GETTING STARTED

Chapter 5
ONBOARDING

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.

Create the Plan	Clarify for the Employee	Discuss with the Employee
Be there on the employee's first day	The current business situation for the organization and your team	Goals for the first sixty days
Set up their office	Who they will be working with	Initial assignments
Make lunch arrangements	Expectations *Technical* *Relationships*	What success looks like
Do something to make their first day memorable	Your personal communication preferences	Your management values (see Tool 2.3)

Source: Developed by the author

5.2   Sample Onboarding Plan

First Day	First Week	First Month	First 60 Days
Start time, lunch plans, workplace tour, initial meetings. What can you do to make the first day memorable for the employee? *EXAMPLE* **8:30** Greet employee in lobby **8:45** Get settled in office **9:15** Review onboarding plan **9:45** Team meeting **11:00** Benefit Enrollment **12:00** Team outing & lunch **2:00** Workplace tour **3:00** Office time **4:00** Debrief the day	*Meetings, training, document review, and networking priorities for each day.* *EXAMPLE* TUESDAY Attend division staff meeting WEDNESDAY Meet with colleagues in other units: Who? When? Why? FRIDAY Attend corporate onboarding presentation	*Check-in meetings, other meetings, training, and networking priorities for the rest of the month.*	*Required training, workshops, professional or community events, ongoing networking.*

Manager's General Expectations	Initial Assignments	Success Criteria for the First 60 Days
Here is where you would insert your statement of management expectations created using Tool 2.3. *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.*	*EXAMPLE* 1. Complete onboarding 2. Establish positive working relationships 3. Make progress on…. 4. Master…. 5. Develop… 6. Research… 7. Review…	*EXAMPLE* 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. • 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

5.4 What to do on a new employee's first day

INTERPERSONAL PRIORITIES

1. **Give your new employee your undivided attention.** Prepare a checklist of subjects to review with your new employee, set aside the appropriate amount of time to do it, and let others know that you are not to be interrupted while you are orienting your new employee. This gives new employees the message that they are the most important item on your agenda.

2. **Introduce the new employee to their neighbors.** Provide staff members with the new employee's résumé and job description and advise them to follow a meeting format that includes sharing a description of their own positions, ways in which their roles interact with that of the new hire, and how they might expect to work together in the future. This is also a good time to assign a mentor or buddy to the new hire as an immediate resource for any questions and key information about organizational culture and goals.

3. **Schedule one-on-one time** to ensure you connect regularly with the new employee. If you can't do this on a weekly or bi-weekly basis, schedule meetings to provide feedback at 30-, 60-, and 90-day checkpoints.

4. **Clarify the company culture.** Again, to avoid future confusion (or embarrassment), provide the employee with company information, including vision, mission, and values. If your organization has a new employee handbook, make that available, as well.

5. **Create a balance.** The first day is always tough. Vary the first day's schedule by including less formal gatherings between meetings. Arrange for a group of staff members to treat the new employee to lunch on the first day to provide a little non-meeting relief and levity.

PRACTICALITIES

6. **Have the employee's workstation set up and ready to go.** An empty workstation is to a new employee what an unkempt home is to a houseguest. Before the employee arrives on day one, stock their workstation with everything from paper and pens to keys and, if possible, business cards. Make sure the phone and computer are set up, including voicemail and email accounts, are set up. Leave a copy of an organizational chart, staff list, and phone directory on the new hire's desk.

7. **Have relevant paperwork ready.** Coordinate with HR to make sure all administrative forms—such as employment, direct deposit, and benefits—are ready to be completed on day one so your new employee can get these important matters taken care of right away.

Source: Adapted from http://employer.careerbuilder.com/jobposter/small-business/article.aspx?articleid=ATL_0192ONBOARDINGTIPS_s