

# Employee Onboarding

**Connecting New Employees with the Organization and Job**

## The Purpose of Onboarding

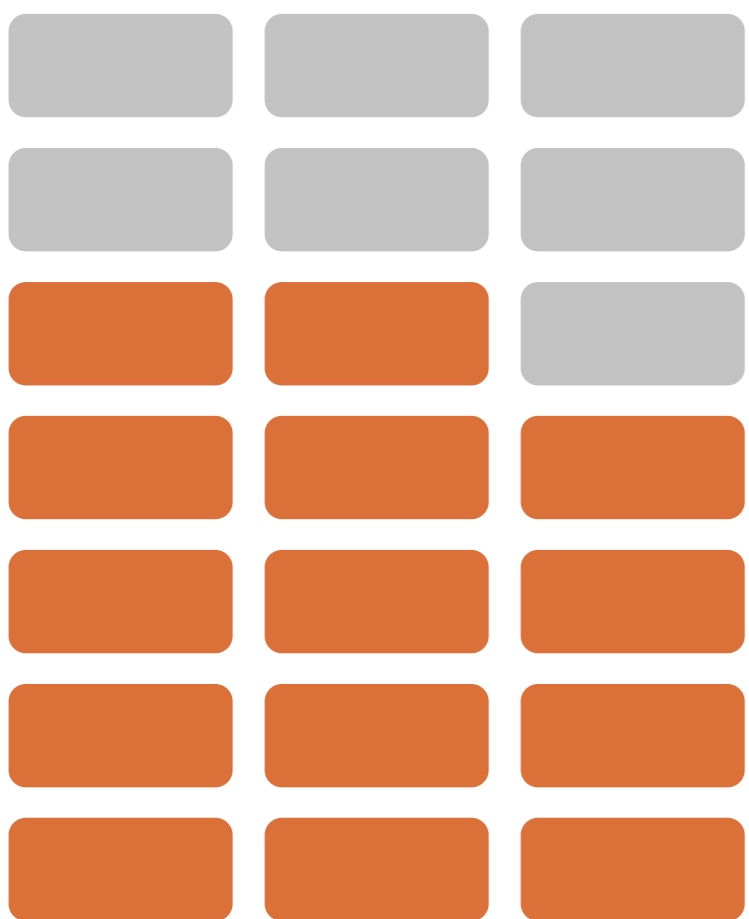
The purpose of onboarding is to help new hires transition into the roles at the company.

When implemented correctly, onboarding will alleviate stress as it improves the culture of an organization.



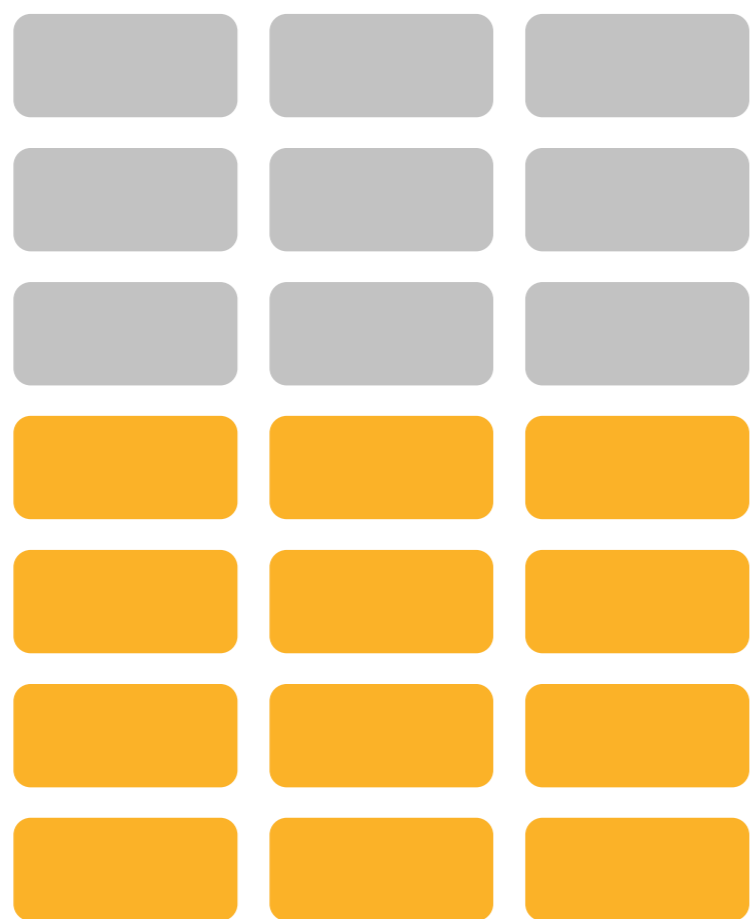
# Why Have a Formal Onboarding Program?

