conversation in a favorable way. While alumni programs are typically associated with higher education, many companies have well-established, mature CAPs that are efficient,

formalized, and have a strong identity among organizational stakeholders. These CAPs have typically existed in industries such as professional and legal services where high employee mobility has always been a reality and the value of maintaining connections with alumni was more obvious. Yet, given that frequent employee mobility and the potential value of alumni is no longer unique to certain industries there is increasing interest in CAP design across a broader range of organizations. Data shared by Enterprise Alumni, an alumni and retiree management platform, suggests that many Fortune 500 companies have some form of CAP and that in the past couple of years CAPs have been put into the mainstream spotlight, partially because of the impact of the COVID-19 pandemic on the employee-employer relationship.

While there is increasing interest in corporate alumni and we know there is a lot to gain from engaging alumni, little guidance has been offered with regards to the processes of *how* to successfully design a CAP to engage alumni. Legnani, from Citi Alumni Network suggests that developing and managing alumni programs is moving from "an art to a science". Yet, in practice, most guidance comes from software vendors who tend to offer targeted advice on what to or not to do when designing a CAP. While this information is useful, it is lacking a holistic and structured approach, which leaves firm executives with many questions about how to develop and implement a CAP.

The purpose of this paper is to present a strategic, comprehensive, and systematic approach for designing a CAP that encourages departing and former employees to become engaged alumni. To establish our guidelines for developing a CAP we depended on a thorough review of the academic literature on corporate alumni and training program design as well as a content analysis of company and research reports, CAP websites, and transcripts from the Enterprise Alumni Webinar Series. We also spoke with over 17 leaders of mature CAPs from a variety of industries that are company run and have been in existence for at least three years. Any specific company names and examples we use in this article are from publicly available information that can be found via published articles, webcasts, or websites.

We provide a five-stage, structured guide for making CAP design decisions using the CAP strategies and characteristics we identified. The five stages of CAP design that we suggest come from the training design literature. More specifically, we use the ADDIE (Analyze, Design, Develop, Implement, and Evaluate) model of instructional system design as an organizing framework for designing a CAP. We provide recommendations for determining what practices should be offered, to who, why, and when as part of a CAP. Although we present these stages linearly, this process is dynamic and the various stages may occur concurrently.

STAGE 1: ANALYZE THE NEED AND DETERMINE OBJECTIVES

The first stage in CAP design is determining **if** designing a CAP is appropriate, **why** it may be needed, and **how** it would link to the organization's overall goals. As with the

development of any new program, it is important to have a solid purpose with clear goals and not caught up in doing what seems trendy. A strategic design from the start is essential to ensure the program achieves desired results. It begins with an organizational and person analysis to determine the objectives of the CAP and the value-proposition to alumni. This initial stage of CAP design is critical for making all subsequent design decisions.

The first step of the organizational analysis is asking why the company is considering a CAP. There needs to be clarity about the purpose and mission of a CAP, which can vary greatly. Some programs focus on creating a community, while others focus on helping with talent acquisition and facilitating partnerships with alumni as customers or suppliers, or some combination of these. The second step is assessing the overall business strategy, vision, and values as well as the current HR practices and determining how the CAP will align with current people management practices. CAP initiatives should be value-driven as a reflection of the employee experience for a seamless transition from employee to alumni. If employees are not treated well, alumni will not be interested in staying connected and will perceive the CAP as insincere. Moreover, current employees might be resentful if alumni are being supported by the organization if they do not feel supported. Thus, the CAP must be a natural extension of the existing talent management process.

The third step in an organizational analysis is garnering top management support by identifying the priorities for a CAP and ensuring executives are committed to developing and promoting the CAP. This may come in the form of finding an executive sponsor to champion the program. The fourth step is determining the resources needed and available for CAP, including the budget, time, software, and if there is internal expertise available to design the program.

If the organizational analysis results determine it is appropriate to move forward with developing a CAP, then the person analysis should be conducted to gather information about the alumni. The first step to offering a valuable CAP that motivates alumni engagement is identifying the preferences and needs of alumni. It is important to ask, for example, why people left the organization, the turnover rate in the organization, where people are going, and what they are saying when they leave. Finally, it is important to understand if former employees want to stay connected, with who, and what activities they are interested in engaging in as alumni. This feedback from alumni will influence what CAP practices are appropriate to offer to appeal to different types of leavers (e.g., voluntary, involuntary, retirees, etc.).

The final step of the analysis stage (i.e., Stage One) is to use the results to determine the mission and objectives of the CAP as well as a clear value-proposition for alumni. The mission and objectives will establish targeted outcomes to guide program design decisions, offer criteria for measuring the effectiveness of the program, and identify opportunities for improvement over time. A sample primary objective might be, "to build a community of lifelong brand ambassadors and empower them to achieve their professional and personal potential". Specific and measurable derived objectives should be established in support of achieving the primary objective. For instance, using the sample primary objective described above, the CAP derived objectives might include, "to host quarterly social events and career-focused developmental events that are attended by at least 50 alumni each".

