OXFORD Global Finance & Strategy

NEW HIRE PLAYBOOK

Purpose

This Hiring Playbook has been created to support the continuous enhancement of onboarding activities within the Global Finance & Strategy (GF&S) team

It is intended to be used by GF&S people leaders that are onboarding new team members

The Playbook has been created with input from our stakeholders and we value your continuous feedback; please contact Tahsin Farooq if you see opportunities for improvement

It contains a series of recommendations (not requirements) and ideas that are practical, value-add, and intuitive

Ultimately, we want to make your lives easier by providing a streamlined roadmap for an exceptional onboarding experience

To meet our objective, we have assembled tasks in the Playbook into the following sections:

Pre-Start Date	Start Date	Post-Start Date

NEW HIRE **CHECKLIST**

PRIOR TO START DATE:

- [ ] **Complete Workday On-Boarding Tasks**
  The New-Hire's direct Manager can find a list of on-boarding tasks in the Workday Inbox
- [ ] **Add New-Hire to as a member to Important Teams Channels**
  E.g. Global Finance and Strategy
- [ ] **Add New-Hire to Relevant SharePoint Sites**
  E.g. GF&S Portal
- [ ] **Add New-Hire to Existing Calendar Invites**
  E.g. Recurring team meetings
- [ ] **Send Welcome Email Prior to Start Date**
  This is an important opportunity to communicate key details with the new hire including:
  - Welcoming New-Hire to the team
  - Outlining Day 1 at Oxford
  - Confirming IT Equipment and Phone (if applicable)
- [ ] **Confirm New Hire is included in all relevant distribution lists**
  (Contact Team Administrative Assistant)
- [ ] **Ensure that New-Hire either has access to Condeco Desk Booking System or has an assigned desk** (Work with Team Administrative Assistant)
- [ ] **Request hardware and software that the new hire will require on day 1** (laptop, mouse, headset, cell phone, etc.) **through IT Support Central**
- [ ] **Set Up Security Card with Facilities Management**
  (Work with Team Administrative Assistant)
- [ ] **Order Mobile Phone if Applicable**
  (Work with Team Administrative Assistant)
- [ ] **Place Order for Specific Software if Required**

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START DATE:

☐ **Day 1 Task:**

- Meet with New Hire
- Provide an Office Tour
- Collect Security Pass on 9th Floor
- Introduce New-Hire to Team Members (In-Person and Via Email)
- Get lunch/coffee together!

☐ **Walkthrough the GF&S New Hire Welcome Package**

This downloadable document will help New-Hires get familiar with the company and what we do, as well as other important information and resources to start them on the right track. This package includes:

- A checklist to help New-Hire complete important steps in your onboarding process
- Key Policies and Resources
- Our Story: Get to know the OMERS Enterprise, our company and our function

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POST-START DATE:

☐ **Confirm Enrollment in GF&S New Hire Orientation Session and OMERS Enterprise Orientation** (New-Hires will be automatically enrolled)

☐ **Explain the Personal Trading Policy including the process to pre-clear trades and disclosure requirements**

☐ **Verify that all IT applications, shared drives, SharePoint sites are active; and show new hire useful folders/links**

☐ **Schedule a technology overview session with New Hire to review system specific resources applicable to their role**

☐ **Confirm New-Hires Attendance in Mandatory Compliance Training** (Access Persons Only)

☐ **Visit Oxford Finance Academy on Workday and Enroll in Courses of Interest**

☐ **Review the Code of Conduct and Ethics**

☐ **Review the Oxford Compliance and Ethics Portal**

☐ **Coordinate regular touch-points with New-Hire during their first few weeks**

☐ **Complete Impact Goals**

At the beginning of the year, all team members set up Impact Goals in Workday. Similarly, you should help your new hire establish goals and a development plan.