## Higher Retention & Engagement



69%

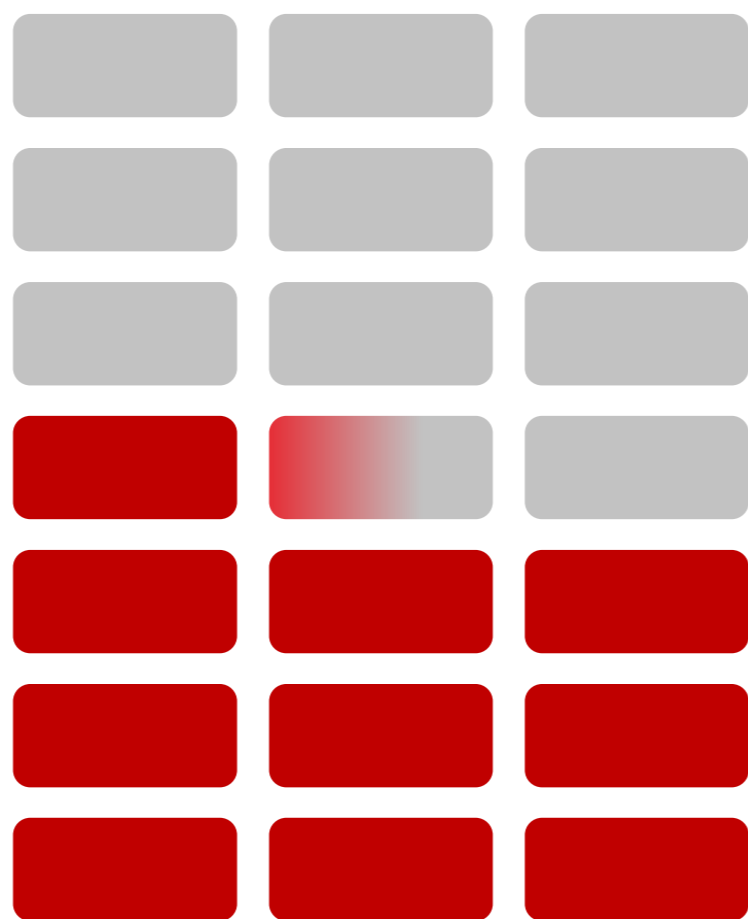
Of employees are more likely to stay with the company for three years if they experienced great onboarding.



