



# From Orientation to Onboarding

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# Introduction

## What is onboarding?

A key part of an organization's talent management plan, onboarding is the process of integrating employees into their new work environment. It is the last stage of the recruitment process and the first steps towards retention. Onboarding focuses on the following:

- a strong employer welcome,
  - affirmation of the employee's right choice in a job,
  - affirmation that the employee fits into the organization, and
  - long-term relationship building.
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## What is the difference between orientation and onboarding?

New employee orientation generally involves a first-day session or a first week of activities that familiarizes the employee with the organization's structure, mission, and policies. It typically includes reviews of the employee handbook and the completion of necessary payroll and benefits paperwork. Onboarding is, however, a much more comprehensive approach that starts before orientation and extends well beyond the first few days. It provides a more strategic plan for employee success than orientation alone.

In fact, the onboarding process can last from three months to two years, depending on the position.

Onboarding includes:

- a structured way to give new employees more information about the organization, as well as more opportunities to understand the culture, mission, and goals, and
  - a mentor assignment and a system for interviews with co-workers, managers, and executives during the employee's first few months, all focused on strengthening the employee's bond to the organization and its people.
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## Why is onboarding important?

Having devoted the time and resources to compete for talent, "quick" turnover is costly. In fact, statistics show that employees are most vulnerable to leaving an organization for 18 months after they are hired. Making a good first impression is therefore crucial. Effective employee onboarding serves three interrelated purposes.

- First, it ensures that the employee feels welcome, comfortable, prepared, and supported.
- These feelings increase the new hire's ability to make an impact (be productive) within the organization, both immediately and over time.

- Finally, employee success leads to satisfaction and retention, which allows the organization to continue to meet its mission. A well-designed onboarding program reduces costs, hastens time to productivity, and improves retention.
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### **Whose responsibility is onboarding?**

Onboarding is successful only when Human Resources and line managers are both actively involved. The goal of this partnership is to establish a long-term relationship with the employee that begins even before the employee is hired and will endure the everyday trials of the workplace. While HR plays a key role, specifically in the early recruitment and orientation phase and in guiding the onboarding process, the line manager must be proactive and engaged in facilitating the employee's successful integration into the organization over time.

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### **Will one onboarding strategy address all employees?**

Multiple approaches to onboarding are necessary to address the varying levels and responsibilities of employees as well as their experiences and expectations. While one basic list of items to be completed at each step will be consistent, variations in the length of the process, the tactical approaches to integration, and the staff involved may change based on the needs of the newly hired employee.

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# New Employee Onboarding Checklist

## Manager Responsibilities

**Prior to First Day:** The goal is to plan and prepare for the employee's arrival so that the employee does not arrive to chaos, but to an organized and prepared workplace.

WORK AREA
<input type="checkbox"/> Assign a workstation/phone extension
<input type="checkbox"/> Establish computer, network, and telephone access (includes set up of required software and hardware and Network login)
<input type="checkbox"/> Order furniture as needed
<input type="checkbox"/> Order office supplies, keys, name plate, business cards, and corporate phone or credit cards
<input type="checkbox"/> Order any other equipment or tools new employee will need
<input type="checkbox"/> Ensure email set up (with access or password)
<input type="checkbox"/> Ensure telephone with voicemail set up
<input type="checkbox"/> Acquire building and floor access cards or security badge
<input type="checkbox"/> Gather vital reference materials (i.e., phone directory, organizational chart with titles and pictures, staff list including new hire, other contact lists, voice mail and email instructions, new employee handbook)
<input type="checkbox"/> Ensure all administrative forms are prepared and ready to be completed
<input type="checkbox"/> Obtain items with logo or brand to give on first day as welcome gift – a nice touch to say we are glad you are here and you are a part of our team

## COMMUNICATION

- Welcome e-mail or letter to employee after offer is accepted to allow employee access to organization's intranet to view policies, benefits information, FAQs about agency, and orientation schedule/agenda
- Provide at least one contact and encourage the new employee to ask questions prior to start date by email or phone
- Use technology and on-line access to coordinate multiple phases of pre-boarding and avoid stacks of paper forms and paper manuals (i.e., have employees review benefits information at their leisure, make selections, and complete forms; provide a welcome video from top executive; sign up for badges and email; create e-based learning overview of the organization)
- Call the new employee to welcome him or her a few days before the start date. Remind him/her to bring completed paperwork and identification on the first day and ensure he or she knows where to park
- Notify co-workers and key contacts of start date
- Create a welcome sign, organize welcome gathering, or buy a card or gift

## GENERAL SUPPORT

- Schedule employee for New Employee Orientation Session
- Schedule times for the new employee to meet with key staff members
- Create a training schedule for the employee's first week or longer
- Assign a mentor or a buddy as an immediate resource for any questions and to help guide the employee's relationship building, knowledge attainment, and problem solving
- Discuss the responsibilities of mentor with selected candidate to ensure understanding of the role (Choose mentors who are interested, positive, knowledgeable, and personable)
- Gather job specific resource information (i.e. job description, reference materials, manuals, etc.)

