

Welcome to...

All [on]board! How Toronto Metropolitan University (TMU) onboards financial aid staff

Acknowledging Tkaronto

Toronto is in the ‘Dish With One Spoon Territory.’ The Dish With One Spoon is a treaty between the Anishinaabe, Mississaugas and Haudenosaunee that bound them to share the territory and protect the land. Subsequent Indigenous Nations and peoples, Europeans and all newcomers have been invited into this treaty in the spirit of peace, friendship, and respect.

Tkaronto (Mohawk): *“the place in the water where the trees are standing”*

**How it all
started....**

Onboarding ≠ Orientation

Orientation is a one-time event welcoming new employees to your company.

Onboarding is a series of events (including orientation) that helps new employees understand how to be successful in their day-to-day job, and how their work contributes to the overall business.



www.insperity.com/blog/employee-onboarding-vs-orientation-need/

Hello! I'm Bianca Marryshow.



Consultant: Organizational Effectiveness and Team Development

- Pronouns: she/her/hers
- Manager, Student Financial Assistance at Toronto Metropolitan University (TMU)
- Professional Development Chair, OASFAA
- Education:
 - Bachelor of Arts, Sociology
 - Organizational Leadership Certificate
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Speaking & Professional Leadership



**Toronto
Metropolitan
University**



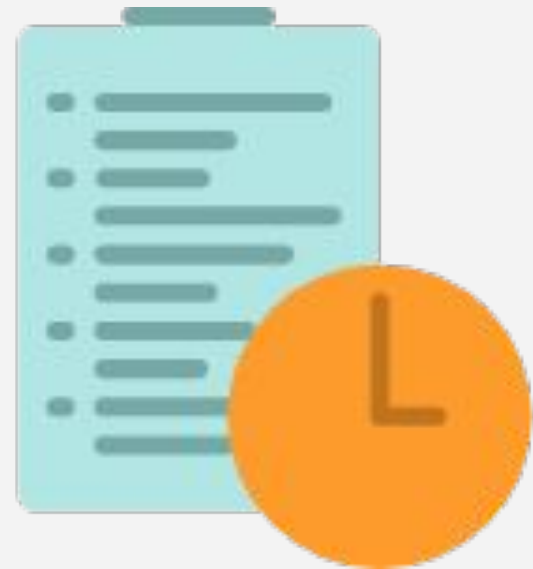
Today's Focus

$$3 \times 6 \times 3$$

3 sections

6 lessons

3 tips



Agenda

What We Do: A Dive Into TMU's FAO Onboarding Strategy

- Before the first day
- Pre-welcome emails
- Tech checks
- Entrance interviews
- Legacy lessons
- Learning and development
- Reaching out to reach in
 - The 1/7 strategy
 - The 3 x 30 strategy

Why We Do It: The Science Behind Onboarding

- Flipped learning model

How You Can Do It: Creating Your Onboarding Strategy

- Kickstarting your onboarding plan



What We Do: A Dive Into TMU's FAO Onboarding Strategy

90 days

for a new hire to begin adding value to your team

Before the first day...

Preparing for the first day starts before the first day.

Do they have...

- ☐ Laptop and equipment
- ☐ VPN or special access tokens

Have you completed HR paperwork for...

- ☐ Assigning employee number
- ☐ Timely pay
- ☐ Ensuring they are “in” the administrative system