A common question is, "if someone left a company and has moved on, why would they put energy into staying engaged with their previous employer?" To address this question, many of the CAPs we analyzed had their value-proposition displayed publicly on their webpage. For example, EY says, "Our EY alumni network helps connect all of our EY people, past and present, to more opportunities, more resources and more of the people they need to know for the future", while Starbucks states, "here's your place to connect with fellow alums, discover new opportunities to grow, and stay in touch with the latest news and events." A central theme is that regardless of the individual's current situation or interest in being an engaged alumnus, CAPs provide a unique opportunity to preserve lifelong relationships and stay connected to an exclusive professional network of individuals with the shared experience of working for the same organization. Companies like SAP, Chalhoub, Marks & Spencer, and Salesforce recognize the importance of lifelong connections and refer to alumni as a part of the "family".

Key Questions for Stage 1: analyzing the need for a CAP and determining objectives

- Organizational analysis: What is your purpose for establishing a CAP? How does it align with the organizations values and strategy? Who would be an executive sponsor? What resources are needed and available to support a CAP?
- Person analysis: Why are people leaving? Where are they going? How can the employee experience be improved? Do alumni want to remain engaged, with who, and how?
- Establish objectives: What is the mission and objective of the CAP? What are the targeted, measurable outcomes? What is the value-proposition to alumni?

STAGE 2: DESGN CORPORATE ALUMNI PROGRAM PRACTICES USING THE TRAILS TYPOLOGY

There are many ways to achieve the objectives of a CAP. Stage Two involves systematically determining **what** practices to offer as a part of the CAP. We introduce the TRAILS typology to help make decisions about which practices to offer. The TRAILS typology [Table 1] is an organizing framework we established to classify different alumni-focused practices into categories based on six re-occurring themes in our review of CAPs. The TRAILS typology includes (1) Tracking and analyzing data, (2) Recognizing achievements, (3) Allocating resources, (4) Information and opportunity sharing, (5) Learning and development initiatives, and (6) Socializing and networking events. We share commonly offered CAP practices within each category as well as examples of specific companies offering those practices. Our list of practices is not exhaustive, and our examples are illustrative rather than comprehensive. A summary of the

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Table 1 *Stage 2: Design the CAP using the TRAILS typology-* determine *what* practices to offer to support the specific objectives of the CAP.

Design Categories	Alumni Management Practices	Examples
Tracking and Analyzing Data	• Update exit interviews • Conduct alumni interviews/Surveys • Update alumni database	• Boston Consulting Group, has a link to an alumni survey on the alumni webpage and shares fact sheets with aggregated alumni data. • Faegre Drinker Biddle & Reath provides a spot for alumni to easily update their profile on the alumni webpage
Recognizing Achievements	• Thank departing employees and acknowledge their contributions • Invite alumni to share experiences as guest speaker • Feature personal and professional accomplishments in Alumni Spotlights	• The McKinsey Alumni Center Webpage highlights the "Four alumni on Fast Company, Fortune 40 under 40 lists" • SAP provides an alumni badge welcoming them to the alumni network with a note of appreciation. • Salesforce has "alumni spotlight" and "boomerang spotlight" stories on its alumni webpage
Allocating Resources	• Extend alumni access to EAPs and employee perks • Provide career support/coaching for employees and alumni • Offer alumni referral rewards	• Davis Polk grants alumni access to career coaching from the internal Career Services manager. • Salesforce offers "office hours" for career guidance and an alumni referral program • Bain & Company offer a one-year subscription to Mekko Graphics.
Information Sharing	• Provide an alumni directory and alumni fact sheet • Indicate how alumni can contact firm • Create an alumni job board- including internal, external, and pro-bono opportunities • Share company updates and industry trends with alumni	• Hogan Lovells and SAP have alumni directories and job boards • Davis Polk offers pro-bono opportunities for alumni • Chalhoub alumni are encouraged to engage in company philanthropy and volunteering initiatives.
Learning & Development Initiatives	• Offer certifications, webinars, and Continuing Education Credits • Provide extended access to LMS and training modules • Establish mentorships between alumni and employees or other alumni	• Starbucks offers alumni opportunities to grow through access to free courses and events to develop their career. • The Accenture Alumni Network hosts the Accenture Alumni Network Speaker Series • Salesforce has extended to alumni its "I am Remarkable" employee training program • O'Melveny offers a comprehensive library of free CLEs and customized training options
Socializing and Networking	• Include alumni in conferences and industry roundtables hosted • Host professional networking events for employees and alumni • Host social receptions – reunions, holidays • Assign alumni a "buddy" as an internal point-of-contact	• Citigroup and Bain host social and professional alumni events in different locations around the world • Marks & Spencer encourages alumni to stay a part of the M&S family by attending private alumni events.

