Employee Orientation Guide

(A Leader's Guide)

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What is Onboarding?

Onboarding is the process of welcoming new employees to the organization, helping them understand job expectations and how their position aligns with the organization's mission, and quickly equipping them with the knowledge, skills, and key relationships to be successful in their new job. The onboarding process begins during recruitment and continues through the first year of employment. Successful onboarding requires a partnership between the hiring manager, and human resources. **This guide will focus specifically on the leader's role during the first 90 days of employment.**

Why is Onboarding Important?

- It helps with building a strong sense of belonging and engagement from the beginning of employment;
- Helps new staff members fully contribute more quickly;
- Improves overall job satisfaction;
- Builds a more cohesive team and raises team productivity;
- Helps increase new employee retention; and
- Reduces high turnover costs.

What is the Leader's Role in Onboarding?

Best practices and survey data demonstrate leaders play a critical role in a new employee's experience and success within the organization. *As a Leader, your role is to facilitate the process from start to finish – noting that Human Resources is available to provide support.* Included in this document you will find tools and best practices to help you:

- Prepare and plan for the first 90 days of your new employee's experience.
- Ensure the newly hired employee is familiar with the policies, processes, culture, key relationships, expectations, and day-to-day responsibilities of the organization.
- Ensure new employees feel welcomed, engaged and included.

Onboarding Your New Employee At-A-Glance

When	Objective	Summary of Activities
Pre-Hire	Create a strong first impression. Ensure the employee has all the tools to perform their job and all administrative requirements are completed.	- Set up the workspace - Communicate about new hire - Plan welcome events - Develop Onboarding Plan - Schedule training
First Day	Welcome the employee and complete administrative tasks.	- Introduce to colleagues - Meet to review expectations and Onboarding Plan - Provide tour of workspace/unit - Share mission and purpose of the organization - Plan for new hire lunch/welcome activity
First Few Weeks	Assist employee with learning about their job, their unit and the organization.	- Share policies, practices and procedures - Share additional guidelines and practices of the organization - Expand network or resources - Provide training and related resources
First 90 days	Establish regular communication channels and communicate expectations and requirements. Help the employee feel part of the organization	- Schedule regular one on one meetings with the new hire (weekly to start) - Provide regular constructive feedback on performance and progress - Continue introductions of partners and stakeholders

Tips for Successful Onboarding

The recruitment process continues well into the employee's first few months on the job. In fact, studies have shown that new employees (*87% of them according to a study by the Aberdeen Group)* are not fully committed to the new job for the first six months. So while your new hire is still evaluating if they made the right decision to join the organization, be sure to follow these tips for success.

1. **Be There:** Schedule your new employee to start work on a day/week you know you will be available (i.e., not on vacation, traveling on business, offsite/remote scheduled meetings/conference).

2. **Arrival:** Make sure there is someone assigned to meet the new employee as they arrive on their first day or schedule an online meeting for the first day.

3. **Work Area:** Have an assigned work area ready for them and a place for them to put their personal belongings *(for in-person work).*

4. **Ready for Work:** Make sure you have all supplies/tools/equipment (i.e., computer, phone,etc.) ready for the employee to begin work immediately.

5. **Welcome Activity:** Make plans for a welcome activity for the employee on their first day(s).

6. **Notice Message:** Sending a notice out before the new employee arrives to inform co- workers and other key people of their hire and their job responsibilities. *(See the Appendix A for sample letter to send out.)*

7. **Introductions:** Show the new employee their workspace and introduce them to co-workers. Also helps to assign them a mentor.

8. **Time for Training:** If you plan to have a co-worker train the new employee, ensure the person has the focused time to spend properly training the new employee.

9. **Meaningful Work:** Provide the new employee with real and meaningful work from their first day on. Being able to have even a small accomplishment in the first week of work is very motivating for a new hire.

New Employee Success Plan

Documenting and sharing pre-established goals and success points for the first 90 days will create a foundation for success for your new hire.