54%

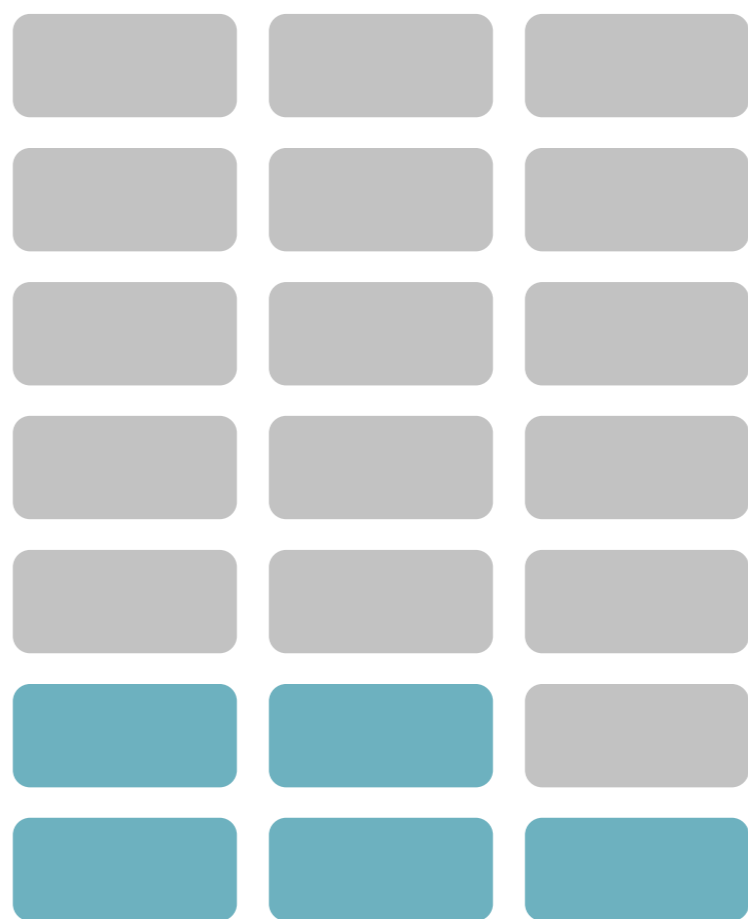
Of companies with an onboarding process report higher employee engagement.

## Faster Proficiency & Productivity



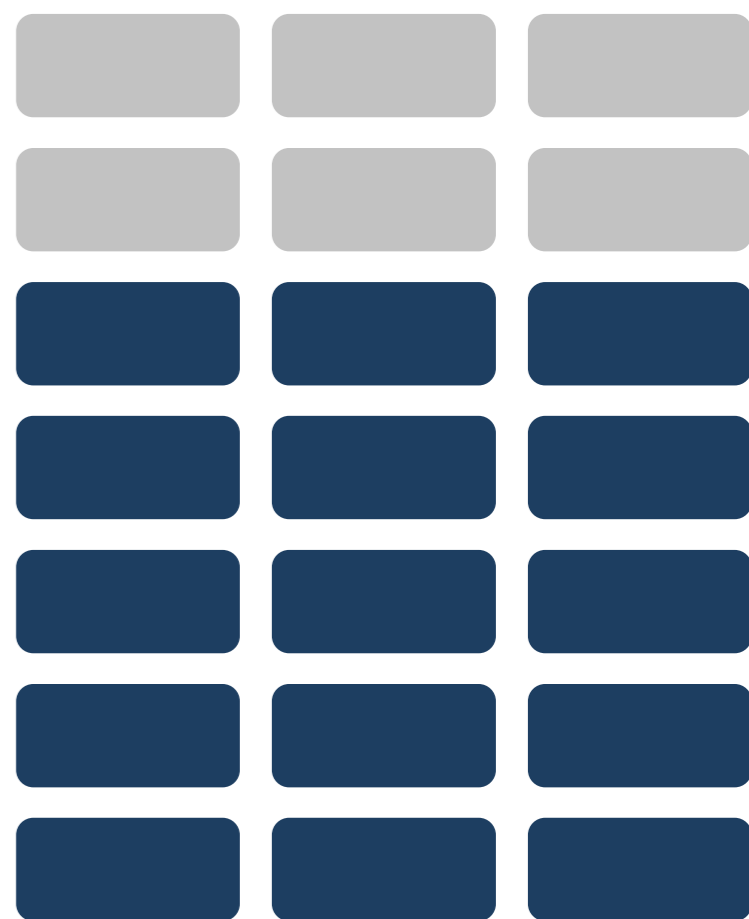
50%

Greater new hire productivity for companies with an onboarding process compared to those that do not have a process.



34%

Faster proficiency gains from longer onboarding programs than shorter ones.



77%

Of employees who reach their first performance goals completed formalized onboarding. This drops to 49% with no formal onboarding.

