

Project Begin: 6/16/2015	Client: New FY 14/15 Academic Employees
Project End: 8/27/2015	Owner: Academic Onboarding Kaizen Team

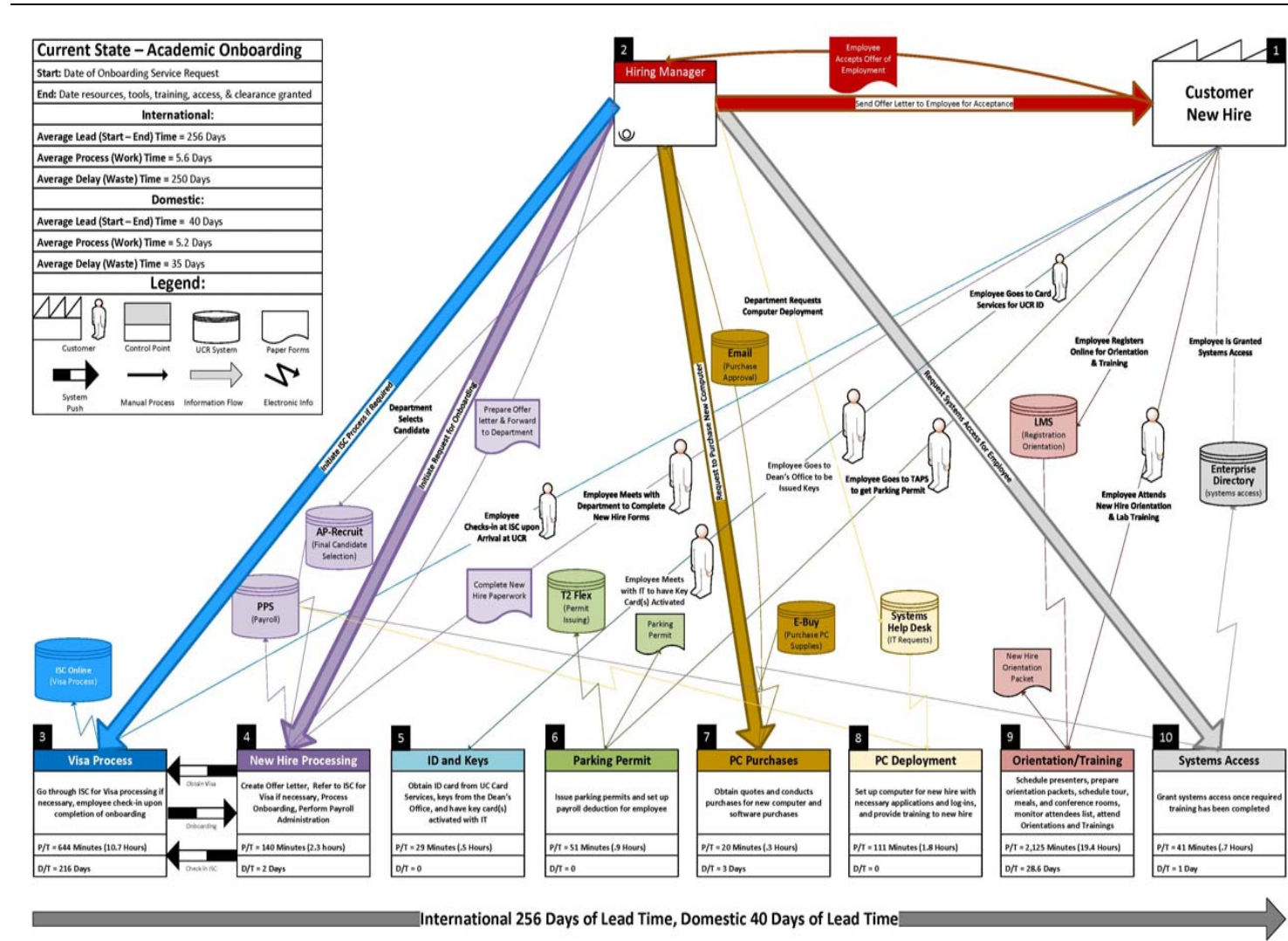
ONBOARDING: The administrative components of the onboarding process is considered complete when a new employee has the required resources, tools, training, systems access, and clearances to effectively perform their job duties.

PROBLEM: Clients report that the onboarding process is time consuming, labor intensive, and inefficient, which results in significant time delays to complete their onboarding process.