Name_____ Today's Date _____

Position _____ Start Date _____

TOP 4 POSITION-SPECIFIC KNOWLEDGE/SKILLS:

1._____

2._____

3._____

4._____

Use additional pages if there are more than 4 of these to focus on in the first 90 days.

FIRST 30 DAYS

Success looks like... (What will the new employee have learned or done?)

Others or I will help our new employee achieve success by...

FIRST 60 DAYS

Success looks like... (What will the new employee have learned or done?)

Others or I will help our new employee achieve success by...

FIRST 90 DAYS

Success looks like... (What will the new employee have learned or done?)

Others or I will help our new employee achieve success by...

ADDITIONAL GOALS AND TRAINING

Other goals for the new employee include...

Others or I will help our new employee achieve success with these goals by...

Specific training needs or action plans to achieve the goals are...

Pre-hire Checklist

The checklist below will guide you through key tasks to complete **prior to the new hire's first day**. This is a valuable list to review in partnership with others such as your HR representative and department manager.

PREPARING FOR THE NEW HIRE:

Administrative:

- [ ] ***Create a transition plan*** for the new employee and those currently handling the tasks of the position *(if applicable).* Define a timeline for how each task will transition to the new employee, who will be responsible for training, and who will communicate the plan to departments and colleagues across the organization. A clear plan will set the expectations for the employee and assist them in being successful.

- [ ] ***Add new employee to Email Calendars*** in the organization work group as needed

- [ ] ***Update internal communications***, distribution lists, and email lists with the employee's contact info

Technical Requirements:

- [ ] ***Telephone/line*** request and long distance capability if required

- [ ] ***Personal computer*** set-up. Best to order computer as soon as position is posted.

- [ ] ***Establish computer system and security accounts*** needed to perform the job

Workspace:

- [ ] ***Order keys and security codes*** if relevant

- [ ] ***Order nameplate, nametag, and/or business cards*** if appropriate

- [ ] ***Prepare workspace***: set-up, neat, clean, and organized

Supplies:

- [ ] if relevant

- [ ] ***Accommodations:*** If the employee has requested workplace accommodations, arrange for them in advance, if possible

Work Assignments:

☐ **_Plan initial assignments:_** As the leader, be

sure the new hire has the tools and information to complete their first assignment successfully; this will set the tone for productive supervisory-employee interactions to come.

Staffing:

☐ **_Identify a mentor/_**someone in the

organization to serve as an orientation guide to answers questions and inform person of the responsibility (work with HR)

Welcome Plan:

☐ **_Plan a welcoming activity_** appropriate to your

work group (i.e. coffee break meet and greet)

☐ **_Plan a follow up activity (30 days),_**

including who will participate

☐ **_Plan your schedule_** so on the new hire's

first day you can spend time with them at the beginning of the day and the end of the day

Communications:

☐ **_Call the employee_** a day or two before arrival

to answer immediate questions and invite them to call with new questions

☐ **_Send out an announcement_** to welcome new hire into the organization, briefly describe their role in the organization _(see appendix for sample)_

Other:

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

First Day Checklist

The following checklist contains key tasks to help with your employee's first day acclimation. You may want to ask others on your team to help with some of these responsibilities.

FIRST DAY OF WORK:

Introductions

☐ **Greet the employee**, show them their workspace/office, and where to put personal belongings (if applicable).

☐ **Introduce them to others** in the department/work area including their assigned mentor.

☐ **Lunch:** If planned, have lunch with scheduled participants; if not, make sure new employee knows where they can go for lunch and what others generally do for lunch.

Workplace Orientation

☐ **Confirm workspace is ready:** Ensure they have all the equipment and tools needed to do their job.

☐ **Give a tour of the office and building (if applicable),** point out key locations (copier, mailroom, fax machine, office supplies, restrooms, break areas, emergency exits, fire extinguishers, vending machines, Human Resources office, etc.).

☐ **Provide them with facility information** such as keys and security codes.

☐ **Provide an orientation to computer systems;** include log-on, email, security, and calendaring.