TRAILS typology and associated practices can be found in Table 1.

Each CAP will have a unique set of practices from the TRAILS typology dependent on the company and alumni characteristics. CAPs can focus on one category of practices or diversify and package initiatives from different TRAILS categories together depending on which aligns most with the current situation and objectives. Thus, we cannot provide a one-sized fits all recommendation for designing a CAP. Rather, the practices selected in a CAP design must align the organization's resources, objectives, and value-proposition established in Stage One, as well as the alumni's evolving wants and needs. As such, we highlight when and for whom different practices might be most effective and identify other important considerations when making the decision about CAP offerings.

Tracking and analyzing data

When launching and managing an alumni network, a commonly accepted sentiment that was shared by Destafano at EY is that in successful CAPs "data [are] king". This statement emphasizes the importance of collecting and using alumni data to make decisions. Even after the initial person analysis, tracking alumni data is an ongoing process that enables the CAP to analyze the evolving wants and needs of alumni. Tracking and analyzing data is so essential that every CAP we have reviewed collects alumni data. While it may require a great deal of time and effort, tracking data comes at little cost if the software is already in place.

Tracking alumni data begins at the point of exit by using interviews and surveys to gather information from departing employees about their experience at the organization, reasons for leaving, and overall feelings about the company. For CAP use, these exit interviews should be updated to collect personal contact information. Otherwise, it will be difficult to contact the individual after his or her last day when the professional company email account is discontinued. The aggregated (appropriate and legal) exit data should be shared with CAP leaders. When data about employee exit are not shared, the disconnect may lead to missed opportunities for engaging alumni.

An initial alumni survey conducted by the CAP several weeks out from exit can confirm why people left and the details of their employee experience. These responses tend to be more honest and detailed than those given at the point of exit. Subsequent alumni surveys are used to continue to gather information about alumni and determine their wants, needs, and interest with regards to the CAP by asking questions about how they feel about the company, what capacity they are still connected to people at the company, what alumni practices they engage in, what programs they would like to see offered, and what they are currently doing. The Boston Consulting Group Alumni Network has a link to the alumni survey right on the webpage and posts aggregated alumni data as "alumni network quick facts". Many CAPs, like Faegre Drinker Biddle & Reath, allow alumni to easily edit their profile with up-to-date information.

Recognizing achievements

Recognizing the achievements of employees and alumni demonstrates that an individual is valued and enhances commitment and engagement. It can also serve as a valuable recruitment strategy. When organizations proudly announce the prestigious positions alumni hold after their tenure with the company, it signals that it is okay for people focus on advancing their careers. For example, the McKinsey Alumni Center Webpage highlights the "Four alumni on Fast Company, Fortune 40 under 40 lists". Moreover, the Davis Polk Alumni Network webpage boasts, "Davis Polk lawyers go on to do extraordinary things …. They can be found in the most senior positions in the business world and government, as well as in an array of leading roles in academia and philanthropy". Every CAP we reviewed included initiatives that recognized its alumni.

Recognition can be valuable to all alumni and leavers, regardless of their reason for leaving, but might be most appropriately implemented for those who were high performers or to recognize retirees and establish their legacy as a member of the organization. The cost of most of these practices is relatively inexpensive, as time is the biggest resource investment.

Recognizing achievements to engage alumni can occur at the point of exit by saying thank you, showing appreciation for their work, and celebrating the value they added to the organization. This could include sending a company or department wide thank you email highlighting their contributions to the company, offering a tangible gift or memento, sending a personal card from a company executive recognizing their achievements, or providing an official welcome to the CAP. For example, at SAP when employees leave on good terms they are given an "Awards and Recognition" alumni badge as a sign of appreciation and to verify their achievements. Many departing employees take pride in receiving this badge by sharing it publicly on LinkedIn.

Recognizing alumni comes primarily through sharing alumni news highlighting the professional or personal accomplishments of alumni either in the company newsletter or website. Alumni spotlights may include highlighting the experiences and success of a former employee in their new role in writing, on video, or as a guest speaker. The Salesforce alumni webpage has an "alumni spotlight" and a "boomerang spotlight" where former and returning employees tell their stories about life at Salesforce and beyond. Recognition can also include highlighting personal milestones such as international re-location or the birth of a child. In the Alumni News on the McKinsey Alumni Center website it highlights a Q&A session titled, "Four alumni Olympians reflect on the summer games". It may be important to recognize alumni accomplishments as a part of a broader employee recognition plan so as not to discourage current employees from staying.

Allocating resources

Companies can demonstrate an ongoing commitment to employees and alumni by offering benefits and programs that promote their wellbeing. Alumni interest in these resources might differ based on why they left and their destination after leaving. Most of these practices require a financial investment, but when extending already existing employee benefits to alumni (rather than developing new programs for alumni), the cost can be reduced. Moreover, having these resources available to alumni can yield a positive return in the form of alumni goodwill and engagement. About half of the CAPs we reviewed allocated resources to alumni in some way.

