**IT Services**

**Induction Toolkit for Managers**

**Oct 2021**

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**Context**

Induction is not primarily about skills training – it’s more about the basics (knowledge and practical stuff) that you take for granted when you’ve been around for a while – everything from what’s in the ITS Strategy to where the toilets are…

This practical guide is intended to help you plan successful induction programmes for your new staff; it may seem like a lot of work when we are all so busy, but investing this time and effort up front will mean that they will have increased knowledge and confidence to be up and running independently much more quickly and productively – resulting in less overall dependence on you. So, while an effective induction experience is critical in helping new employees to settle in quickly and comfortably to their new roles, bear in mind that it is also one of the first impressions they will get of ITS, so an excellent opportunity for us to reinforce that they made the right decision in choosing to come and work here.

**Hints and tips for planning an effective induction**

**Good practice…**

* Start planning the induction well in advance as it will necessarily need to involve the time and availability of a variety of other people
* Ensure people are looked after properly and not left to work things out on their own
* Feature a large element of contact with other staff – the sooner contacts and relationships can be built the better
* Don’t forget to copy relevant parts of the plan to other staff as appropriate so everyone knows what’s happening
* Involve your existing staff in both planning and implementing induction – you do not need to do it all on your own
* Be conscious of how much information you are asking someone to digest in a single day
* A new employee does not necessarily know what they need to know – your guidance is critical
* Ensure your plan makes it clear how you and others can help the new employee become part of the team
* Much of the plan is self learning. Encourage the new employee to ask questions saving them for you for when you meet or to ask of their buddy
* Check in regularly with your new employee; ask how they are getting on and if you need to be doing anything for them;
* Sign off each activity - both manager and employee are to sign off each activity with date of completion, confirming clarity of understanding
* Anything else you can think of that will help make those first few weeks easier will greatly help your new colleagues settle in and become a productive member of your team as quickly as possible

**Try to avoid…**

* Do not assume a level of knowledge about Higher Education or Queen Mary – not even for staff transferred from other Institutes, Schools and Departments
* Consider the timing of meetings from the point of view of your existing colleagues and the pressures they are experiencing – first thing Monday morning may mean they are not as relaxed and welcoming as they could be
* Providing too much too soon – they must not be overwhelmed by a mass of information on the first day – keep it simple and relevant

**Breaking down the elements of induction**

At a high level, induction needs to cover four main areas:

1. things that need to be done before the employee joins
2. things about Queen Mary as a whole
3. things that are specific to ITS
4. things that relate to the role

and will necessarily need to cover some pretty dry subjects (and also some legal requirements). So think creatively about what you can do to make the experience as interesting and varied as possible such as a mixture of:

* Attending meetings
* Internet and e-learning
* Customer and supplier visits
* Reading
* Shadowing
* On the job coaching
* Mentoring
* Delegated tasks and projects

Ensure the induction plan is interspersed with ‘real’ work – giving them tasks to do will be mutually beneficial and enable them to become more effective sooner – give some thought to how realistic those tasks are though (although this is always difficult when there is a critical need for a new employee to ‘hit the ground running’).

The following pages provide checklists for the four areas highlighted above. They are purely to provide a framework for you to adapt to a bespoke induction plan– feel free to tailor, omitting items or adding other things as appropriate.

**Some questions to ask yourself to help you plan**

* What are the most important aspects about the role that your new colleague needs to know in order to be effective?
* How much do they understand about Queen Mary and ITS?
* Who would it be most useful for them to meet in their first four weeks?
* Is there anything you would like them to ask in their meetings? For example, induction meetings are a great opportunity for getting feedback from our customers – perhaps they could ask for ideas on what we could do differently.

**Getting the programme together**

On the basis of the above, slot the required activities from the checklist in this toolkit into a schedule (there is an example schedule in the toolkit, or you may just prefer to adapt the checklist – whatever works for you is fine as long as everyone is clear as to what’s happening when). Depending on the needs of the situation, the induction plan may need to extend over a number of weeks, progressively reducing the pre-arranged induction content, as the person settles into their job and becomes more self-sufficient.