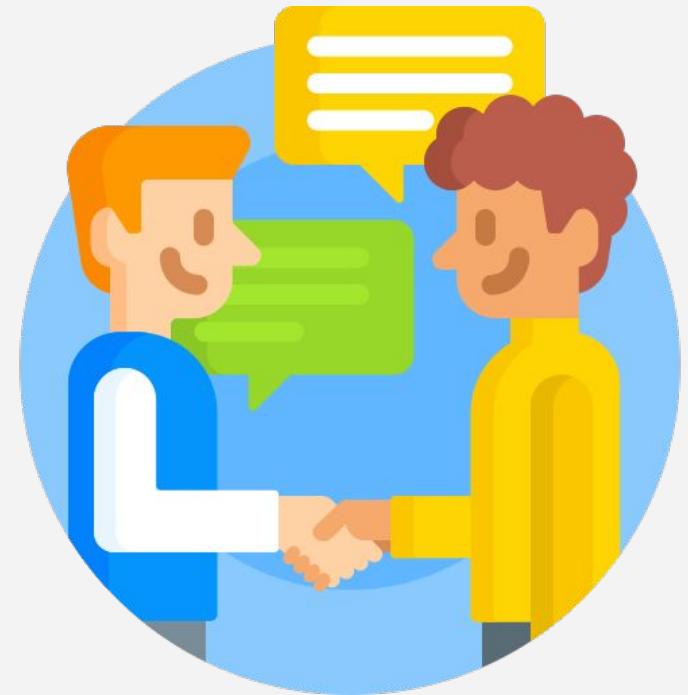


Lesson One: Pre-Welcome Emails

Fear of the unknown is a breeding ground for anxiety and discomfort.

Mitigate this with an email outlining:

- ☐ Dress code
- ☐ Working hours
- ☐ Potential “first day meetings”
- ☐ Weekly norms and rituals
- ☐ How to “log on” and check in
- ☐ Expectations for camera on versus camera off



**Recommend sending this one week before
the new hire's start date!**

Lesson Two: Tech Checks

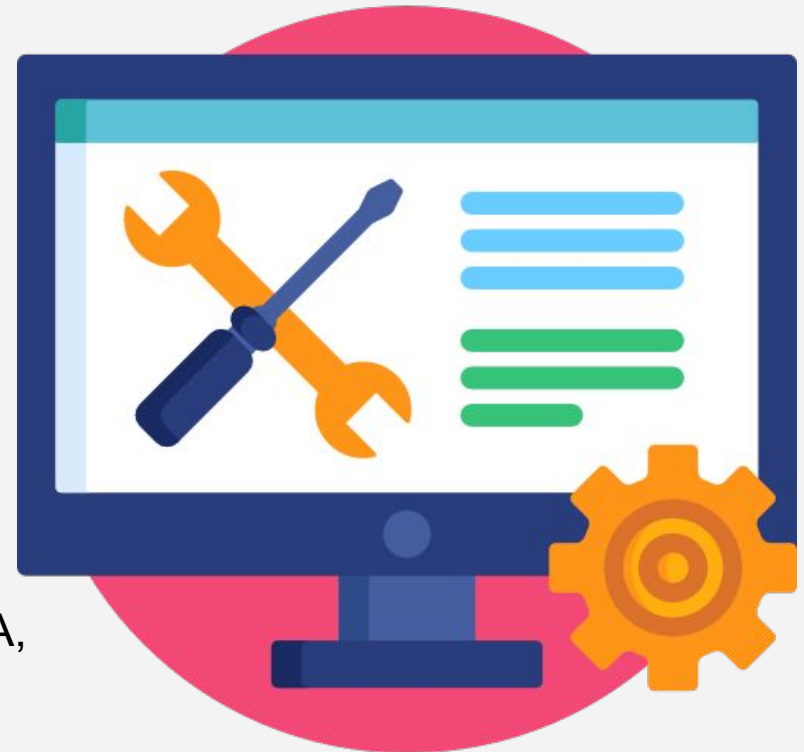
Tech checks are all the softwares and tools new staff require.

System access

- ☐ Inboxes
- ☐ Team drive
- ☐ 2 factor authentication
- ☐ VPN access
- ☐ eHR access

Portal access

- ☐ ONeKey portal
- ☐ Provincial and/or FAFSA portals
- ☐ External memberships (e.g. OASFAA, CASFAA)



Lesson Three: Entrance Interviews

The entrance interview is Google form based; allows for quiet time to develop and write down meaningful, deep responses.

Forms explores:

- Pronouns
- Workplace motivations
- Communication preferences
- Support preferences
- Receiving recognition
- What they hope to get out of the job
- Favourite treat



Lesson Four: Legacy Lessons

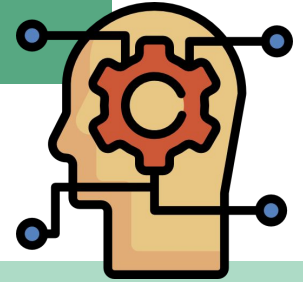
A **legacy lesson** is a mini **history lesson** that **humanizes** your department.

Legacy lessons tackle three things:

- **Who** your department is
- **Why** things are the way they are
- **What** your biggest pain points are



Lesson Five: Learning and Development



L&D broken down into three types: **Self-guided**, **guided**, and **ongoing**.

