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LET'S TALK WORKDAY

Let's Talk:
Employee Onboarding Experience

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QUICK TIPS

Zoom Webinars
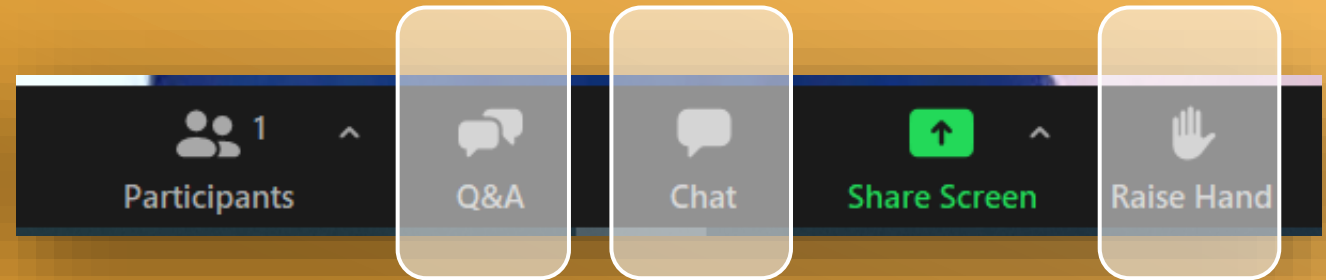
Ask Questions in Q&A Box
- Click the Q&A button to open the window
- Type your response in the text field
- Click Send

Chat
- Click the Chat button to open the chat panel
- Type your message in the Text box at the bottom of the panel
- Press Enter to send your message

Raise Your Hand
- Click the Raise Hand button at any time to indicate to the host know that you have a question or need assistance

WELCOME

Today's Presenter

Beth Taggart

Armanino

LET'S TALK WORKDAY

Today's Agenda

- New Onboarding Experience
- Demo
- Considerations / Use Cases
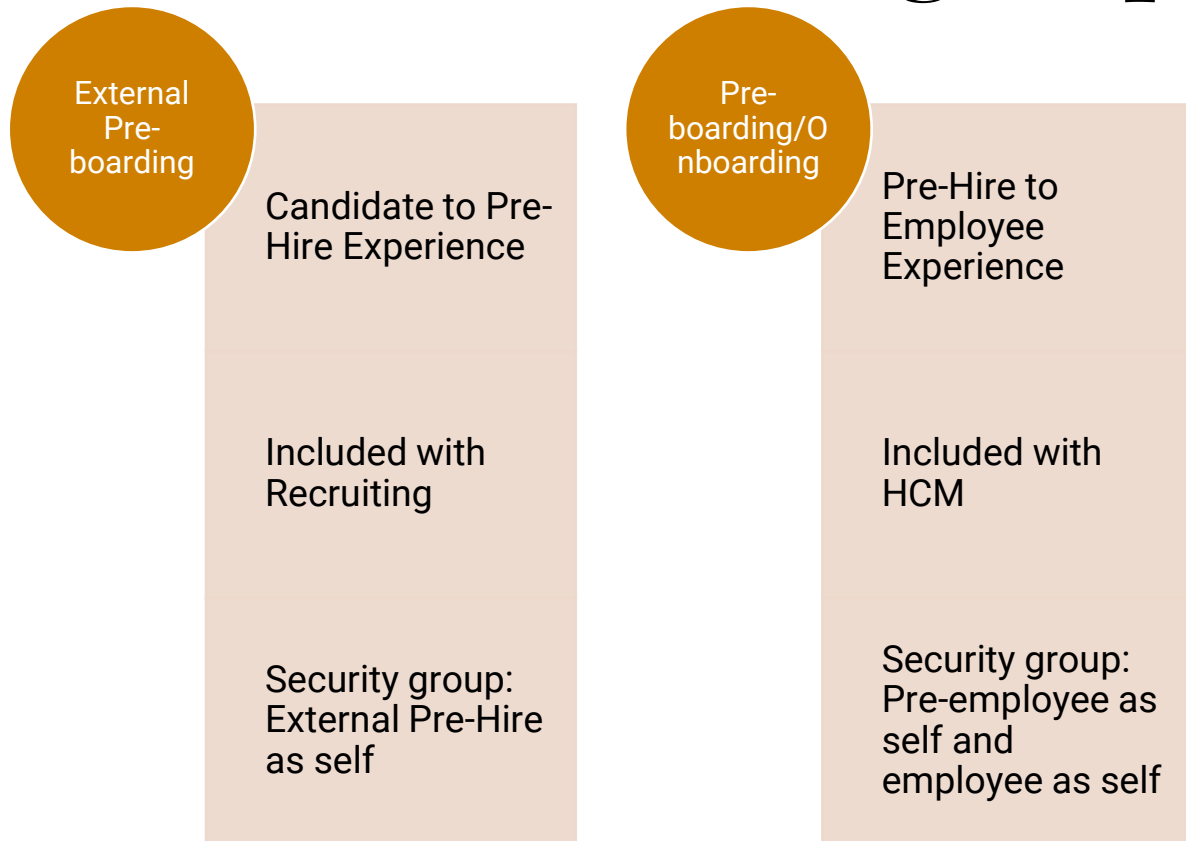- Open Q&A for all things HCM!