The Queen Mary specific information can be tailored according to the timing of the staff induction events run by The Learning Institute in order to avoid duplication of information.

The schedule should also be copied to the other people involved in induction of the new member of staff.

Seeing a professionally produced induction plan can be very reassuring for a new employee, and helps make a positive impression about ITS as a place to work. Adding a notes and actions section (as shown) helps them to keep organised during those first few weeks until they get themselves into a routine.

**ITS Buddy**

As part of the ITS induction process, arrangements are to be made for the mentoring of new members of staff.

**What is a Buddy?**

A buddy will be a team member who has agreed to be a point of contact for a new member of staff to make them feel welcome and allay any feelings of isolation – the intention is to provide informal guidance and encouragement during their first few weeks of employment.

A buddy might typically take on the following tasks to help the new member of staff settle in:

* Be available to answer immediate routine questions of a general nature
* Provide information on how the working area operates, along with its policies and procedures, and where to go for other sources of information
* Show the new member of staff around the building, introducing them to other members of staff they may see within their working environment (but may not otherwise come into contact with within their role)
* Point out catering or other facilities that may be of interested ie, gym, library, shops, bar…
* Accompany them to lunch on their first day
* Check up on them regularly to ensure they’re OK

**A buddy is not…**

* Someone who involves themselves in issues relating to the appointment of the member of staff, or any other formal arrangements such as objectives, expectations, personal development plans or training needs – this is the responsibility of the Line Manager

**Who should be a buddy?**

A QMUL employee (other than the new member of staff’s line manager) who is familiar with the role and the department.

**When should a buddy be assigned?**

The Manager should line up an appropriate buddy as soon as they have a start date for the new joiner – in this way there is more chance to outline what will be required of this particular buddy relationship in advance and to clear some time in diaries.

If necessary the buddy’s line manager should be informed to ensure that they are happy for the prospective buddy to devote time to the role.