Allocating resources can begin at the point of exit by helping individuals navigate the transition out of the company for a soft landing in a new role. Some CAPs are offering life coaches, psychological counseling, or career coaches to help employees and alumni through career transitions. These are often in the form of designated one-on-one office hours, as is done at Salesforce. While these types of programs were once reserved as a part of outplacement

training for involuntary leavers, today these practices are more commonly being offered to any current, departing, or former employee. For instance, the Davis Polk Alumni Network grants alumni access to career coaching from the internal Career Services manager.

Another way CAPs allocate resources is to offer alumni continued access to employee assistance programs (EAPs) and other health and wellness benefits. Alumni may also be privy to perks like employee discounts, subscriptions, deals and support for philanthropic efforts. For example, on Bain & Company's Alumni Services webpage, alumni can obtain "A one-year subscription to Mekko Graphics chart building software is available, free of charge". In addition, cash rewards or donations to a charitable organization of their choice can be provided as an alumni referral incentive. Salesforce's alumni referral program makes a charitable donation in the name of the alumnus who referred a new hire, to thank them for the referral.

Information and opportunity sharing

Information and opportunity sharing are one of the most critical purposes of a CAP because the more people feel in the know, the more likely they are to be engaged. Transparent communication to employees and alumni about the company and CAP can help generate buy-in and engagement. Every CAP we analyzed uses the alumni platform to share information and opportunities as it is an appropriate practice for all alumni and can be done without any cost other than the time of an employee.

Information sharing from the CAP should begin as the company gains knowledge that an employee is leaving. This can help to reduce uncertainty and set clear expectations about their departure. Transparent information should be shared about what the exit process will entail, what information will be gathered, as well as what they can expect as an alumnus including when they will be contacted by the CAP in the future and what information will be sought. Finally, contact information for the CAP should be shared at departure and easy to access by alumni.

Our research suggests that some of the most valuable CAP initiatives to alumni come from information shared through their access to a directory of alumni and job boards where alumni can both search for and post internal and external job vacancies. Alumni directories and job boards are so prevalent that every CAP we reviewed listed them on the website (e.g., Hogan Lovells, SAP, or McKinsey, and more). Moreover, the Corporate Alumni Benchmarking report by PeoplePath and The University of British Columbia found that 72% of CAPs offer a directory of contact information for current and former employees. CAPs can also share other valuable information including: firm updates and insights, industry trends, opportunities for collaboration on projects, or pro-bono and philanthropy efforts. For instance, members of the Davis Polk Alumni Network are able to "get involved with pro-bono and non-profit opportunities", while Chalhoub alumni are encouraged to join in on company volunteering initiatives. This information might be especially appealing to individuals who left the workforce temporarily, or retired, but want to keep a foot in the door.

Learning and development initiatives

CAPs can continue to support the careers of departing employees and alumni by providing learning and development experiences, which can also help to develop alumni skills in areas where labor is in short supply. A majority of CAPs we reviewed offered learning and development programs to alumni. These programs come in many forms with varying costs associated, yet the costs can be minimal when alumni learning and development programs offered use existing enterprise software for employees.

CAP training topics might be focused on career planning by conducting career assessments or having workshops on resume writing, interviewing, professional networking, or creating your personal brand. Accenture hosts the Accenture Alumni Network Speaker Series on career development topics. Starbucks offers alumni opportunities to grow through access to free career focused courses and events. These initiatives are most valuable for employees looking to advance their careers, or who were let go involuntarily. Financial planning is another possible CAP training topic that would help alumni prepare for the impact of a possible income change from something like retirement or a job move to a different salary level or tax bracket.

CAPs can also offer development opportunities by hosting webinars or conferences either internally or as a sponsor for other professional organizations and inviting employees and alumni. Bain & Company Alumni Services offers both alumni webinar series as well as industry specific conferences. Salesforce has extended its successful "I am Remarkable" employee training program, designed to elevate women's voices, to alumni. Some CAPs are offering access to learning management systems for training on the skills the company anticipates it will need in the future with the intent to actively recruit these alums when needed. Several CAPs also offer certification or continuing education credits. For instance, many law firms like the O'Melveny Alumni program offer a comprehensive library of free continuing legal education credits (CLEs) to alumni.

Socializing and networking events

CAPs help to develop a community of current and former employees with shared experiences and a sense of belonging by hosting events to network, connect socially, and build relationships. These informal interactions engage alumni by opening the door for partnerships, collaboration, social support, and career advice. Almost every CAP we reviewed offered some form of socializing and networking. The cost of these events varies and can be designed to fit within a specific budget.