BACKGROUND AND PROCESS OVERVIEW

The process of onboarding new academic employees is decentralized across the campus. Each organizational unit provides oversight for the administrative process, in accordance with campus policies. Onboarding requests of new academic hires include the completion of payroll forms, assisting international scholars to obtain the required visa for their specific appointment, requisition and deployment of new computers and equipment, issuance of parking permits, job-related training, and granting systems access. Service providers use a combination of manual processes, systems, and tools to complete components of the service request and manage communication. Onboarding was identified by the campus as an area for improvement during the first Organizational Excellence series, which aim to directly support [UCR's 2020 Strategic Plan](#), organizational excellence goals, and cultural transformation initiatives. Specifically, process improvements will enable the University to quickly and efficiently hire and onboard academic personnel and increase administrative efficiency and effectiveness.

CURRENT STATE: ACADEMIC ONBOARDING PROCESS PERFORMANCE VALUE STREAM MAP (VSM)



ROOT-CAUSE ANALYSIS

Problem	Why is this problem occurring?
Overproduction of materials and Over-processing of information.	<ul style="list-style-type: none"> 120 steps and decision points in the process, causing bottlenecks and delays. Approximately 50+ manual forms to complete with duplicative information. Forms are difficult to locate and often require rework by various departments.
Waiting: Onboarding a single employee takes up to 291 days for international hires and 40 days for domestic hires.	<ul style="list-style-type: none"> International scholars can expect up to a 4-month delay in obtaining visa clearance from homeland security. International scholars can experience a total delay time of 250 days. Seasonality leads to bottlenecks as service providers experience an influx of Academic appointments at the beginning of each quarter.
Waiting: Limited availability for new hire orientation and training.	<ul style="list-style-type: none"> Waitlists up to 2 months for new hire orientation – class size limited to 18 people. Limited resources to complete new hire orientation. Safety training must be arranged prior to the start of lab work.
Transportation: New hires must visit multiple locations to complete onboarding process.	<ul style="list-style-type: none"> Service providers are dispersed across the campus and not organized. 8 non-integrated systems are required to complete service requests. No overall process owner to manage customer expectations or requirements.
Underutilization of Technology: Information between service providers is not integrated.	<ul style="list-style-type: none"> Information manually managed by email and phone in 8 non-integrated systems. No common or standard process to manage information flow. No universal ownership by all service providers for the end-to-end process. No visibility by service providers to see services in other provider's queue to plan and anticipate resource requirements.

PROBLEM ELIMINATION COUNTERMEASURES: VOICE OF THE CUSTOMER – FY 14/15 NEW HIRES

What do our clients value?	What are our customer's specific requirements?
Seamless onboarding experience.	Centralize onboarding elements or bring onboarding directly to the customer to reduce travel time (waste). Eliminate unnecessary forms.
Online access to employment forms.	An online database for employment forms that is accessible to supervisors and new hires.
Automated form fulfillment center so new hire is not required to be physically present.	An online system for completing required employment forms.
Automated parking options.	TAPS requires in-person permit application and payment authorization. An automated process for permit delivery and payment.
Complete new hire orientation 1st month of hire.	Eliminate 2-month waitlists for orientation due to seating limitations. Capacity must be augmented; orientation should be held more frequently and should be mandatory.
Redefine 'onboarding'.	Onboarding should include information about UCR Policy, department vision, and job expectations in order to reduce learning curve. The transition should be smooth.
Eliminate delay time in TA appointment onboarding.	Prepare for known peaks seasons by effectively using resources and time during off seasons.
Standardize onboarding process to ensure consistency in information and experience.	Elements of onboarding are not standardized, leading to inconsistent delivery, clarity, and type of information provided to the employee. Create standard checklists of activities and steps to complete the onboarding process.

GOALS FOR PROCESS IMPROVEMENT

Improve the client's onboarding experience by offering timely, integrated, and efficient value added services. Improve communication and collaboration between service providers by ensuring visibility into each other's processes. Minimize waste producing activities to reduce the 291-day lead time (international hires) and 40-day lead time (domestic hires), free up the demand on resources, and redirect them to value creating activities.

IMPLEMENTATION PROPOSAL FOR PROCESS IMPROVEMENT

- Organize a 5-day 'Kaizen-Improvement' event to include a broader cross-campus group of stakeholders, clients, and service providers; and immediately plan for the future state of the onboarding process.
- Conduct a resource analysis to understand the demand on resources imposed by the current state process and understand how these resources may be freed up and redirected to value creating activities.
- Develop an implementation and communication plan for the future onboarding process
- Evaluate connections to other services such as recruitment and off-boarding.