

GETTING STARTED

Chapter 5 ONBOARDING

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The actions one takes during their first three months in a new job will largely determine whether they succeed or fail.

*Michael Watkins
"The First 90 Days"*

5.1 Onboarding Overview

ABOUT THIS TOOL—A deliberately planned onboarding process sets a new employee up for success. An employee should know what is expected of them in their first sixty days. These expectations should be realistic and encourage growth in technical aspects of the position as well as relationship building. Strong onboarding will reinforce the employee’s decision to take the position and accelerate their ramping up to be a productive contributor.

APPLICATION—Use these tips and the Onboarding Plan (Tools 5.2, 5.3) to create a memorable onboarding experience for the new employee. Developing the plan with your team makes for a more complete onboarding experience and accelerates integration of the new employee with the team.



Source: Developed by the author

5.2 Sample Onboarding Plan

First Day	First Week	First Month	First 60 Days
<p><i>Start time, lunch plans, workplace tour, initial meetings. What can you do to make the first day memorable for the employee?</i></p> <p>EXAMPLE</p> <p>8:30 Greet employee in lobby</p> <p>8:45 Get settled in office</p> <p>9:15 Review onboarding plan</p> <p>9:45 Team meeting</p> <p>11:00 Benefit Enrollment</p> <p>12:00 Team outing & lunch</p> <p>2:00 Workplace tour</p> <p>3:00 Office time</p> <p>4:00 Debrief the day</p>	<p><i>Meetings, training, document review, and networking priorities for each day.</i></p> <p>EXAMPLE</p> <p>TUESDAY Attend division staff meeting</p> <p>WEDNESDAY Meet with colleagues in other units: Who? When? Why?</p> <p>FRIDAY Attend corporate onboarding presentation</p>	<p><i>Check-in meetings, other meetings, training, and networking priorities for the rest of the month.</i></p>	<p><i>Required training, workshops, professional or community events, ongoing networking.</i></p>
Manager's General Expectations	Initial Assignments	Success Criteria for the First 60 Days	
<p><i>Here is where you would insert your statement of management expectations created using Tool 2.3.</i></p> <p><i>It's important for employees to understand their new boss' values and mindset related to customer service, continuous improvement, learning, and representation of the organization.</i></p>	<p>EXAMPLE</p> <ol style="list-style-type: none"> 1. Complete onboarding 2. Establish positive working relationships 3. Make progress on.... 4. Master.... 5. Develop... 6. Research... 7. Review... 	<p>EXAMPLE</p> <p>I will know you are succeeding to the degree you accomplish the initial assignments, establish effective working relationships with the team and within the organization, and own the key accountabilities of your position.</p> <ul style="list-style-type: none"> • Accountability #1 • Accountability #2... 	

Source: Developed by the author

5.3 Blank Onboarding Worksheet

First Day	First Week	First Month	First 60 Days
Manager's General Expectations		Initial Assignments	Success Criteria for the First 60 Days

Source: Developed by the author