Global Onboarding Initiative

Introduction

The Global Onboarding Initiative was launched in September 202X, in response to the need to provide New Hires with business unit information not previously provided.

This initiative was previously launched in January 202X, with a primary focus on the sites, but it was placed on a temporary pause due to organizational restructuring. It was later decided to redirect the focus to address the needs of the entire business unit as opposed to the umbrella company.

2021 Proposed Plan

The action items proposed during the initial launch are listed in the following below (Fig. 1):

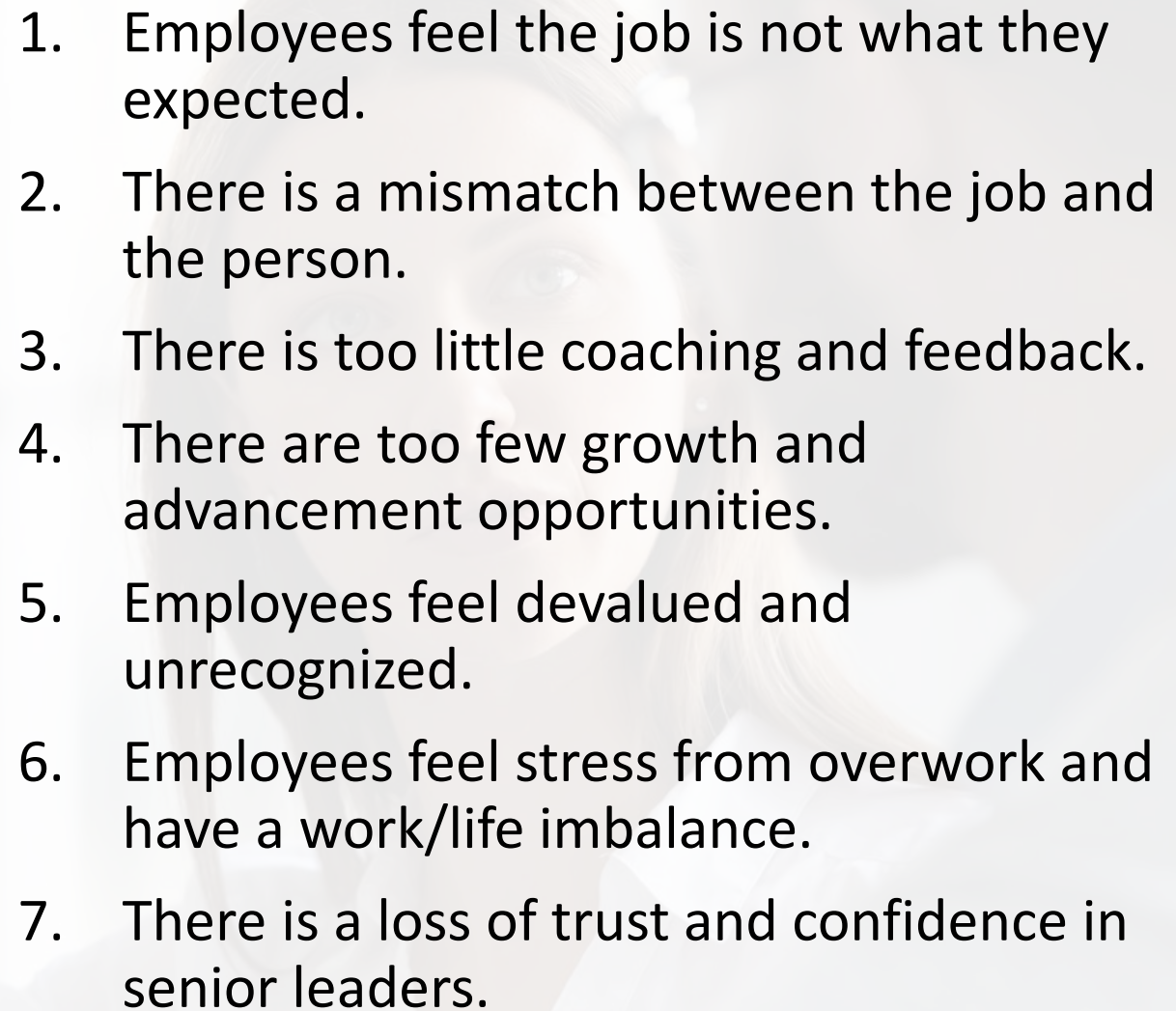| Action Item	Owner	Due Date
Establish global squad for content reviews	▓▓▓▓	Jan
Create role-specific New Hire Checklists	▓▓▓	End Mar 2021
Create standardized 30-60-90 day review assessment • ▓▓▓ to host training for managers on these new global forms	▓▓▓	End Feb 2021
Each department to create introduction videos provide a high level, general overview of their department's role within ▓▓▓ incorporate into e-learning/create second e-learning module	Narissa	End Feb 2021
Create/revise reference guides for local, country-specific systems that can be provided to staff in lieu of reviewing during monthly NEO session.	HR	End Feb 2021
Revise current US New Employee Orientation to be globally applicable • E-learning • Webinar	▓▓▓ Narissa	Phased launch
Identify process by which ▓▓▓ are aware of all new hires (currently only receive info for US)	HR	End Jan
Identify tools for hiring managers to use as they onboard a new hire	▓▓▓▓ / HR	Mar 2021

