

Onboarding is the process of helping new hires successfully assimilate into their positions. Research from Bersin & Associates show that employees are most vulnerable to leaving in the first 18 months of employment and 90 percent of employees make the decision to stay with their new employer within the six months. Implementing these onboarding best practices will result in improved employee retention and engagement, increased employee pride in your organization, and enhanced productivity. Indeed, implementing these best practices will drastically reduce the time taken for your new employees to reach full productivity. Though an effective onboarding process spans 1-2 years, there are many activities you can do shortly before your new hire begins their employment or within the first day or few weeks of their tenure.

### **Preparing for your employee:**

1. Prepare employee's paperwork. (Check with your HR representative to identify the specific paperwork required to have your employee legally start at your organization. Some of the forms may include: W-4, I-9, insurance forms, etc.).
2. Consider sending all the necessary forms electronically to be filled out beforehand.
3. Prepare employee's computer and workstation, phone, office supplies, etc.
4. Work with HR to schedule new employees for the new employee orientation session.
5. Work with IT and Payroll in creating accounts.
6. Update Job Description. (If needed).
7. Send a welcome announcement to everyone in your organization (Name, title or role, background and/or some personal information) (Make sure to check with your new employee to make sure that any personal information is approved).
8. Let your team know about the new hire and his or her background.
9. Schedule team and key stakeholders for the new employee to meet on first day.
10. Consider scheduling mandatory organization training for the new employee.
11. Make sure your team members know the day that this new employee begins employment.
12. Prepare a welcome email and/or a handwritten note to the new employee.

### **1<sup>st</sup> Day Activities:** (Note: Or first 2 weeks)

1. Welcome the new employee to you and your team.
2. Provide staff directory if available.
3. Show the employee their office and workstation.
4. Go over job description and expectations and provide a brief overview of your mission and goals and how this job role fits into the wider mission.
5. Discuss organization values, culture, and policies.
6. Discuss your management style, your expectations, and your culture.
7. Discuss safety and evacuation procedures.
8. Talk about team performance measures & your performance management system.
9. Discuss coaching, feedback, and recognition processes in your team.
10. Discuss your organization's performance evaluation and measurement processes.
11. Have the new employee sign the job description after discussion.
12. Schedule your first one-on-one meeting.
13. Discuss the mandatory training classes. (Online or virtual/in-person classroom).
14. Discuss the on-the-job training.
15. Go over the team norms.
16. Establish a relationship with a mentor.
17. Introduce your new employee to key stakeholders.
18. Take your new employee on a tour of your building. (first day or soon).
19. Take your new employee out to lunch.
20. Plan a get-acquainted team activity.
21. Consider giving your new employee a welcome gift or organization memento.
22. Consider having the employee take a styles assessment so that you know how to best communicate. (If the team has taken an assessment, share team results).
23. Consider assigning reading material for the employee - organization or job role.
24. Ensure that the new employee has added value by the first week of employment.

## Onboarding Best Practices

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| 1. Welcome and meet and greet new employee to your organization, department, and team                           |  |
| 2. Share your new employee's name, photo, role, and short bio with the team.                                    |  |
| 3. Give new hire a tour of the physical space and point out important spaces and fire exits.                    |  |
| 4. Discuss job description and ensure understanding of the job requirements.                                    |  |
| 5. Have the new employee sign the job description.  |  |
| 6. Discuss how the job role fits into the wider mission of your team and/or organization.                       |  |
| 7. Provide the new employee with a organization handbook explaining the organization's policies and procedures. |  |
| 8. Provide the new employee with a desk manual that describes in detail the steps to job tasks.                 |  |
| 9. Talk about how the team purpose and how the team impacts the wider mission.                                  |  |
| 10. Discuss the team standards and team norms.  |  |
| 11. Show new hire how to find and procure (office supplies, reimbursement, access to internet).                 |  |
| 12. Ensure all necessary paperwork has been completed by new hire for compliance.                               |  |
| 13. Schedule their first one-on-one meeting to go over job role and start building a relationship.              |  |
| 14. Identify a mentor for the new employee to ask questions.  |  |
| 15. Take a tour of your building.   |  |
| 16. Provide the new hire a list of people to meet within your organization.                                     |  |
| 17. Identify team processes and standard ways of doing things   |  |
| 18. Establish what is acceptable and unacceptable ways in relating with team members. (Team norms).             |  |
| 19. Discuss your expectations of a manager and your management philosophy.                                      |  |
| 20. Explain the performance management and goal setting processes.  |  |
| 21. Discuss professional development & leadership opportunities, including professional associations.           |  |
| 22. Ensure that the new team member is an aware of the WAC's and laws that pertain to their work                |  |
| 23. Create a positive work environment with your new employee by recognizing his/her performance.               |  |
| 24. Consider asking the new employee "how do you prefer to be recognized?"                                      |  |
| 25. Set up a meeting with some of your long-term seasoned employees with your new hires.                        |  |
| 26. Ask the new employee about his/her communication style so as to adapt your style to him/her.                |  |
| 27. Discuss your team meetings and the expectations you have for each team member.                              |  |
| 28. Introduce your new employee to their HR representative.   |  |
| 29. Discuss the EAP as a resource or tool that is a part of their benefits package.                             |  |
| 30. Add your new employee to any team or management email distribution lists.                                   |  |
| 31. Discuss team processes such as dealing with conflict and making decisions                                   |  |

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| 32. Plan a first assignment or provide new hire a list of goals for the first week of employment.   |  |
| 33. Debrief new hire on current and upcoming projects.  |  |
| 34. Encourage input by your new employee – “How are things going?”  |  |
| 35. Encourage your new employee to share with you observations as they have “new eyes” to your team.                                      |  |
| 36. Make sure employee receives necessary skills and regulatory training (safety/sexual harassment).                                      |  |
| 37. Provide opportunities for you to discover your new employee’s strengths.  |  |
| 38. Assign work projects that align with those new employee’s strengths.  |  |
| 39. Provided frequent feedback to your new employee.  |  |
| 40. Involve key stakeholders and schedule check in meetings and opportunities to build relationships with people outside your department. |  |
| 41. Ascertain the employee’s preference for receiving recognition and learning style.   |  |
| 42. Describe some of your organization’s “do’s and don’ts as they relate to communicating with the public.                                |  |
| 43. Make sure the employee is familiar with your organization’s policies, especially those that relate with his/her role.                 |  |
| 44. Discuss any office/cubicle etiquette that the new employee needs to be aware of.  |  |
| 45. Encourage your new employee to meet with other leaders, including organization elected.   |  |
| 46. Consider milestone meetings – such as 30, 60, 90 and 120 days on the job – and up to one year to check in on employee progress.       |  |
| 47. Make onboarding participatory.  |  |
| 48. Use technology for some onboarding activities to help facilitate a consistent onboarding process.                                     |  |
| 49. Encourage new employees to initiate information and feedback seeking.   |  |
| 50. Conduct a new hire survey after 90 days to assess your onboarding process & update your process based on feedback.                    |  |

*Employee onboarding, the orientation or mainstreaming process of a new position, is a crucial element in both individual and organizational development and establishes a foundation for future success."*

*-The First 90 Days, Michael Watkins*