**Checklist**

| **Completed (by end of)** | **Topic** | **Why/Comments/Where to find it** | **Who to lead** | **Status/notes** | **Sign-off & Date** |
| --- | --- | --- | --- | --- | --- |
| Before joining | Recruitment | Ensure the recruitment activities are completed using : <http://www.hr.qmul.ac.uk/procedures/recruit/index.html> | Manager |  |  |
| Before joining | Joining instructions | Confirm start date, time, place and the name of the individual to report to on the first day (include a map of the site & contact info) | Manager/  HR |  |  |
| Before joining | Diary | Block out some time in your diary so you know you will be able to give some time to your new staff member | Manager |  |  |
| Before joining | Buddy | Approach preferred buddy and outline what is required from the relationship | Manager |  |  |
| Before joining | Secure Desk | Locate and secure desk, chair and pedestal for. Check with Estates, if unavailable contact Business Support Services | Manager |  |  |
| Before joining (at least 2 weeks’ notice) | Raise tickets for IT Equipment | To ensure the following is ordered and up and running from day 1: computer, telephone, mobile, desktop system software, email, passwords. Using the [New Starter Process](http://www.its.qmul.ac.uk/support/self-help/it_user_account/170320.html) | Manager |  |  |
| Before joining (1-2 days) | Notify IT CIO PA & Bus Supp Admin | Inform them of the start date, name role and contact details of the person who will collect the new starter when they arrive. Obtain the Access form from CIO PA or Bus Supp and send it back once completed. | Manager |  |  |
| Before joining | Develop an induction plan for first 6 weeks | Tailored to enable them to get up to speed (who are the relevant people to meet and why?). | Manager |  |  |
| Before Joining | Check IT Equipment | Check that the IT equipment has arrived and is operational, ensure the new starter knows who to contact on arrival | Manager |  |  |
|  |  |  |  |  |  |
| Day 1 | Collect new starter | Collect the new starter from the Reception | Manager |  |  |
| Day 1 | Welcome | Talk through induction plan (referring to web pages as necessary) | Manager/  Buddy |  |  |
| Day 1 | Set up IT | Set up the new starters email account, guide them through and ensure they have the correct software and the appropriate access privileges | Manager/ Campus Support |  |  |
| Day 1 | IT Strategy, culture and values | Outline of background and how this role fits in (reinforce what was covered in interview), vision statement, customer experience promise  QM & IT Services Strategy: connect <http://connect.qmul.ac.uk/>  <http://www.its.qmul.ac.uk/about/strategy/index.html> | Manager | Day 1 |  |
| Day 1 | Health & safety Induction | Meet with Odetta who will give an H&S induction. | H&S Coordinator |  |  |
| Day 1 | Security | Visit Security (Queens building, ground floor security hub) with new starter to have photograph taken and/or collect their ID card | Manager |  |  |
| Day 1 | Email notification to introduce new staff member | Ensure Cathy Valder Hogg in IT business Support has been given all the details for the New starter e.g. role, team, campus, building, room, telephone number, email address, name of line manager, contract type, so that the staff **directory**; and the appropriate mailing lists can be updated. | Manager /Odetta/  Cathy |  |  |
| Day 1 | Desk and Working space | Hot Desking policy and how to [book desks](https://spaceconnect.qmul.ac.uk) using the Dept.W Hub and the allocation of lockers | Manager |  |  |
| Day 1 | Tour | Tour – places to eat, toilets, bar, ITS – introduce to different teams; HR, library, gym, showers. | Manager/ Buddy |  |  |
| Day 1 | Learning, development and performance | Discuss and make new starter aware of the processes and policies for:   * Objective setting * Monthly one to one meetings * Probation plan and process * Personal development plan * Training and development * Appraisal * LinkedIn Learning | Manager |  |  |
|  |  |  |  |  |  |
| Day 2 | Human Resources | Ensure that the New starter books a meeting with HR for the validation and confirmation. | Manager/  Buddy |  |  |
|  |  |  |  |  |  |
| Week 1 | Book induction events | Ensure the New starter registers on CPD Portal : <http://www.profdev.qmul.ac.uk/what-we-offer-/induction/>  and books themselves onto the next QMUL induction event | Manager |  |  |
| Week 1 | Mandatory Training | Ensure the New starter is aware of the mandatory training as per the: <http://www.profdev.qmul.ac.uk/what-we-offer-/mandatory-training/>    And completes these as part of the [one-to-one objectives](https://www.its.qmul.ac.uk/media/its/documents/services/qmulonly/forms-and-templates/Monthly-review-sheet---June-2019.doc) | Manager |  |  |
| Week 1 | Intranet | Brief Highlight of the intranet site for information such as:   * Latest news * How to…: * Campus maps * Telephone directory * Department directory (with further links to separate school and departments’ sites)   <http://connect.qmul.ac.uk/> | Manager/  Buddy |  |  |
| Week 1 | Human Resources | Brief Highlight of how to find the HR website for information such as:   * Leave and work/life balance * Health and welfare * Trade Unions   <http://hr.qmul.ac.uk/workqm/> | Manager/  Buddy |  |  |
| Week 1 | SharePoint &  OneDrive | Explain the use of the SharePoint and OneDrive, how to access both, [training guides available](https://www.its.qmul.ac.uk/support/self-help/user-guides-for-mixed-mode-education/) | Manager/  Buddy |  |  |
| Week 1 | Email Guidelines | Ensure the New starter is aware of the ITS email signature format | Manager/  Buddy |  |  |
| Week 1 | Organisational Chart | Talk through the chart, outlining roles and activities within each team. Agree who the new member of staff needs to meet and add to the plan ie FRMs; Project staff; AD etc | Manager |  |  |
| Week 1 | Teams | Explain the use of Teams and Teams Site, [training guides are available](https://www.its.qmul.ac.uk/support/self-help/user-guides-for-mixed-mode-education/) | Manager |  |  |
|  |  |  |  |  |  |
| Week 2 | College Governance and management | Provides some basic information about the structure of our senior management team and how QM works – also includes material such as: the Strategic plan; a list of current heads of schools and latest news included on the Principal’s web page  <http://connect.qmul.ac.uk/governance/index.html>  Bear in mind that there are separate governance arrangements for Professional Services and IT Services <http://www.its.qmul.ac.uk/governance/index.html> | Manager/  Buddy |  |  |
| Week 2 | Raising tickets and using the Service management tool | Raise Tickets and location of service catalogue. [Ticket management guide](https://www.its.qmul.ac.uk/support/self-help/raising-tickets/) | Manager/ Buddy |  |  |
|  |  |  |  |  |  |
| Week 3 | ITIL and or Project management processes | Direct the new starter to the ITIL processes & Project pages <http://www.its.qmul.ac.uk/governance/servicemanagement/index.html>  Project Management – <http://www.its.qmul.ac.uk/projectsandchange/index.html> | Manager/  Buddy |  |  |
|  |  |  |  |  |  |
| By Week 4 | Policies  Processes  Forms & Templates | Ensure the new starter Familiarises themselves with IT Process & Policies <http://www.its.qmul.ac.uk/governance/policies/index.html> | Manager |  |  |
| Week 5 | IT Service Catalogue | Ensure the new starter Familiarises themselves with the IT Service Catalogue  <http://www.its.qmul.ac.uk/services/index.html> | Manager |  |  |