Business Need

Purpose: *To foster an industry leading Global Onboarding Experience*
Goal Alignment: *WIG 1 People: Reduce Employee Voluntary Turnover from 24% to 20% by December 2021*

The business unit has experienced a high level of turnover over the past few years. Research has indicated that 25% of new hires leave a company within six months of hire.   The cost of losing a new hire is at least three times their hiring. Employee retention has become the number one global talent problem a company faces, and our business unit is among those experiencing this challenge.

Why is the turnover rate so high?

1. Employees feel the job is not what they expected.
2. There is a mismatch between the job and the person.
3. There is too little coaching and feedback.
4. There are too few growth and advancement opportunities.
5. Employees feel devalued and unrecognized.
6. Employees feel stress from overwork and have a work/life imbalance.
7. There is a loss of trust and confidence in senior leaders.

Opportunity Statement

One Global Onboarding solution for all AES roles and departments

Provide an on-boarding experience that introduces new hires to:

- their roles
- the functional departments
- key business-related information
- the Patient Recruitment model; and
- the clinical trial industry.

The Problem

There has been limited introduction to the individual business unit, its culture or the clinical trial industry since the COVID-19 pandemic began.

Business unit information has been provided via stand-alone eLearning training modules and through interaction with managers, stakeholders, and peers, but with no formal or consistent structure across the company has been formally provided.

The Solution

Incorporate a process which provides a working knowledge of the drug development process as well as the business unit model, to increase fluency in the organization and the company's culture, while creating a support network of peers.

Key Objectives

Develop strategies to create a supportive & engaging experience for on-site and virtual onboarding by:

1. Providing an introduction to the business unit

2. Developing a 30/60/90 day onboarding plan for all roles

3. Identifying & assigning onboarding partners (buddies) to all new hires

4. Providing an overview of departmental services and how those services fit within the overarching company goals

5. Providing all new hires an opportunity within the business unit to build and forge relationships with their peers

6. Introducing New Hires to the company culture

7. Aligning training courses and SOPs to all roles

Deliverables

An onboarding framework has been designed to include multiple resources to enhance a new hire's experience. This section details the proposed tools, resources and other deliverables developed to enhance the existing onboarding process.

Deliverable 1

Training Matrix & SOP Course Alignment

Purpose: Gain support from the functional department leads to increase training compliance.

A process was developed to ensure that all training courses and SOPs are properly aligned with each job role to facilitate training compliance

Deliverable 2

New Hire Roadmap

Purpose: *To provide basic expectations during the first 30- 90 days of hire*

This resource is designed to provide new hires with the following:

- basic overview of the onboarding process during the first 30/60/90 days of hire.
- overview of key business and departmental information
- a list of tasks/activities for all new hires
- cross-functional teams / team members that they will interact with
- systems that they need to learn within a specified time frame. (**Appendix E:** New Hire Roadmap)

Deliverable 3

Global Onboarding SharePoint Site

Purpose: *Provide on-line access to key onboarding information*

The Global Onboarding SharePoint site has been designed to provide direct access to "need-to-know" information within the first 30 – 60 days of hire. Links to onboarding documents (job aids, knowledge articles, etc.), training information, departmental videos and other key resource information will be available.

Deliverable 4

Departmental Video Coordination

Purpose: *To provide a personalized overview of the functional departments*

This information will assist new hires in:

- Learning about each functional department and the services that they provide
- Becoming more knowledgeable about the role each department plays in contributing to the role the business plays in the clinical trial process.
- Better understanding how departments fit together and interact with each other.

Deliverable 5

Virtual Onboarding Best Practices

Purpose: *To provide "best practice" procedures and related resources for People Managers & Individual Contributors to guide the onboarding process*

Strategies were developed to create a more effective, supportive, and engaging virtual onboarding process. Tools and resources were developed to define "Best Practices" for People Managers and New Hires and to provide personalized mentoring support to assist New Hires in understanding the business, setting up equipment and accessing key resource information.

Deliverable 6

Engagement / Relationship Building Strategies

Purpose: *To provide tools and resources to facilitate relationship building*

Tools and resources have been developed to support the onboarding process and facilitate relationship building. Primary emphasis is placed on providing resources that foster interaction with their counterparts within their department, as well as others within the parent company.