Social connections during employment are an important precursor to alumni engagement. Waiting to maintain social connections until someone is gone might be seen as self-serving and not genuine. Thus, socializing strategies should begin while an individual is still employed and at the point of exit. Socializing at departure can occur by celebrating the employee's experience with a farewell party to say "goodbye for now". Theresa Ludvigson, who is Vice President of Global onboarding and Loyalty Programs at

Salesforce and oversees the alumni network indicates that they "don't want it to be a sad day when you leave Salesforce, we actually celebrate your next chapter with you". Other CAPs ask certain people in the company (like a mentor, supervisor, or friend) to be a "buddy" or personal connection focused on continuing to foster relationships as an internal point of contact to a specific alumnus.

A common theme in our research was that alumni appreciated being invited back for company social events such as happy hours, reunions, or holiday parties, that they are well attended, and viewed favorably by alumni. One of Bain and Company's Alumni services includes invitations to "alumni events, such as cocktail receptions and industry specific roundtables, [that] are regularly held worldwide". The McKinsey Alumni Network hosts over "100 knowledge and social events annually", while Marks & Spencer encourages alumni to stay a part of the M&S family by attending private alumni events. According to Enterprise Alumni, some CAPs are establishing affinity groups or micro-communities that allow alumni to connect more closely with a smaller group of similar others, following an established model of alumni relations in higher-education.

Deciding which TRAILS practices to offer

When launching a new CAP, just like launching any new initiative, the focus should be on survival and growth. It is important to start small and focus on a couple of specific events or activities that can help achieve initial goals. Ludvigson, at Salesforce, recommends starting by building community without asking for anything in return. Then additional initiatives and events can be integrated to more strategically meet the changing needs of employees and alumni as the CAP becomes more mature and more data are collected.

TRAILS design decisions can also be guided by the needs of different types of leavers including those who leave voluntarily for a new job, retirement, or leave of absence, and those who are forced out involuntarily. For example, an organization experiencing mass layoffs might "Allocate Resources" and provide "Learning and Development" initiatives aimed to help alumni find new employment opportunities. While companies experiencing a high rate of voluntary retirements might "Recognize" the retiree's legacy and provide "Socializing and Networking" events to stay connected and retain intellectual capital. Establishing affinity groups can be useful for meeting the diverse needs of different alumni in the network by establishing a variety of targeted programs that alumni groups can choose to engage in.

When thinking about which of the proposed practices to include in a CAP, contextual factors that will influence what is appropriate such as the geographic location, industry, company, culture, resources, CAP stage of development (i.e., infancy vs. maturity), type of worker (e.g., full-time vs. seasonal), job, and person should be considered. Of course, the cost of the initiatives will need to be considered as well. Many CAP leaders indicated that there are ways to offer valuable programs with a small budget. One way to minimize the costs associated with a CAP is to extend existing employee initiatives to alumni, rather than develop new programming for only alumni. Another way is to select the practices that come with no cost other than time and effort of the CAP leader(s).

Key Questions for Stage 2: designing the CAP using the TRAILS typology

- What TRAILS practices (Table 1) are most appropriate for your organization?
- Which practices will achieve the CAP objectives given the company, alumni, and contextual characteristics as well as the cost of different initiatives?

STAGE 3: DEVELOP AND PLAN FOR SUSTAINABILITY

Once the decision of *what* practices to incorporate in the program (in Stage Two) is made, it is time to determine *how* the program will be integrated into the organization's current systems and sustained (Stage Three), taking into consideration the CAP objectives established in the assessment phase (Stage One). Stage Three (i.e., Develop) brings the program to life by answering questions related to *where* the CAP will fit in the organization's structure, *who* will manage it, and *how* it will be communicated and sustained over time.

Where does the CAP fit in the organization's structure?

The structure of CAPs can vary greatly depending on the objectives of the of the program and size of the company. If the goal is talent related, such as bringing back boomerang employees or enhancing referrals from alumni, the CAP might fall under a human resources department. If the main objective is building community and creating brand ambassadors, the CAP might fall under marketing or communication. On the other hand, some firms concentrate alumni relations efforts in business development to maintain connections between alumni and employees for future collaborations and deals.

It is entirely possible and likely that CAP responsibilities span departments throughout an organization and require collaboration as a part of an interdisciplinary team that includes all of the previously mentioned areas for a seamless transition from exit management to alumni management. Victoria McKenzie-Gould, Director of Corporate Communications at Marks & Spencer suggests that where a CAP fits in the organization is less important than having a dedicated employee (with executive support) who can make connections across all areas of business and build community among a diverse group of people. Thus, when determining where a CAP fits in the organization it is important to consider the program objectives with acknowledgement that success will depend on cross-functional teams with a cohesive vision, clear communication, and shared information and data.

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Who will manage the CAP at a strategic and operational level?