# ITN ONBOARDING PROGRAMS

Start new employees off the right way by having a standard onboarding program.

Basic Compliance, Role Definition & Expectations	Video & Management	Culture & Connection
<p><i>Focuses on teaching employees basic legal and policy-related rules and regulations and ensuring employees understand their job and all related expectations.</i></p>	<p><i>Adds an orientation video and a checklist for onboarding management and leaders.</i></p>	<p><i>Provides employees with a sense of organization norms and introduction to building interpersonal relations and information networks.</i></p>
<ul style="list-style-type: none"> <li>• <b>Pre-Boarding Checklist</b> with templates including welcome email, notification to employees, and HR documents.</li> <li>• <b>Onboarding Checklist</b> with defined activities for the first 30 days of employment.</li> <li>• <b>Welcome presentation materials</b> includes script and presentation to welcome new employees on their first day.</li> <li>• <b>Manager Orientation Checklist</b> provides the manager or supervisor with a schedule of things to cover with the new employee over the first 90 days of employment.</li> <li>• <b>Orientation Performance Review Process</b> setup to evaluate and measure the new hire's job readiness with a 30-60-90-day review.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Basic Compliance, Role Definition &amp; Expectations Package</b></li> <li>• <b>Orientation Video</b> features animated characters professionally narrated to welcome new employees to the organization and provide information on the company history, benefits, and culture. Great tool for recruiting too!</li> <li>• <b>Orientation Program Checklist for Managers</b> provides a schedule of activities that newly hired or promoted managers should follow as part of their leadership orientation.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Video &amp; Management Package</b></li> <li>• <b>Engaging Virtual Simulation</b> with single point of access to orientation videos, self-paced training, and other new hire materials. Be seen as an innovative leader when new employees access the 360-degree interactive simulation using any device or smartphone. Up to 5 company locations; i.e., main lobby, breakroom, employee areas, president office, board room, etc.</li> <li>• <b>Mentor/Peer Coaching Guide</b> that is role-specific includes workbooks for the new employee and coach of a single job role.*</li> </ul>
		<p><i>*Mentor/Coach Workbooks for Additional Job Roles Available.</i></p>

# BASIC COMPLIANCE

Focuses on teaching employees basic legal and policy-related rules and regulations.

**Pre-Boarding Checklist** with templates including welcome email, notification to employees, and HR/management tasks needed to setup new employees.

**Onboarding Checklist** with defined activities for the first 30 days of employment.

**Welcome presentation materials** includes script and presentation to welcome new employees on their first day.

**PHASE 1: FROM OFFER OF EMPLOYMENT THROUGH DAY 1**

Process Standards and Supporting Tools

Onboarding Action	Responsible	Timing	Tools	Toolkit Page
Extend offer in writing	Hiring Manager	Offer Day	Sample Offer Letters for Salaried and Weekly Employees	16-19
Offer letter signed and background check paperwork completed	Hiring Manager or HR Contact	Offer Day		
Schedule Orientation by phone and follow up with an email, text, or letter that includes the details and lists required documents (driver's license, social security card, etc.).	Hiring Manager or HR Contact	Before Day 1	Sample Welcome Email or Letter with date, time, location of orientation, dress code, required documents, etc.	20
Manager calls New Hire a few days before Orientation/Day 1 to express excitement for New Hire to start and to remind of Orientation day, time, location	Hiring Manager	Before Day 1		
New Hire receives Key Contacts list with names & contact information of team members responsible for their onboarding.	Hiring Manager or HR Contact	Offer Day	Key Contacts List	22
Checklists of onboarding responsibilities for all involved.	Hiring Manager or HR Contact	Before Day 1	Onboarding Actions Checklist	23-25
New Hire attends Orientation (in class or one-on-one with Hiring Manager, HR Contact, etc.)	Hiring Manager	Day 1	<ul style="list-style-type: none"> <li>Materials Checklist for Orientation</li> </ul>	26
	HR Contact General Manager		<ul style="list-style-type: none"> <li>New Hire Orientation Agenda/Outline</li> <li>Materials for Orientation:                             <ul style="list-style-type: none"> <li>Employee Handbook</li> <li>Human Resource forms to complete</li> <li>ABC Policies</li> <li>Links to LMS videos</li> <li>PowerPoint presentation</li> </ul> </li> </ul>	27 Flash Drive
All required Human Resource forms completed (during Orientation)	HR Contact	Day 1	<ul style="list-style-type: none"> <li>Checklist of Human Resource forms required</li> </ul>	