☐ **Review phones & copiers:** phone system and usage, fax, scanning, and copying procedures.

☐ **Review office procedures** and guidelines (time away from work reporting requirements, personal phone calls, lunch breaks, office coverage, etc.).

Administrative/Payroll Onboarding

☐ **Complete additional forms** specific to the position, (i.e. confidentiality agreements, payroll forms.)

☐ **Required training:** Schedule any Right-to-Know or other required training as needed.

Other:

☐ _____

☐ _____

☐ _____

Once these items are completed, move on to the next set of recommended activities for the first weeks and first 90 days.

First Few Weeks Checklist

WORKPLACE-RELATED INFORMATION:

Functions

☐ **Supplies:** Provide information and instructions on office supplies and equipment.

☐ **Safety:** Provide safety and emergency information and share how to report hazards where applicable.

☐ **Finances:** Provide budget, finance, purchasing procedures if needed, including policies and rules for use and information on training.

☐ **Meetings & Events:** Provide information about meetings and other events on the employee's calendar (purpose, attendees, what to expect, the employee's role); debrief with employee following these experiences to answer questions and provide additional information.

Culture

☐ **Share other guidelines and traditions** with employee

☐ **Culture:** Discuss your leadership style and the organization's culture.

☐ **Consider developing a glossary** of terms and acronyms as a reference guide.

Role

☐ **Set up for success:** Assign the employee something they can accomplish relatively quickly and easily to help build an initial sense of contribution and success.

☐ **Set priorities**. Discuss what is important to overall objectives. This will help the new employee prioritize tasks since they are new to the organization.

☐ **Introduce the employee to partners** external to the organization who will work with them on projects or tasks.

Policies

☐ **Review all policies**

☐ **Explain confidentiality** in the workplace, what can and can't be shared, and how confidential documents are stored.

☐ **HR Policies:** Provide information and time for the new employee to review HR policies, Organization philosophy, Code of Conduct, Computer Rights and Responsibilities, Diversity and Inclusion, Respect policy.

☐ **Organization Policies:** Review organization policies such as Conflict of Interest, Standards of Ethical Conduct, Data Stewardship and Custodianship, Policy, Anti-Discrimination polices.

CAREER-RELATED INFORMATION:

Career Development

☐ **Expectations:** Determine mutual performance standards by reviewing position responsibilities, setting performance expectations, success measures and KPIS, and clarify the new employee understands expectations.

☐ **Training:** Identify training resources and opportunities for the employee and set a realistic plan of action.

☐ **Professional Development:** Introduce the employee to resources such as the professional development workshops and educational benefits.

Connect With Big Picture

☐ **Organization mission:** Review your organizational chart and explain how the individual's work connects to the organization's mission. .

Other:

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

First 90 Days Checklist

☐ ***Provide regular and constructive feedback*** during the first 90 days and beyond.

☐ ***Training:*** Review and direct the employee to training opportunities.

☐ ***Work Schedule:*** If applicable to the position and organization's needs, provide guidance on identifying appropriate flexible work options to assist the employee's effectiveness and efficiency.

Suggested Questions to Ask During New Hire Check-in Meetings

- How is your job going?
- Is the role as you expected when hired?
- Are there any concerns?
- Has the training been helpful?
- What training would you add?
- Do you have all the work tools/resources you need?
- Do you feel you have been able to manage your work/life needs since starting this job?
- Was your Onboarding helpful? Is everything OK with your benefits and pay?
- Any questions/anything unclear?

Appendix

SAMPLE DEPARTMENT INTRODUCTION EMAIL

Hi Everyone -

I am very pleased to share with you that (name) has accepted the position of (title) in (department), filling the position previously held by (incumbent name). We are very excited that (first name)'s first day working with us will be on (date).

Provide brief background including where they are currently working, title, a bit of background on the type of work they are currently doing and information about educational background. Provide information on any unique knowledge, skills, or experience the person will be bringing to the team. (From their resume)

Please join me in welcoming (first name) to (department name) and the organization!

Thank you,

(Leader's Name)