Project Timeline

1. initial concerns raised because of a poor onboarding of a business support agent

2. Jon who is the Manager of support in the US, informed Brandon who is a Business Support supervisor that this onboarding process should be audited so that the newbies in the future have a cleaner onboarding experience

3. Brandon collected the current documentation that a newbie receives on their first day. This includes the Onboarding Day 1 documentation which contains information on setting up your computer and the Onboarding checklist for an analyst on the RELEX Make Support Team

4. Brandon had a meeting with Ashley on 12/05 and this was the progress made...

   - **Badge and Equipment Distribution Timing:**
     - Clarified the badge preparation timelines:
       - **Remote Onboarding:** Badges should be prepared **3 weeks before the start date** to include them with laptops.
       - **In-Person Onboarding:** Badges should be ready **2 weeks before the start date** for pickup from the concierge.
     - Noted that IT sends laptops **1.5 weeks before remote onboarding start dates**, ensuring they arrive on time.

   - **New Role Assignment:**
     - Opal Grover has been hired as the new **Office and Onboarding Coordinator**, effective next Monday. She will assume badge-related responsibilities moving forward, transitioning these tasks from Ashley.

- **Manager Communication Requirements:**
  - Managers must inform the People Team **at least 3 weeks in advance** of a new hire's start date and whether onboarding will be remote or in person. This timeline is critical to ensure smooth preparation for badges, equipment, and first-day planning.

- **Ownership of IT Equipment Setup:**
  - Confirmed that **Nick from IT** will be responsible for shipping computers and peripherals (e.g., keyboards, mice, monitors) to new hires.

- **Future Collaboration:**
  - Ashley plans to meet with Opal to discuss her new responsibilities and ensure a smooth transition of onboarding coordination tasks.

Knowledge to Inform Future Meetings

- **Unresolved Questions for Follow-Up:**
  - Who is responsible for communicating with the new hire about whether they will onboard remotely or in person?
    - Discuss whether this should be handled by the People Team or the hiring manager.
  - Is it standard to offer new hires a choice between remote or in-person onboarding? Should this become part of the process?
  - How is the type of computer (Mac or PC) determined for each new hire? What standard peripherals (keyboard, mouse, monitor, adapters) should be included with their equipment shipment?

- **Pain Points Highlighted:**
  - No current process or assigned person to greet new hires during in-person onboarding.
  - Miscommunication between IT and new hires regarding required technology (e.g., peripherals). Standardization of equipment needs is a critical area for improvement.

- **Next Steps:**
  - Finalize procedures for greeting in-person new hires (assign responsibility and create a checklist).
  - Establish a standardized process to communicate equipment needs to IT, ensuring all required technology is shipped timely and accurately.
  - Work collaboratively with Opal after her onboarding to improve coordination across teams (People Team, IT, hiring managers).

Next Steps

- meet with Nick