**SECTION 1 – Onboarding Actions Checklist**

Phase 1: From Offer of Employment Through Day 1

Onboarding Action	Hiring Manager	HR Contact	General Manager	Mentor	COMPLETED (sign off here)
Extend offer in writing	X				
Offer letter signed and background check paperwork completed	X	X			
Schedule Orientation by phone and follow up with an email, text, or letter that includes the details and lists required documents (driver's license, social security card, etc.).	X	X			
Manager calls New Hire a few days before Orientation/Day 1 to express excitement for New Hire to start and to remind of Orientation day, time, location	X				
New Hire receives onboarding checklist with names & contact information of team members/managers responsible for each step (HR or Hiring Manager is responsible for scheduling and seeing steps through, but New Hire gets a copy so he/she knows what to expect)	X				
New Hire attends Orientation (in class or one-on-one with Hiring Manager, HR representative, etc.)	X		X		
All required Human Resource forms completed (during Orientation)	X	X			

**Welcome to ABC!**  
**New Hire Orientation**

**DO:**  
Have orientation room ready with coffee, water, light snacks, pens. Have lunch brought in for the new hires.

Take a few minutes to introduce yourself (your position, how long you have been with ABC).

Have each of the participants introduce themselves.

**NOTE:**  
It is recommended that you have each participant sign in so that you can enroll them in the LMS and mark them complete after the class is finished.

**SPECIAL NOTE:**  
All documents contained on the flash drive are up-to-date as of the printing and distribution of this program. It is strongly advised that you check for updates prior to facilitating this course.

# ROLE DEFINITION & EXPECTATIONS

Focuses on ensuring employees understand their job and all related expectations.

**Manager Orientation Checklist** provides the manager or supervisor with a schedule of things to cover with the new employee over the first 90 days of employment.

**Orientation Performance Review Process** setup to evaluate and measure the new hire's job readiness with a 30-60-90-day review.

## How Long Do New Hires Ride-Along or Sit Side-by-Side?

Role	Ride-Alongs	S
CSR	Depending on who the CSR supports: <ul style="list-style-type: none"> <li>1 Day with HVAC Technician</li> <li>1 Day with Comfort Advisor</li> <li>1 Day with Plumbing Repair Specialist</li> <li>1 Day with Plumber</li> <li>1 Day with Installer</li> </ul>	•
Dispatch	Depending on who the Dispatcher supports: <ul style="list-style-type: none"> <li>1 Day with HVAC Technician</li> <li>1 Day with Comfort Advisor</li> <li>1 Day with Plumbing Repair Specialist</li> <li>1 Day with Plumber</li> <li>1 Day with Installer</li> </ul>	•
Comfort Advisor	With HVAC Technician: <ul style="list-style-type: none"> <li>If highly experienced (as a technician him/herself): 1 Day minimum to learn ABC processes, etc.</li> <li>If NOT an experienced HVAC technician: 5+ days</li> </ul> With HVAC Installer: <ul style="list-style-type: none"> <li>1 Day</li> </ul>	• • •
HVAC Technician	<ul style="list-style-type: none"> <li>Depending on experience, until job skills and PROS behavior checklist is mastered</li> <li>1 Day with Plumber (more if cross-training)</li> </ul>	• • •
Plumbing Repair Specialist	With Plumber only: <ul style="list-style-type: none"> <li>If highly experienced (as a plumber him/herself): 1 Day minimum to learn ABC processes, etc.</li> <li>If NOT an experienced plumber: 5+ days</li> </ul>	• • •
Plumber	<ul style="list-style-type: none"> <li>Depending on experience, until job skills and PROS behavior checklist is mastered</li> <li>1 Day with HVAC technician (more if cross-training)</li> </ul>	• • •
Lead HVAC Installer	With HVAC Technician: <ul style="list-style-type: none"> <li>If highly experienced (as a technician him/herself): 1 Day minimum to learn ARS processes, etc.</li> <li>If NOT an experienced HVAC technician: 5+ days</li> </ul> With Comfort Advisor: <ul style="list-style-type: none"> <li>1 Day</li> </ul>	• • •