Self-guided learning is paced and purposeful.
New staff complete:

Department specific learning

- Confidentiality agreement
- Telephone and in-person standards
- Email standards

HR modules

- AODA
- Workplace violence
- Environmental safety
- WHMIS
- FIPPA

Guided learning is formal training on OSAP processes and procedures.

- High level training
- Processes and procedures
- Capturing stats

Ongoing learning is training that is continual.

New hires are asked to browse our:

- SFA website
- Team drive
- SFA calendar/critical path
- Instruction manuals
- OSAP/SFA acronyms and terminology dictionary

Learning and Development cont.



Recently, we incorporated new elements:

Pre-recorded training sessions on soft skills:

- **Customer Service**
 - The silo mentality
 - Expectations and perceptions
 - Managing expectations and perceptions
- **Email 101**
 - Service standards and expectations
 - Creating accessible emails
 - De-escalating upset clients

LinkedIn Learning to further develop soft skills strengths builders:

- **30 days:**
 - Developing a learning mindset
 - Prioritizing your time
- **60 days:**
 - Finding your introvert/extrovert balance in the workplace
 - Managing self-doubt to tackle bigger challenges
- **90 days:**
 - Asserting yourself: An empowered choice

Lesson Six: Reach Out to Reach In

**The 1/7 Strategy:
Day one and day seven are
the two most important initial
touch points for new hires.**

- 15 to 20 minutes
- Unstructured; no questions provided
- Ask about their first day and first full week
- **Let your personality shine through!**



Reach Out to Reach In cont.

The 3 x 30 Strategy



- Check in's on day 30, 60, and 90.
- 20 to 30 minutes
- Semi-structured; have questions, allow open chat time
- **Give feedback! Remember: performance development is an ongoing process.**

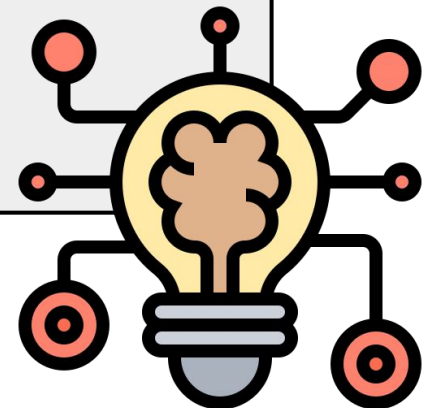
Why We Do It: The Science Behind TMU's FAO Onboarding

Flipped Learning Model

Group Learning → Individual Learning

Provide presentation decks ahead of time to:

1. **Increase transparency**
2. **Foster richer training**



Flipped Learning Model

4 Pillars of F-L-I-P

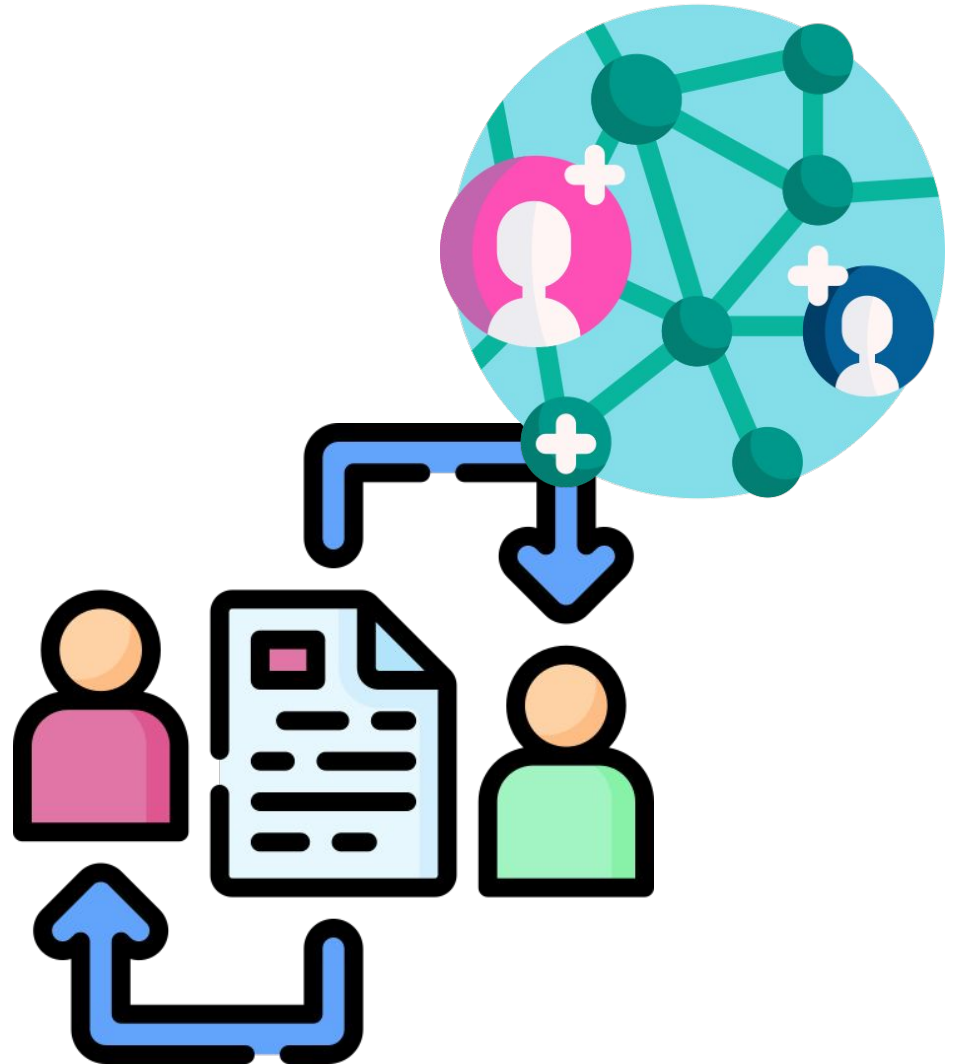
- 1 Flexible environment
- 2 Learning Culture
- 3 Intentional content
- 4 Professional educator



How You Can Do It: Creating Your Onboarding Strategy

Tip One: Engage Key Stakeholders

- Right departments, right people
- Knowledge and resource share



Tip Two: Identify and Document Processes

Three highlights:

1

Determine where your onboarding will live

- a. Google drive
- b. Share drive

2

Audit your processes

- c. Quick wins

3

Document your processes

- d. Step-by-step instructions (written and visual)



Tip Three: Test, Test, TEST!

- **Test instructions yourself**
- **Create time for feedback from both sides**
 - New hire
 - Current staff



What's Next for TMU's FAO?

- Gamifying onboarding via Google sites
- Digital advising



What's Next For You?

**What is one onboarding
goal you will set for
yourself within the next
30 days?**

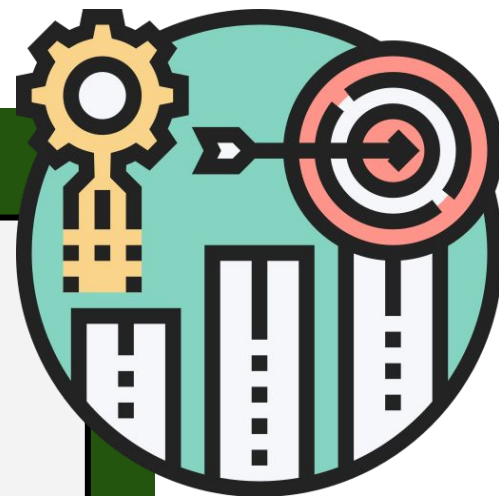
SMARTER and SMARTIE Goals

SMARTER

Specific
Measurable
Achievable
Relevant
Timely
Evaluate
Re-adjust

SMARTIE

Specific
Measurable
Achievable
Relevant
Timely
Inclusive
Equitable



Thank you for joining!

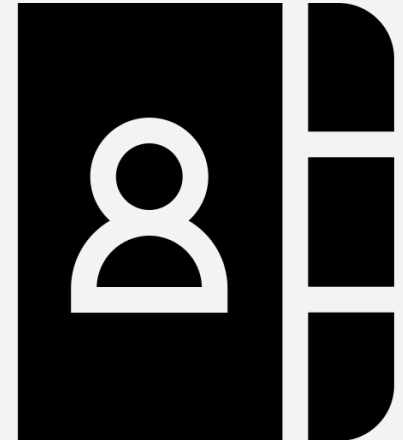
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Questions?