Part of CAP development involves establishing roles and responsibilities regarding who will develop and maintain the CAP. This entails clearly defining the role and determining if there is internal expertise available or if it is necessary to seek external expertise. Strategically managing a CAP typically requires at least one full time equivalent employee to develop, execute, evaluate, and update the program. This may include managing the budget and data, making decisions, reporting results to executives, and ensuring all parts are integrated.

While CAP leaders are responsible for a centralized global CAP strategy, effective execution also requires effort from many stakeholders. If there is a global alumni program for a company operating in multiple locations, regional specific representation is important by leadership from each office. Like most management practices, global strategies should be enforced locally to match the culture and to have more personal touch. This means having a designated partner or administrative assistant at each office to be the liaison or "alumni champion" to facilitate the local events. We recommend using alumni volunteers as CAP ambassadors or as part of an alumni advisory panel to help design and promote the program.

How will the CAP be marketed and sustained?

Establishing a plan for marketing and sustaining the program into the future involves careful branding of the alumni program by determining what the CAP will be called (e.g., alumni network, community, etc.), how members will be recruited, how information will be shared, and how data will be tracked. At this stage, a website or alumni portal should be developed and CAP software should be integrated with existing software.

When a program is being launched members may need to be recruited from a pool of former employees. Interestingly, many CAPs track down alumni by searching LinkedIn and messaging them as an initial step to gaining alumni information. Others reach out to existing grassroot alumni groups (formally or informally run by alumni) with an invite to join or even partner with the CAP. To create buzz on social media, some CAPs ask alumni to share their favorite experiences and memories as an employee. Finally, sometimes there is an incentive offered for joining the CAP. For example, to gauge alumni interest and increase enrollment in its new CAP, Starbucks is offering a $5 exclusive Starbuck's alumni gift card to anyone who joins as a member. This type of incentive is especially important when starting a program from scratch and trying to contact former employees who have been away for varying amounts of time.

Ongoing communication with alumni is important especially during the first year after they leave. According to the PeoplePath Corporate Alumni Benchmarking report, most CAPs communicate with their alumni either monthly or quarterly in a variety of ways, such as through a private LinkedIn alumni group, a CAP website, an alumni portal, and a newsletter. Ultimately, to engage alumni, the CAP website should be a one-stop-shop for alumni where they can login to a portal, quickly update their information, or connect with the point of contact for the CAP as needed. For the CAP website to be a one-stop-shop, we recommend that it include the formal name of the CAP, the mission statement or value-proposition, the TRAILS initiatives being offered as a part of the program (e.g., alumni spotlights, upcoming events), and a supportive message to alumni quoted from a top executive. For instance, on the Citi Alumni Network webpage, the CEO of Citigroup, Inc. has the following quote alongside their picture, "Even after we move on in our careers, the time we spent at Citi connects us all. Our Citi Alumni Network provides you with opportunities to stay in touch with our firm, network with fellow alumni, find new opportunities and continue contributing to – and benefitting from – the rich legacy you helped build".

The sustainability of the CAP can be enhanced by integrating it with existing HR systems that allow the transition from employee to alumni to be automated. A third-party alumni software provider or a customer relationship manager (CRM) vendor can offer a solid platform that flows as an extension of employee HRIS allowing data to be more easily collected, stored, shared, and utilized. These platforms allow for more personalized and customized messaging to specific alumni, rather than all mass mailings (which tend to be less effective).

Key Questions for Stage 3: developing the CAP and planning for sustainability

- *Where* will the CAP fit in the organization's structure? Do the goals of the CAP align with Human Resources, Marketing, and/or Business Development?
- *Who* will manage the CAP? What is the role of the CAP leader? Who will be on the CAP team and in what capacity (formally as well as alumni volunteers and program champions)?
- *How* will the CAP be communicated and sustained over time? What is the name of the CAP (e.g., alumni network, community, etc)? How will information will be shared (e.g., newsletter, alumni webpage, postcards, social media), and how will the program be managed (website development, alumni portal, integration with talent management software and data)?

STAGE 4: IMPLEMENT THE CAP

Once all essential preliminary decisions are made in Stages One through Three, it is time to implement the program (Stage Four). Implementation involves establishing the timeline and inviting alumni to be members of the program. During the implementation stage (Stage Four), organizations may question *when* to introduce CAPs to employees and *who* is the able to join in an effort to execute the program in support of the CAP objectives.

When will the CAP be introduced and when will activities take place?

The CAP should be introduced and shared with employees early with a clear value-proposition campaign determined

from all of the data previously collected. The CAP can be highlighted throughout the employee lifecycle such as during recruitment, onboarding, training, and beyond. Including current employees in conversations about the CAP, or as members, serves as an important signal to employees to know that they will always be connected to the company, even if they continue their career elsewhere. This also provides a platform for current and former employees to interact, which often leads to helping fill future business needs.