Job Process Checklist  
Service Technician

Instructions: Mentor/Supervisor should demonstrate each action listed in the "Action Demonstrated" column. Mentor/Supervisor should place a check in the box titled "New Hire Completed" next to each action he/she witnesses the New Hire demonstrate.

Step	Action Demonstrated	New Hire Completed
1 – Arrival on site	Received history from dispatch	
	Put parking cones out	
	Parking in the correct spot	
2 – Introduction to customer	Knock on door and step back 3ft facing door	
	Hands by side and holding tool bag	
	Greet customer by name and present credentials	
3 – Technical	Give compliment	
	Put on shoe covers	
	Check thermostat	
	Check air filters	
	Check Freon pressure	
	Check sub cooling	
	Check amp draws (comp/fan)	
Check capacitors		
4 – Recommendations	Check for accessories	
	Tech offers 3 recommendations	
	Use check sheet and price book	
	Sit down with customer to discuss recommendations	

Strengths \_\_\_\_\_

Areas for improvement \_\_\_\_\_

Date of Completion: \_\_\_\_\_

New Hire Name: \_\_\_\_\_

New Hire Signature: \_\_\_\_\_

Mentor/Supervisor Name: \_\_\_\_\_

Mentor/Supervisor Signature: \_\_\_\_\_

## 30 Day Feedback Session

Employee Name: \_\_\_\_\_ Date of Hire: \_\_\_\_\_

Position: \_\_\_\_\_ Supervisor: \_\_\_\_\_

- How are things progressing for you since your inception of employment?
- What's been going well? What are the highlights of your experiences so far?
- Which co-workers have been helpful since you arrived? (This is a great opportunity employees can be influential in retaining the new hire.)
- Are there any areas you need to improve upon? What can we do to help you successful in your job? (Don't ask these two questions unless you are prepared to follow up you can build false expectations.)
- Are there any obstacles you're experiencing?
- Do you know what PROS stands for?
- Do you have everything you need to serve the customer according to our PRT?
- If you could change something about your job, what would it be?
- What would make your job more satisfying?
- What talents are not being used in your current role?
- Compare the job and the organization to what we explained it would be like.

## 90 Day On-Boarding Recap

Employee Name:	EMPL ID:
Job Title:	Date of Hire:
Department:	Evaluation Period: MM/DD/YR
Supervisor:	From: To:

Please rate the employee's performance at the end of the period indicated above in terms of the performance factors listed. Feel free to attach additional sheets for comments, if necessary.

Performance Factor	Superior	Above Standard	Standard	Below Standard	Unrated
1. PROS Compliance – SERVE Standards					
2. Performance – KPI's					
3. Quality of Work – Accuracy/Effort					
4. Dependability – Time and Attendance Compliance					
5. Observance of Rules – Dress Code, Safety Rules					
6. Carrying out Instructions – Sense of Urgency, Completes Tasks/Deadlines					
7. Workplace Conduct – Working Relations, Cooperation, "Can Do"					

Supervisor's Comments: \_\_\_\_\_

Employee's Comments: \_\_\_\_\_

Employee Signature:	Date:
Supervisor Signature:	Date:
General Manager Signature:	Date:

# VIDEO & MANAGEMENT PACKAGE

Adds an orientation video and a checklist for onboarding management and leaders.

## BASIC COMPLIANCE, ROLES & EXPECTATIONS PACKAGE

**Orientation Video** features animated characters professionally narrated to welcome new employees to the organization and provide information on the company history, benefits, and culture.

