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Onboarding Your New Employee: Best Practices and Successful Tips

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Overview

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 - Requesting Accesses
 - Building a Training Timeline
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Context

Onboarding is more crucial than we think, especially now that we are working in a Hybrid mode which can make the first days more impersonal... favouring in-person interactions rapidly in the first days will help!

The current market makes it even more imperative to have a robust, partly standardized and partly tailored onboarding process to retain our newly acquired employees, knowing how long, tedious and onerous the hiring process is!

Organizations with a strong onboarding process improve **new hire retention by 82%** and **productivity by over 70%**. Companies with weak onboarding programs lose the confidence of their candidates and are more likely to lose these individuals in the first year. (source: Brandon Hall Group).

Employees who felt their onboarding experience was effective were over 29 times more likely to feel satisfied with their jobs.



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What Onboarding well means to employees...



Source: The New Definitive Guide to Onboarding (BambooHR)



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The Onboarding Responsibility

- HR team (Local Administrator/Staffing Advisor/Central HR):
 - communicating with candidate,
 - making the offer,
 - presenting benefits and perks, policies and/or collective agreements,
 - Welcome Day,
 - provide Managers with checklist,
 - Survey new employees on their experience,
 - Exit Interview and Survey
 - etc.
- Manager
 - welcoming employees prior to first day (via e-mail) and as they start,
 - tailor onboarding to their department and to new employee's needs,
 - introducing them to their peers & propose a buddy system,
 - follow [HR checklist](#) & respect the probation/trial period review
 - Create a training schedule and hold follow up meetings,
 - etc.
- Colleagues
 - welcome new team member,
 - participate in training the new member
 - etc.

It's a team effort!



Welcome Day

All new Administrative and Support hires will meet with HR for a information session (1.5 hour / every second Monday)

- Welcome new employees, ice-breaker activity
- Explanation of the structure and presentaion of the org chart of the FMHS and HR Team
- Reminders about Workday : making sure all information in the employee profile is updated in WD : ID, SIN number, banking information, benefits election
- Information about the Workday training session for all new employees
- Presentation of the benefits and perks offered at McGill
- Visit of the HR FMHS website : Forum, training, onboarding ...
- Diversity and Substainability Information
- Staff directory, who to contact in FMHS and Central
- Q&A



A Manager's Checklist


- A. Onboarding E-mail
- B. Requesting Accesses
- C. Building a set of Objectives
- D. Building a Training Timeline
- E. Probation or Trial Period Review



A- Onboarding E-mail Example

In this example, the new employee is an HR Administrator:

[Onboarding E-mail](#) 

Ensure you forward them a link to the Onboarding tab of the FMHS HR website which can be found [here](#). 

Ask about any Special Accommodation needs.



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B- Requesting Accesses

The hiring manager ought to request accesses to be granted as soon as the new staff member has accepted the offer on Workday (before their start date if possible).

For most employees:

- McGill ID Cards → requested via Workday by the new staff member
Casual employees, e.g. AMUSE will need building access via proxy → department staff
- Requesting computers and screens/ Setting up computer profile/laptop (e.g. Drive access) → help.medit@mcgill.ca
- Phone lines → IT Services – IT Communications 514-398-6088
- Building access is granted to successfully hired staff (in Workday). For special building access, visit <https://www.mcgill.ca/medhealthsci-buildings/access> (Contact bldgsupport.med@mcgill.ca)
- U Print access → local Finance team
- Pcards → local Finance Officer
- Minerva Finance tab (for staff to complete PA adjustments) → brenda.ortizreyes@mcgill.ca

For HR and AA staff members, managers will need to take these additional steps:

- IRCC Portal access → veronica.nahorniak@mcgill.ca
- MEMA access as HR or AA Administrator(s) → deanery at submit2hr.med@mcgill.ca
- Workday access/rights → submit2hr.med@mcgill.ca → (for AA staff) Jade Archina - academicsupport.med@mcgill.ca
- For Finance staff members, contact brenda.ortizreyes@mcgill.ca. FMHS Finance takes care of onboarding new Finance staff members.