A schedule for when certain alumni activities should occur needs to be developed intentionally. This begins by identifying a plan for contacting alumni, events, and data collection. A calendar of any initiatives that might occur on a monthly or annual basis can be beneficial, including information on how often and when newsletters will go out and the website will be updated as well as tracking recurring events. Several CAPs offer quarterly happy hours, annual alumni reunions, or bi-annual alumni survey. These initiatives should be timed strategically and aligned as a part of a comprehensive CAP.

Next, scheduling CAP initiatives involves identifying major touchpoints when the CAP will prove valuable to employees and alumni, often referred to as milestone moments" or "moments that matter". People's lives, preferences, and needs change, so someone who is not engaged one moment, might be engaged the next. Natural touchpoints for employees may align with employee tenure, such as service anniversaries or completion of a degree or certification. These touchpoints provide opportunities for CAPs to connect with a personalized message recognizing a particular milestone. However, Kathi Enderes from the Josh Bersin Academy, cautions that it is important to also acknowledge the smaller, day-to-day moments where an individual might desire support, respect, and acknowledgement as well.

It is equally important to recognize when the timing and method of engaging alumni may not be ideal. People may not be as receptive to being engaged alumni at the point of departure when stress and emotions tend to be heightened. For instance, when they are dealing with sensitive issues like being let go they may not be feeling such a strong connection to their former supervisor and colleagues. Thus, considering when to first connect with an alumnus after departure should be an intentional choice. In some industries the data show that five months is the sweet spot for contacting alumni after they leave because that timing has the highest conversion rate of engaging alumni. This would be the appropriate time for the CAP (or if there is an assigned buddy) to send a message checking in to see how they are doing, wishing them well, and asking if and how they would like to stay connected through the alumni program.

Who will be invited to the CAP?

Historically CAPs tended to be designed to be company-serving and often only top talent in executive level or partner positions were invited to be members. Although some companies still only invite people in certain high-status roles to join the CAP, many programs now have shifted to focus on inclusivity and indicate that CAPs should not give preferential treatment. There is a strong emphasis on the importance and value of inclusion in these programs such that why someone left, how they performed, or where they went should not be used as criteria for inviting someone to join a CAP.

We recommend that CAPs should be available to all levels of employees and alumni, with few exceptions. The exception being employees who leave in bad standing from engaging in fraudulent, unethical, or illegal work behavior, which typically accounts for only a small percentage of leavers. While it is natural to question why a poor performer or someone going to a competitor would be invited to the CAP, there can be value in staying in touch with any alumni, even those who may not have been the right fit internally. As mentioned above, they may become a brand advocate, source of employee referral, customer, or corporate partner while the firm may be a future employer or network opportunity. Moreover, McKenzie-Gould suggests that when young employees leave entry level retail positions, their future is full of potential and unknowns. As such, maintaining the connection may be mutually beneficial in the future.

It can be dangerous to cherry pick alumni or have exclusive events because that can cause damage to the brand and potentially harm alumni goodwill. This is especially concerning when only inviting people in high-status jobs. We know from research that women and minorities are underrepresented in high status jobs, and so differentiating by status might inadvertently discriminate against certain groups, potentially leading to adverse impact. This is especially concerning if it reduces the likelihood of them being invited to professional networking events.

Key Questions for Stage 4: implementing the CAP

- *When* will the CAP be introduced and when will activities take place? What is the schedule of CAP activities and initiatives? What touchpoints and timing for communication with alumni will be identified?
- Who will be invited to the CAP? What criteria will be used for inclusion or exclusion?

STAGE 5: EVALUATE THE CAP AND RESULTS

The last stage of the CAP design process is evaluation. In Stage 5 (Evaluate), CAP evaluations should be designed to provide both formative evaluations that include data and information to improve the program as well as summative evaluations to assess the overall effectiveness of the program relative to its objectives. In typical training programs, Kirkpatrick's levels of evaluation are used to collect information on reactions (satisfaction), behaviors (engagement), and results (capital). We use these levels to suggest alumni outcomes important to consider in evaluating a CAP. The level of evaluation should be determined by the objectives and characteristics of the CAP. For instance, if the purpose is non-monetary, intangible, emotional community building the evaluation would be different than if the goal is to demonstrate the value and ROI of the CAP to the

company. Even though this is the final stage, evaluation should be carefully planned early in the CAP design process with an expert who can ensure the evaluation is both reliable and valid.

Employee and alumni satisfaction reactions

Perceptions of the CAP should be measured to determine employee and alumni reactions and feedback. Keeping a pulse on satisfaction is important to determine and continuously assess if the program is meeting the employee and alumni needs. Satisfaction can be measured through a few different metrics:

- *Satisfaction Surveys:* Satisfaction with the overall alumni programs can be assessed using pre-established survey items.
- *Employee and Alumni Event Reactions:* Otherwise known as 'smile surveys', reactions assessments can gather immediate feedback on employee and alumni activities and events.