New Onboarding Experience

- https://community-content.workday.com/content/workday-community/en-us/reference/products/human-capital-management/core-human-capital-management/the-next-level/understanding-the-new-onboarding-plans-experience.html
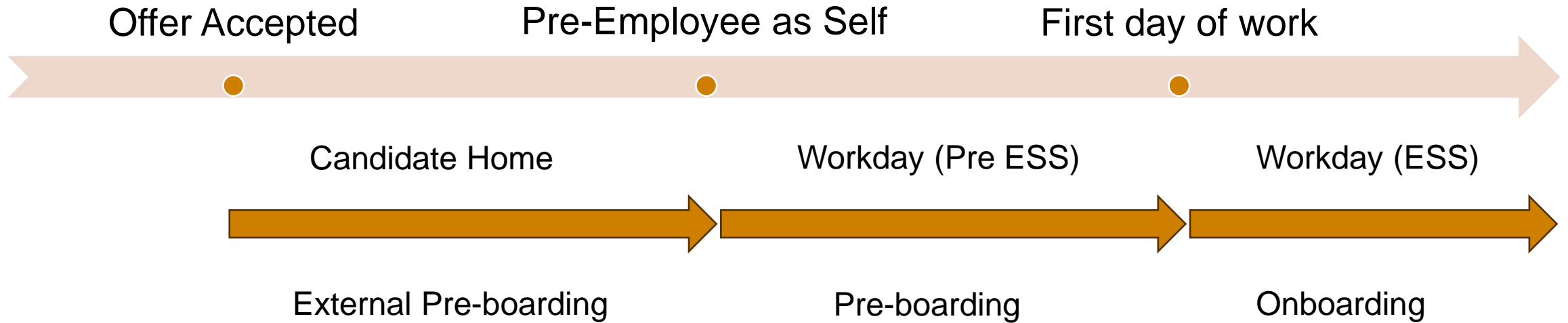
New Onboarding Experience

External Pre-boarding

Candidate to Pre-Hire Experience

Included with Recruiting

Security group: External Pre-Hire as self

Pre-boarding/Onboarding

Pre-Hire to Employee Experience

Included with HCM

Security group: Pre-employee as self and employee as self

- **External Pre-Boarding:**
  - Utilizes Candidate home credentials, Day 1 Overview, Videos and Announcements

- **Revamped Onboarding:**
  - Preboarding with WD acct, Onboarding plan with timeline

- **Onboarding Planner Hub**
  - Centralized hub for Plan Configuration

- **Workday Docs**
  - Generate Docs on Onboarding bp

High Level Onboarding Flow

Offer Accepted

Pre-Employee as Self

First day of work

Candidate Home

Workday (Pre ESS)

Workday (ESS)

External Pre-boarding

Pre-boarding

Onboarding

Demo!

Cara Dutton

Candidate who just accepted Offer

Rip Wheeler

New Hire – in 1st Stage of Onboarding

Missy Taggart

New Hire – in 3rd Stage of Onboarding

Logan McNeil

Onboarding Admin

Considerations / Use Cases

- Start Onboarding Process before the new hire logs into the system

- Increase engagement for hires that take place months before the first day of work

- Break out the Onboarding Process in stages – creating a more digestible process for new hires

- Consider what is the best use case for your own organization

- Weigh pros and cons of Journey vs. Onboarding Planner

Journeys Vs Onboarding Planner

Journey	Onboarding Planner
Takes place solely in Workday Tenant	Can take place prior to Workday Tenant Access
Available on Change Job	Not configurable on Change Job current state
Enhancement to onboarding process	Delivers key onboarding requirements in user friendly fashion
Easy user interface	Administrative user interface

Configuration 'Gotchas'

- The domain Self Service: Onboarding

  - Make sure they have Modify access in addition to just view or they won't be able to see all of the content within the Onboarding Plan

  - If you are wanting to setup the Recruiting portion for External Pre-boarding don't forget to add 'External Pre-Hire as self'

- External Pre-boarding

  - Within the Onboarding Plan Stages that you setup, the '# of Units' should be a negative # if you want the External Pre-hire to see the Onboarding Plan prior to their start date

- Creating Audiences – you maintain the Audience and THEN you have to additionally Plan Audience Selection which is what actually assigns the audience to the plan

- You can customize reports and add them via Suggested Links to the Onboarding Planner Hub

- Calc Fields for Content / Condition Rules etc need to be built off of the BO 'Onboarding Plan Assignment'

- Adding the 'Onboarding Plan Assignment' service step via the bp

  - BP Hire: parallel step to Onboarding tasks kick off

  - BP: Offer: Step directly after Offer Accepted by Candidate

New Onboarding Experience Packages

Armanino is here to support you along your Workday journey in the capacity you best see fit.

Advisory Support

Armanino will provide support leading up to, during, and after your New Onboarding Experience implementation.

Advisory Support includes:
- Weekly office hour sessions for your Core Workday support team to allow for questions and working sessions on changes required to launch the New Onboarding Experience successfully

- "Quick Question" support via email

- Testing support and issue resolution guidance

Hands-On Support

Package: **Essential**

- Includes oversight and mapping support for Onboarding Plans

- Requirements gathering, configuration, testing and deployment support

- Assumes creation of 2 Onboarding Plans and corresponding elements

- Assumes Hire business process support only

Package: **Advanced**

- Includes oversight and mapping support for Onboarding Plans

- Requirements gathering, configuration, testing and deployment support

- Assumes creation of 3 Onboarding Plans and corresponding elements

- Assumes Hire and offer business process support only

Package: **Ultimate**

- Includes oversight and mapping support for Onboarding Plans
- Requirements gathering, configuration, testing and deployment support
- Assumes creation of 5 Onboarding Plans and corresponding elements
- Assumes Hire, offer, Employment agreement and Contingent Worker processes in scope
- Assumes 1 custom report in scope

POSSIBLE (RE)DEFINED

Questions?

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