C- Review Job Description

When	What
Before the employee's arrival	<p>1-Manager and Trainer go over the JD and build:</p> <ul style="list-style-type: none">• a list of tasks (objectives) which will be performed in the next 3 months• a list of training material;• a list of key players in the employee's onboarding, training and support.• a training timeline (with breaks and time for information consolidation); <p>2-Manager will liaise with others (trainers/teammates/clients) to discuss/book meetings, info sessions, training, social events, etc . It takes a village for a healthy onboarding and training!</p> <p>3-Manager designates a work buddy, someone who:</p> <ul style="list-style-type: none">• has similar responsibilities or is a key player in the unit;• Is either from within the unit or outside: e.g. someone at Deanery, or another AEC or unit• Is clear on their added responsibility and is interested in the role.
Upon the employee's arrival	<p>Manager goes over JD (and objectives for the next 30-60 working days):</p> <ul style="list-style-type: none">• Clarify tasks, give examples;• Link JD with teammates, resources, filing system, etc;• Go over training schedule; <p>This will be critical and crucial for the manager to complete the Probation / Trial forms.</p>



Setting Robust & Fair Objectives (Probationary/Trial Review)

Factors that will affect employee-specific objectives:

- 1- Peak Seasons in tasks (e.g. TA hires and Terminations)
- 2- High Staff Absences (e.g. Summer vacancies)
- 3- Needs of the unit (e.g. the unit needs to catch up on a specific task)

Tips:

- ❖ Should objectives need to change, notify the employee, update your shared objectives (in person/call followed up by in writing).
- ❖ Make sure to update your timeline and training plans.
- ❖ Your objectives should be structured and well understood.
- ❖ Contact the HR team if you need help with feedback to give or if the employee's trial or probation period is not going as planned.

Forms can be found [here](#) and a specific training for probation and trial period [here](#)



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D- Building a Training Timeline

Tips:

- ❖ 1- Aim for training to last a maximum of 60-75 mins at a time. Integrate breaks.
- ❖ 2- Phases in training:
 - Phase 1: Employee receives theoretical training on task (e.g. *Hire of Mpex employee*)
 - Phase 2: Trainer goes through 2-3 more Mpex hires while explaining every step to the employee;
Allow for Q&A.
 - Phase 3: Employee takes on the next 2-3 Mpex hires:
 - Analyses the request, collects relevant documentation and information;
 - Presents analysis and upcoming steps to trainer for approval/correction;
 - Completes Hire after having checked with their trainer.
 - Phase 4: Trainer deems the employee ready to act on future Mpex hires on their own and are available for ad hoc Q&A
- ❖ 3- If the employee is having a difficult time with this task, you will want to make sure to capture this in the mid probation/trial review (and final, if it remains a problem).
- ❖ If the manager is not the main trainer, they need to have weekly pulse checks with trainer(s) and employee.



Building a Training Timeline (cont'd)

❖ 3- Here is an example of what the first month can look like for the new employee.

Monday	Tuesday	Wednesday	Thursday	Friday
<p><u>Welcome Day:</u></p> <ul style="list-style-type: none"> • HR (every second Monday) • 1:1 manager & employee • Tour of office/building • Employee has 15-30 min meetings with team mates and other stake holders • Introduce buddy • Lunch with employee (HWA/employee or teammate – optional for employee) • Employee settles in office: building, gets laptop, drive, e-mail sorted out <p>Employee consolidates training (1 hour)</p> <p>1:1 manager or buddy or HR (Q&A)</p>	<p><u>1:1 manager & employee:</u></p> <ul style="list-style-type: none"> • Go through objectives • Timeline • Training schedule & trainer(s) • Milestones & mid and final review dates and meetings <p>Training to get employee acquainted with systems:</p> <ul style="list-style-type: none"> • Banner training • Workday training • Finance training • Other system's training <p>Employee consolidates training (1 hour)</p> <p>1:1 manager or buddy (Q&A)</p>	<p>Training to get employee acquainted with systems (part 2)</p> <p>Employee consolidates training (1 hour)</p> <p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p> <p>Employee consolidates training (1 hour)</p> <p>1:1 manager or buddy (Q&A)</p>	<p>Training to get employee acquainted with systems (part 3)</p> <p>Employee consolidates training (1 hour)</p> <p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p> <p>Employee consolidates training (1 hour)</p> <p>1:1 manager or buddy (Q&A)</p>	<p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p> <p>Employee consolidates training (1 hour)</p> <p>1:1 buddy (Q&A)</p> <p>Employee mandatory readings/training:</p> <ul style="list-style-type: none"> • "It takes all of us" • Code of conduct
<p><u>1:1 manager & employee:</u></p> <ul style="list-style-type: none"> • Feedback on 1st week • Any surprises or suggestions? • Any points to be clarified? • go over this week's schedule/changes & training/objectives <p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p> <p>Employee consolidates training (1 hour)</p>	<p>Self-Study time: Phase 3 of training</p> <p>Touchpoint with Employee: manager/trainer goes through real cases (phase 2)</p> <p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p> <p>Employee consolidates training (1 hour)</p>	<p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p> <p>Employee consolidates training (1 hour)</p> <p>Self-Study time: Phase 3 of training</p> <p>Touchpoint with Employee: manager/trainer goes through real cases (phase 2)</p>	<p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p> <p>Employee consolidates training (1 hour)</p> <p>Self-Study time: Phase 3 of training</p> <p>Touchpoint with Employee: manager/trainer goes through real cases (phase 2)</p>	<p>Touchpoint with Employee: manager/trainer goes through real cases (phase 2)</p> <p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p> <p>Employee consolidates training (1 hour)</p>