**Example Schedule**

| **Week One** | **What/who?** | **Comments/where to find it** | **Where?** |
| --- | --- | --- | --- |
| **Day 1** |  |  |  |
| 0800-0900 |  |  |  |
| 0900-1000 |  |  |  |
| 1000-1100 |  |  |  |
| 1100-1200 |  |  |  |
| 1200-1300 |  |  |  |
| 1300-1400 |  |  |  |
| 1400-1500 |  |  |  |
| 1500-1600 |  |  |  |
| 1600-1700 |  |  |  |
| 1700-1800 |  |  |  |
| **Notes**:(Follow-up, query, comment, action) | | | |
| **Day 2** |  |  |  |
| 0800-0900 |  |  |  |
| 0900-1000 |  |  |  |
| 1000-1100 |  |  |  |
| 1100-1200 |  |  |  |
| 1200-1300 |  |  |  |
| 1300-1400 |  |  |  |
| 1400-1500 |  |  |  |
| 1500-1600 |  |  |  |
| 1600-1700 |  |  |  |
| 1700-1800 |  |  |  |
| **Notes**:(Follow-up, query, comment, action) | | | |
| **Day 3** |  |  |  |
| 0800-0900 |  |  |  |
| 0900-1000 |  |  |  |
| 1000-1100 |  |  |  |
| 1100-1200 |  |  |  |
| 1200-1300 |  |  |  |
| 1300-1400 |  |  |  |
| 1400-1500 |  |  |  |
| 1500-1600 |  |  |  |
| 1600-1700 |  |  |  |
| 1700-1800 |  |  |  |
| **Notes:** | | | |
| **Day 4** |  |  |  |
| 0800-0900 |  |  |  |
| 0900-1000 |  |  |  |
| 1000-1100 |  |  |  |
| 1100-1200 |  |  |  |
| 1200-1300 |  |  |  |
| 1300-1400 |  |  |  |
| 1400-1500 |  |  |  |
| 1500-1600 |  |  |  |
| 1600-1700 |  |  |  |
| 1700-1800 |  |  |  |
| **Notes:** | | | |
| **Day 5** |  |  |  |
| 0800-0900 |  |  |  |
| 0900-1000 |  |  |  |
| 1000-1100 |  |  |  |
| 1100-1200 |  |  |  |
| 1200-1300 |  |  |  |
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| 1400-1500 |  |  |  |
| 1500-1600 |  |  |  |
| 1600-1700 |  |  |  |
| 1700-1800 |  |  |  |
| **Notes:** | | | |