

Manager's Onboarding Guide



THE UNIVERSITY OF BRITISH COLUMBIA

Manager's Onboarding Guide

How to use this manager's guide

A helpful onboarding plan will be unique. There may be onboarding resources relevant to your new hire based on their role, team, department/unit, work arrangement and so on.

As their manager, you will best know what will be useful to them.

This **Manager's Onboarding Guide** is designed to be a starting point for your local onboarding plan and help guide your interactions as a manager with your new hire during their first weeks.

As you review this guide, review and customize the **New Hire Onboarding Checklist template** to meet local needs and provide to your new hire on or prior to their first day.

For a copy of this Manager's Onboarding Guide and the New Hire Onboarding Checklist template, visit UBC HR's New Employee Checklist and Orientation page (CWL required).

Considerations when updating your New Hire Onboarding Checklist

Add relevant information to customize a checklist based on your situation and the new hire's role, such as:

- Is your new hire internal or external to UBC?
- Will your new hire be starting in person, remote, or blended? Consider how this will impact your new hire and the team – from workspace setup to communication and collaboration. For remote work information and resources for managers and leaders, visit UBC HR's [Remote Work at UBC for Leaders](#) page.
- Are you going to set your new hire up with a peer buddy? If desired, select a team member to act as a peer buddy for new hire. A buddy is someone who will introduce team culture, and who the new hire can connect with when they have questions. The buddy should also be available for informal 'coffee chats' to help create connection and trust. Team member should have a clear understanding of their role and time commitment.
- How are you going to help your new hire build their social networks at UBC?
- Will your new hire [manage or lead](#) people?
- Will your new hire have [financial responsibilities](#)?
- Will your new hire have [teaching responsibilities](#)?
- Will your new hire be in a student-facing role? [Student information tools and access](#): Those in student-related administrative and instructional roles should request access for the Faculty Service Centre (FSC) or Student Information Service Centre (SISC).
- Will your new hire require an accessibility related measure?

Checklist for managers

Prior to first day

- ☐ Complete [onboarding setup in Workday](#) (This is the responsibility of the person who initiated the hire.)
- ☐ Customize the **New Hire Onboarding Checklist** template.
- ☐ Request appropriate [hardware](#) and [software](#) two weeks prior to start. If applicable, ensure their hardware/software is set up for [remote work](#).
- ☐ Invite your new hire to all team meetings, mailing lists and any online channels used by your team for project work and social connection.
- ☐ Email the team introducing your new hire. Encourage team members to schedule welcome conversations (virtual or in person) during the new hire's first few weeks to help build their social networks at UBC.
- ☐ Team introductions: Have team members prepare a short bio of themselves with a photo, their contact details and preferred way to get in touch throughout the day. Share this with the new hire in a welcome message on their first day.
- ☐ Call or email your new hire to share valuable information related to their first day (what time to arrive or start work, any scheduled plans for their first day, etc.), and answer any questions.
- ☐ Schedule daily check-ins during their first week. Consider that “overcommunicating” is helpful in this time of uncertainty. Anything less could lead to a sense of isolation for new hire.
- ☐ Additional considerations:
 - Does your new hire require additional UBC property to be issued? Be sure to arrange these in advance of their start date. Examples could be:
 - A [UBC Visa](#) card
 - I.D. cards, building access, and time cards, keys and codes
 - Office equipment for remote use (e.g. computer, [cell phone](#), etc.)
 - Materials (e.g. binders, reference materials, files, textbooks, etc.)
 - Work tools, equipment and protective gear, etc.
 - Uniforms, security identification, name tags, etc.
 - Does your new hire need to enroll in the [Occupational and Preventive Health Program](#)?

Within the first week

- **Day 1:** Meet with your new hire (video conferencing recommended for virtual new hire).
 - Welcome and express excitement about new hire joining team.
 - Provide your customized New Hire Onboarding checklist.
 - Introduce team landscape as well as projects/initiatives that the new hire will be working on and responsible for.
 - Share your working style and work expectations with new hire.
- Provide 3 hours to complete Workday Onboarding tasks and to-do's including direct deposit set-up, [benefits enrolment](#) and [required training courses](#). Remind new hire that it is important all tasks are completed within a timely manner.
- Encourage new hire to review UBC [Orientations & Onboarding website](#) and [Orientations & Onboarding WPL catalog](#) for resources designed and curated by the UBC Orientation & Onboarding team.
- Offer a tour of building (e.g. lunch room, bathrooms, muster points, first aid, etc.) and/or campus location.
- Encourage your new hire to [ergonomically set-up their workstation \(on campus and remote\)](#).
- Encourage your new hire to create an on-brand [email signature](#) using this generator.
- Team introductions: Schedule a virtual or in-person team meeting for introductions (when possible, use video conferencing).
- Provide overview of the technology available and what the team uses.

Within the first two weeks

- Set up regular check-ins with your new hire. Some important conversations to have include:
 - Share general expectations.
 - See how new hire is transitioning to their new role.
 - Introduce the top priorities of the new hire's role and where they should be focusing their efforts to start. Discuss ongoing projects and progress.
 - Share team's strategic priorities and goals, and how the new hire also contributes to these. Explain how the teams goals and strategic priorities help to achieve the goals within UBC's Strategic Plan.
 - Review the performance conversation process. Together, identify and set performance goals for the year. Ensure these goals are reasonable and achievable. Check in to see how new hire is tracking towards these performance goals.
 - If the new hire has direct reports, review their responsibilities in goal setting and the performance conversation process.
- Share team administrative processes and procedures (e.g., sick leave, vacation/attendance tracking, purchasing, etc.)

- ❑ Have team members to schedule peer-instructional sessions to train or transfer knowledge on relevant applications and processes.
- ❑ Encourage your team to connect socially with new hire in person or over online collaboration channels.
- ❑ Provide tasks that can be accomplished in the short term. Consider what level of access and equipment the new hire currently has (consider an outcomes-based approach to work over hours worked).
- ❑ Review role specific information and documentation together. This may also include your portfolio's organizational structure.
- ❑ Provide new hire with time to become familiar with the following initiatives:
 - [UBC's Strategic Plan](#)
 - [Focus on People](#)
 - [Inclusion Action Plan](#)
 - [Indigenous Strategic Plan](#)
 - [Wellbeing Strategic Framework](#)
- ❑ Provide new hire with time to review the following policies and procedures:
 - [UBC Statement on Respectful Environment](#)
 - Policy GA4 – [Records management](#)
 - Policy SC1 – [Health and Safety](#)
 - Policy SC5 – [Snow](#)
 - Policy SC7 – [Discrimination](#)
 - Policy SC13 – [At-Risk Behaviour](#)
 - Policy SC14 – [Information Systems](#)
 - [Security Standards](#)

Within the first three months

- ❑ Prepare your new hire for a [performance conversation](#) within their probationary period to identify areas for growth and goals. This process should be largely driven by the new hire, with the supervisor as the coach and partner. This page suggests questions to consider asking your new hire.

Troubleshooting

If your new hire has issues with pay, benefit enrolment, pension enrollment, contact the [Integrated Service Centre](#) for troubleshooting or support.

Share your feedback

If you have any questions or feedback on this resource, please contact workplace.orientations@ubc.ca.