

TOTARA: ONBOARDING WITH SALISBURY GROUP

*This is a transcript of a video
on the Totara Academy*



INTRODUCTION

My name is Jill Scott. I am the People and Organisational Development Director for Salisbury Group. Salisbury Group is a facilities management company. So we deliver cleaning and security, front of houses, and engineering works into buildings. We also do what we call capital project works, which is installing enormous big bits of machinery into buildings or replacing them in there, so we, so we have geographical cover of the whole of the UK. Um, and yeah, so it's always fun and exciting and a big challenge dealing with a national company.

How many people do you onboard at your organisation in general?

So we currently have five hundred and thirty people in our business, but, we have onboarded using Totara about a hundred people because we started the programs in October last year. Prior to that, it was a very different way of working where we weren't using an LMS at all, to manage that.

How do you get new starters into your system?

We use HR import to do it, really for a couple of reasons: one being that our applicant tracking system spits out a CSV file and so also does our two HR systems. So it's much easier for us just to compile it into the one and then push it into the system. Also because manually uploads... we can have 10-15 starters in a week is just so time consuming. So HR Import is definitely the way to go for us.

What does the first interaction with the system look like to the user?

We have 11 onboarding pathways and the pathways are dependent on what kind of role that you have in the business, whether that is a security officer or somebody who's in a post room or depending on a member of management. We had a discussion internally about the kind of experience that we wanted for individuals. Now bearing in mind that people who are frontline operation people just want to get on and do the training or learning and then get off the system, what we didn't want to do is have a landing experience that then they were a bit kind of like well I've got to go and read all this other stuff before I get to my onboarding programs.

So we made the landing dashboard very very simple. So you land on it. It says, Hello, you're here. Welcome, welcome into Salisbury Group. Here are your modules, right, in your face but we took the decision that the experience for managers would be quite different. So the managers dashboard is more widgets on it. More things you can click into, it still has the programs sitting there right in the middle of the page tells you a bit more. And it's, I guess it's a bit more fluffy, than it is for the operational piece. So there's two different views depending on what your role is within the business.

My description of those two different dashboards, the one that we are kind of looking at the moment is our landing page for a security officer. So, what we want to do is just get them to the experience and get on with their training. So the, essentially they land on this page, and you know, here is your own boarding piece. You click onto them, they're linked into programs, and I'll take you into the programs. And our programs are, again, depending on what level you fall in the business, you'll



have a day one, which is always your company induction and your health and safety induction, and then week one will be other elements to do with your role.

And then some of the management guys will also have a monthly, or something to complete within four weeks. What we actually see here, just moving on slightly from the onboarding, because it's appearing, at the bottom of the page here, is we also have micro learning that we roll out to the guys and it comes every single month.

So at the moment this we have Steven, Steven in security, you're looking at, um, he is due his March er learning here and he would click on it, and do he would do his learning here and what happens every month is a new block appears for them to do training. So that's a clean experience that the frontline operations guys get.

So if I just try and share the other one. So this is the onboarding piece for some management levels or administration or, um, people who are working on sites who are maybe based at a desk rather than individuals doing more manual work. Um, and so they pop on and they get a link into their onboarding piece, which only appears until their onboarding is completed and then it disappears after that and they get a nice message to see 'welcome on' this message changes as they move through the programs. When the finished day one training a new graphic comes up and says 'week one training', and then go into month one again, if you roll down the page, we have programs setting in here. Click on the programs, do their program. Again, that's day one week one, and then month one training.

How did you build this page? Which Totara features are you using?

It's built in with audiences, um, it's built using a HTML block. And then I have audiences sitting behind it, which, um, are then give, then have the permission to view that block. Um, and as the come back out of that audience, that block disappears and a new book appears.

Do you add any social learning elements into your onboarding?

We kind of at the moment have a lot of people working on (Microsoft) Teams. Um, and that's absolutely fine. I think when you establish them, what we want to do is when people are coming new into the business in particular, if they're being transferred over as a large batch of people on from a new contract is to create that social aspect with all of them, be able to communicate with each other. So it's a safe zone to talk to the people who you've transferred over with. Rather than being in a bigger group, especially for the first couple of weeks, because it's a little bit daunting. You don't want to ask questions in case you seem daft in brand new company and anybody who denies that, is not telling the truth. Sometimes you do feel that you just don't want to ask those questions. So we're going to set up and have the social piece in there for those individuals. Um, but I think for the larger part of the company, they are comfortable using (Microsoft) Teams. And to be honest, as long as they're talking to each other, I don't mind whether it is through Totara or whether it's on (Microsoft) teams.



How do you report on your employees onboarding experience?

So from a reporting piece, um, one of the difficulties that we had is, um, using the direct and indirect relationships to show, um, reports because our business doesn't quite work that way, so there can be business unit leads with an incredible amount of people sitting under them. And then the reports are not relevant and it's showing everything. Um, so what we did is we actually built a lot of audiences and then built dashboards for each one of those individuals. So you can see a contract, so everybody, within that contract and everybody within that skill set. So everybody is a cleaner or a front of house or a security. They have their own dashboards and on the dashboard, it shows you at the top the people who've onboarded and the status that they are in. And then underneath that, it gives you a written report so that they can say that this individual hasn't done it and they can go and chase that individual. Um, and then the bottom section of the reports is about the micro learning piece, which is really important to us because it a lot of health and safety sits behind that. So it's important that we are reporting who has, and has not done it for the individual.

Is there any advice you would give to someone who is starting to onboard new employees?

You know, for anybody who's thinking about using the system for onboarding, it seems rather daunting, especially if you don't have a traditional style of organisation a bit like ours. Um, and there is always ways to set up different audiences to make the system do whatever you want to do. Our way of doing it was to create codings for every role within our business, so that we could apply that within the system and then make the audiences work against these.

What I would say is if you have a big project to take on is actually just sit down with a huge bit of paper and work your way through it, because by doing that, it makes it much simpler then to go on and to create your programs and your audiences, and apply that within the system and get things to switch on and off because you're not working, trying to work it in the system. You've actually written it down. You understand what you want to see appear and what has to apply to different peoples. That was a way that we started, it was an enormous spreadsheet. It was arrows driven all over the place, but it was the only way that we felt comfortable. But the time we arrived at the system, we knew exactly what we wanted to program into it and how it was going to work.

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