The tools that were developed are:

- People Manager's Onboarding Checklist
- New Hire Quick Reference Cards

Deliverable 7

New Hire Culture Building Strategies

Purpose: To provide an interactive introduction to the business unit

Instructional Goal: To assist New Hire's in developing a better understanding of the business unit (products/services/solutions)

Conduct three (3) one (1) hour sessions once a month on the 2nd week of the month on Tuesday, Wednesday and Thursday (Fig. 2). These sessions will be designed to **reinforce** the concepts introduced to the employee during the initial onboarding process (via the New Hire eLearning training courseware, manager, on-boarding partner, and fellow team members) and introduce more business focused information.

The second deliverable is to follow up the three (3) one (1) hour sessions with a Team Forum. This session will be held bi-weekly on the 1st Thursday of the following month for 30 days (Fig. 2); then once a month thereafter, over a 90-day period. (Appendix J: Culture Building Strategies)

Culture Building Strategies

Proposed Bootcamp Agenda

Day 1
Welcome To
The Team
(1 hr. session)

- Icebreaker to introduce group to each other (20 min.)
  - 3E's Personified
    1. Excitement
    2. Energy
    3. Enthusiasm
- Review agenda for sessions (5 min.)
- All view ▮▮▮▮ video together (5 min.)
- ▮▮ business overview and your role/part (20 min.)
  - Living the: Purpose, Vision, Mission statements
  - What drives ▮▮▮ & what ▮▮▮ does matters
  - Define Success
- Q&A/discussion (10 min.)

Day 2
Welcome To
The Team
(1 hr. session)

- Greeting and welcome (5 min)
- Fun activity to test ▮▮ knowledge from Day 1 (20 min)
- Who's Who in ▮▮ (20 min)
- Org chart/departmental structure
  - Where to find departmental descriptions
- Where to go for help – HR and IT (5 min)
  - How to submit tickets
  - Who are key contacts
- Q&A/discussion (10 minutes)

Day 3
Welcome To
The Team
(1 hr. session)

- Greeting and welcome (5 min)
- ▮▮ systems overview: short description of key systems like Clinical Conductor, Tableau, RM Blue, etc. (20 min)
- ▮▮▮▮ culture: defining principles, how to be part of building a positive culture (15 min)
  - "Find Your Fit" – Go beyond your role and get involved from your living room (Affinity Groups)
  - Philanthropy – giving back community outreach
  - Yammer
- Culture strengthening activity (10 min)
- Final Q&A and closing (10 min)

Culture Building Strategies

Team Forum Discussions – First 90 Days

Month 1
Bi-weekly (Thursdays)
:45m sessions

- Opportunities to discuss:
  - Technical issues
  - Systems access
  - Documents, training and study assignments
- Interactions would help build connections and shape relationships with other new hires from different teams.
- Opportunity to standardize processes across the network based on feedback.

Month 2
Bi-weekly (Thursdays)
:45m sessions

- Opportunities to discuss:
  - Technical issues
  - Systems access
  - Documents, training and study assignments
- Interactions would help build connections and shape relationships with other new hires from different teams.
- Opportunity to standardize processes across the network based on feedback.

Month 3
Bi-weekly (Thursdays)
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- Opportunities to discuss:
  - Technical issues
  - Systems access
  - Documents, training and study assignments
- Interactions would help build connections and shape relationships with other new hires from different teams.
- Opportunity to standardize processes across the network based on feedback.
- Reporting to qualify findings in order to enhance and improve the onboarding process and make for a memorable member engagements.

Evaluation

A survey will be developed for all new hires to complete at the end of their 90-day onboarding process to evaluate their onboarding experience and determine whether the information received assisted them in becoming more knowledgeable about the company, its culture and their role.

Conclusion

A series of tools and resources have been developed by representatives of several functional departments within the business unit, to close the gaps that were identified. The primary goal is to enhance the existing onboarding experience provided by the business unit. It is our hope that the tools and resources developed will provide a supportive and comprehensive onboarding experience consistently throughout the company. This will assist new hires in experiencing an engaging, positive first impression of the parent company, and the business unit will be positioned to positively reduce new hire attrition rates.

Proposed Action Plan

Incorporate a process which provides a working knowledge of the drug development process as well as the business model, to increase fluency in the organization and the company's culture, while creating a support network of peers.

Suggestions / Recommendations

To establish "Quick Wins" based on the information & resources provided by the workstreams, the following suggestions are recommended:

- New Hire Onboarding Roadmap
- Onboarding Best Practices (for Managers & Employees)
- New Hire Checklists
- Quick Reference Cards
- Peer Mentorship Package

Suggestions / Recommendations

Although we have achieve success in the past with virtual bootcamps. The key to this series will be obtaining support from HR in Identifying resources to support the implementation and facilitation of the Culture Building Onboarding Session. This would entail:

- Recruiting session facilitators
    - Human Resource Representatives
    -

- Scheduling department reps (Sites & Functional) to provide 15 minute overviews on:
    - Systems
    - Procedures
    - Business Impact

- Incorporating additional tools and resources for review
    - SharePoint Onboarding Site
    - Tech Support (onboarding helpdesk)