Building a Training Timeline (cont'd)

❖ 3- Here is an example of what the same month would look like for the **manager/main trainer**.

Monday	Tuesday	Wednesday	Thursday	Friday
<p><u>Welcome Day :</u></p> <ul style="list-style-type: none"> • HR (every second Monday) • 1:1 manager & employee • Tour of office/building • Introduce buddy <p><u>1:1</u> manager or buddy or HR (Q&A)</p>	<p><u>1:1 manager & employee:</u></p> <ul style="list-style-type: none"> • Go through objectives • Timeline • Training schedule & trainer(s) • Milestones & mid and final review dates and meetings <p><u>1:1</u> manager or buddy (Q&A)</p>	<p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p>	<p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p>	
<p><u>1:1 manager & employee:</u></p> <ul style="list-style-type: none"> • Feedback on 1st week • Any surprises or suggestions? • Any points to be clarified? • go over this week's schedule/changes & training/objectives 	<p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p>	<p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p>	<p>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</p>	<p><u>Touchpoint with Employee:</u> manager/trainer goes through real cases (phase 2)</p>

Building a Training Timeline (cont'd)

❖ 3- Here is an example of what the first month would look like for the **secondary trainer & buddy**.

Monday	Tuesday	Wednesday	Thursday	Friday
<p><u>Welcome Day:</u></p> <ul style="list-style-type: none"> • Introduce buddy • Lunch with employee (HWA/employee or teammate – optional for employee) 		<p><u>1:1</u> manager or buddy (Q&A)</p>	<p><u>1:1</u> manager or buddy (Q&A)</p>	<p><u>1:1</u> buddy (Q&A)</p>
<p><u>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</u></p>				<p><u>Training on 1 task based on objectives set for the probation/trial review. (2 hours with a break)</u></p>



Best Practices & Fun Ideas to Try

Ensure their office is clean, inviting, including office supplies

Create a glossary with the most frequently used acronyms or internal words and phrases

Present the person in a personalized way with an internal email and on the social networks

Point the person to the various internal contacts and their field of expertise, set up meetings with them within the first few weeks

Plan a 15-minute coffee break or a lunch with the whole team to welcome the person

Ask colleagues to create a fun little resume that introduces them professionally but also personally with their interests and hobbies



Ask the employee's favourite non-alcoholic beverage and place it on their desk for arrival with a little welcome note

Anything that makes your dept or your leadership style unique!



Next steps

After the probation is completed:

- Ask for retroaction on the onboarding process and the training received
- The HR team can survey the new employee to seek retroaction on the onboarding process and adjust process or make recommendations, as needed
- Continue frequent 1:1 meetings and team meetings;
- Complete a Stay Interview with new employee at the 11-18 month mark (see training [here](#)) 
- Prepare for the annual Performance Dialogue for MPEX employees (see instructions [here](#)) 



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