Employee and alumni engagement behaviors

In addition to reactions, the CAPs should be evaluated by the behaviors they influence. A successful CAP is likely to result in alumni engagement and involvement in alumni activities. We identify several types of metrics to capture alumni engagement from least involved to most involved. The goal is to convert engagement from one level to the next (e.g. – moving from opening emails to participating in events).

- *Registration Rates:* the number and/or percentage of eligible individuals who officially join the alumni network.
- *Open Rates:* the number and/or percentage of eligible people who open newsletters, emails, and other information shared via the CAP.
- *Participation Rates:* the number and/or percentage of eligible individuals who participate in any particular CAP events.
- *Volunteer Rate:* the number and/or percentage of eligible individuals who volunteer to help with CAP events and activities.

Business driver results

Last, a successful CAP should result in outcomes relevant and important to the business. Legnani, from the Citi Alumni Network, indicates that CAPs are "an opportunity for business, an opportunity for re-hiring, and an opportunity to retain access to a qualified panel of invested experts including retirees. There's real ROI to be seen when this initiative is geared into a company's DNA." Yet, many CAPs are not evaluating their programs for ROI, and future research that clearly indicates the relationship between CAPs and realized value to the firm is needed. We suggest that if it aligns with the objectives of the program, firms should measure ROI and identify metrics for evaluating some of these business drivers, including the human capital, reputational capital, and social capital results of CAPs.

Human capital: talent acquisition

Human capital, an employee's knowledge, skills, and abilities that are valuable to an organization, has been recognized as a leading factor in establishing a competitive advantage. A positive alumni experience positions an employer to acquire talent cost-effectively, quicker, and with higher yield and retention rates through employee and alumni referrals and top performers who leave and return to the organization as boomerang employees. There are several ways to measure the value of CAP on talent acquisition. We recommend the following:

- *Boomerang Quantity*: the number of alumni hired back by the firm.
- *Boomerang Quality*: the performance levels of boomerang employees.
- *Boomerang Cost Savings*: the reduction in cost per hire, time per hire, and time to productivity when hiring alumni.
- *Alumni Referrals*: the number of individuals referred by alumni.
- *Alumni Referral Cost Saving*: the reduction in cost per hire and time per hire when hiring alumni referrals.

Reputational capital

The views of current and former employees about their alumni experience influences the reputation of the company. One of the primary reasons that companies offer CAPs is employer brand advocacy. The metrics most common for measuring reputational capital and highlighting brand advocacy resulting from CAPs include:

- *Net Promotor Score:* the likelihood alumni would recommend a company to a friend or colleague.
- *Glassdoor Ratings:* the rating provided by former employees of the firm on what it's like to work there.

Social capital

A positive alumni experience enables the company to foster ongoing relationships and capture valuable knowledge and resources from those relationships. Partnerships between alumni and the organization can provide knowledge and business back to the firm through client relationships, suppliers, and mentoring relationships. Social capital can be evaluated by measuring structural, affective, and cognitive social capital and the associated value to the company.

- *Structural capital*: the number of relationships between employees and alumni.
- *Affective capital*: the amount of trust and identification between employees and alumni.
- *Cognitive capital*: the number of relationships that share knowledge, including connections with suppliers, clients, mentors, and other partners.
- *Revenue from social capital:* the revenue brought into the firm from partnerships.

Key Questions for Stage 5: evaluating the CAP

- How will you evaluate whether the CAP is successful? How will you ensure the evaluation design is reliable and valid?

- What reactions, behaviors, and results will you measure based on the objectives of the CAP?

CONCLUSION

Employers and employees today are working under an evolved employment model characterized by far more movement and flow than in the past. While retention is and should be a primary focus of talent management, it is shortsighted to assume it is the only appropriate approach for managing employee mobility. Organizations have an opportunity to make the most of the inevitable increase in employee mobility by taking a broader perspective of talent management and extending the employee lifecycle to include alumni management. This can be achieved by integrating CAPs into a talent management strategy that considers career management, employee exit, offboarding, and beyond.

In this paper, we provide a systematic and comprehensive approach for designing CAPs to manage talent as it leaves, maintain connections with former employees, and provide paths back into an organization. Using an instructional system design process and our TRAILS typology, we provide a guide that organizations can use to determine what should be considered at each stage of a CAP's development given a company's unique characteristics and needs. Although we introduce the TRAILS typology for CAP design, it may be used more broadly in programming to support any career transitions. For instance, the TRAILS typology may be useful in repatriation, internal relocations, or other types of movement within or across firms. Offering these programs as part of the employee lifecycle demonstrates the ongoing support companies can provide individuals on their career path and build a community of employees and alumni.

CREDIT AUTHORSHIP CONTRIBUTION STATEMENT

Alison M. Dachner: Conceptualization, Methodology, Investigation, Writing – original draft, Writing – review & editing, Visualization, Project administration. **Erin Makarius:** Conceptualization, Methodology, Investigation, Writing – original draft, Writing – review & editing, Visualization.

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