## First Day on the Job

The goal is to make a good first impression by focusing on welcoming the employee to the corporate family not solely on completing the required forms. Orientation should reinforce this focus by being simple and interesting

- Make sure manager or a designated staff member is present to greet the new employee
- Introduce new employee to mentor
- Introduce the new employee to staff and team members/co-workers (or arrange a small gathering to welcome the new employee with a cake or other food items)
- Introduce staff to executive team, if available
- Coordinate a site/office tour (include copy machine, mail room, employee mailboxes, lunch room, and restrooms)
- Accompany the new employee to lunch (or arrange a group of staff members to have lunch together)
- Provide employee with a list of local restaurants for easy lunch options
- Meet with employee to discuss job description (give copy), responsibilities, and initial expectations
- Review training schedule for at least first week
- Review and explain on-line resources (preferably regularly updated policies and procedures that are accessible here versus in paper form)
- Coordinate basic telephone and computer instruction
- Take employee to New Employee Orientation Session

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## New Employee Orientation

The goal is to create an inspiring experience that reassures new hires they made the right choice and lays the groundwork for high employee engagement.

- Don't try to cram too much information in one session
- Use various mediums (i.e., video, intranet, presentations) to break the information into more manageable components
- Review mission, values, work conditions, and policies of organization
- Review and sign up for benefits, direct deposit, deductions, and other programs
- Complete required governmental forms
- Review payroll processing including time and attendance reporting requirements
- Review basic guidelines (i.e., security, parking, dress, office and work hours, lunch and break times, supplies, printer/copier/fax, shipping and receiving, local amenities)

- Review security and safety procedures
  - Review policies on personal use of telephone and computer
  - Review Sick/Emergency Contact phone number and process
  - Ensure employee knows where to get information about topics covered when he or she begins to reflect on the day's content
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### **During First and Second Weeks on the Job**

The goal is to ensure the employee understands the mission of the agency, the responsibilities of the job and management's expectations as well as to assist the employee's integration into the organization.

- Ensure mentor and new employee are meeting and establishing a productive relationship
- Ensure that some work assignments are ready for the employee so that he or she can feel productive immediately
- Share unwritten rules, nuances, and traditions with employee (such as casual Friday) Review relevant incentive programs
- Overview department functions and team member responsibilities
- Review other departments' overall functions and highlight internal customers
- Schedule meetings with staff members from outside employee's team or work group to give employee view of whole organization
- Assist employees in developing their own internal networks
- Arrange lunch/breakfast meetings with co-workers
- Review relevant decision making processes with employee
- Meet with employee to discuss how best to build relationships between themselves and other employees and to discover interests, challenges, and balance of work and family issues
- Consider scheduling a lunch with the employee and his or her spouse
- Ensure employee understands how his or her role fits with the goals of the organization
- Meet with employee to establish goals and job expectations and to complete planning stage of performance evaluation and review performance management process
- Meet with employee and create a development plan to insure acquisition of needed job specific skills and knowledge
- If employee will supervise others, ensure he or she meets with direct reports one-on-one and as a group
- If the employee has been promoted from within the organization, a transition guide/plan should be developed by the manager and a senior mentor/coach should be assigned to advise the promoted manager on

the unwritten rules at the next level (specifically on how to build relationships with new/old peers and subordinates and on how to manage the heightened politics and increased ambiguity)

- If the employee is an executive or senior manager, assist with a plan to establish key connections, build strong relationships, and build good credibility (specifically address how quickly change can be made and accepted within the organization)

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### **Before End of First 30 Days on the Job**

The goal is to review the expectations of the organization and the employee, to discuss progress made, and to continue efforts towards integration into the organization.

- Meet several times to:
  1. Discuss initial experiences and how they are matching employee's expectations
  2. Discuss any concerns or issues the employee has
  3. Review progress toward initial goals
  4. Review progress on development plan
  5. Identify any additional systems or job specific training needed
  6. Identify any upcoming opportunities to meet with key individuals
  7. Answer any questions
- Solicit feedback from employee while the initial onboarding process is fresh in his or her mind
- Always be aware of opportunities to integrate new hires into their work groups and into the organization as a whole

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### **Before End of First 90 Days On The Job**

The goal is to provide guidance and feedback to the employee to ensure continued success and to make plans for his or her future with the organization.

- Meet several times to:
  1. Discuss experiences and how they match employee's expectations
  2. Review progress toward initial goals, adjust if necessary
  3. Discuss any concerns or issues the employee has
  4. Answer any questions

- Provide feedback on employee's performance to date and solicit feedback from employee
- Address any issues of concern
- Discuss career planning philosophy of organization and how it applies to employee
- Solicit feedback from employee about entire onboarding process and suggested changes
- Tailor the length of the onboarding program for employees based on needs and responsibilities (i.e., Six Months or End of First Year)