**Orientation Program Checklist for Managers** provides a schedule of activities that newly hired or promoted managers should follow as part of their leadership orientation.

**PHASE 1: FROM OFFER OF EMPLOYMENT THROUGH DAY 1**  
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Manager calls New Hire a few days before Orientation/Day 1 to express excitement for New Hire to start and to remind of Orientation day, time, location.	Hiring Manager	Before Day 1		
New Hire receives Key Contacts list with names & contact information of team members responsible for their onboarding.				
Checklists of onboarding responsibilities for all involved.				
New Hire attends Orientation (in class or one-on-one with Hiring Manager, HR Contact, etc.)				

**SECTION 1 – Onboarding Actions Checklist**  
Phase 1: From Offer of Employment Through Day 1

Onboarding Action	Hiring Manager	HR Contact	General Manager	Mentor	COMPLETED (sign off here)
Extend offer in writing	X				
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Manager calls New Hire a few days before Orientation/Day 1 to express excitement for New Hire to start and to remind of Orientation day, time, location.					
New Hire receives onboarding checklist with names & contact information of team members/managers responsible for each step (HR or Hiring Manager is responsible for scheduling and seeing steps through, but New Hire gets a copy so he/she knows what to expect)					
New Hire attends Orientation (in class or one-on-one with Hiring Manager, HR representative, etc.)					
All required Human Resource forms completed (during Orientation)					

**90 Day On-Boarding Recap**

Employee Name: \_\_\_\_\_ EMPL ID: \_\_\_\_\_  
 Job Title: \_\_\_\_\_ Date of Hire: \_\_\_\_\_  
 Department: \_\_\_\_\_ Evaluation Period: MM/DD/YR  
 Supervisor: \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_

Please rate the employee's performance at the end of the period indicated above in terms of the performance factors listed. Feel free to attach additional sheets for comments, if necessary.

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5. Observance of Rules – Dress Code, Safety Rules					
6. Carrying out Instructions – Sense of Urgency, Completes Tasks/Deadlines					
7. Workplace Conduct – Working Relations, Cooperation, "Can Do"					

Supervisor's Comments: \_\_\_\_\_  
 Employee's Comments: \_\_\_\_\_

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Supervisor Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 General Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_



**NEW HIRE TRAINING MATRIX OF REQUIRED COURSES**

Course	Audience	Deadline	LMS Time	Recommended Delivery Method
Introduction to ABC	All Employees	First 30 Days	8 minutes	Facilitator-led During Orientation Day 1
Business Ethics	All Employees	First 30 Days	40 minutes	Facilitator-led During Orientation Day 1
Senior Care Customer Service	All Employees	First 30 Days	25 minutes	Facilitator-led During Orientation Day 1 - LMS video shown
Employee Handbook*	All Employees	First 30 Days	45 minutes	Facilitator-led During Orientation Day 1
Preventing Unlawful Workplace Harassment for Employees	All Employees	First 30 Days	30 minutes	LMS
Workplace Harassment Prevention for Managers and Supervisors	Supervisors and Above	First 30 Days	120 minutes	LMS
Safety Basics	All Employees	First 30 Days	45 minutes	Facilitator-led During Orientation Day 1 - LMS video shown
Introduction to PROS: Delivering Exceptional Service	All Employees	First 30 Days	60 minutes	Facilitator-led During Orientation Day 1
2017 Benefits	All FT Employees	First 30 Days	40 minutes	Facilitator-led During Orientation Day 1
Decision Driving	All Employees Who Drive a Company Vehicle	First 30 Days	90 minutes	LMS
PCI Compliance for Field Technicians	All Technicians	First 30 Days	10 minutes	LMS
Mindset Training	Comfort Advisors	First 30 Days	165 minutes	LMS
Sales Process Training	Comfort Advisors	First 30 Days	285 minutes	LMS
Calculating Block Loads Using Rheem Design Star	Comfort Advisors	First 30 Days	45 minutes	LMS
HR Compliance Manager Training	HR Staff	First 30 Days	145 minutes	LMS & DHRM Facilitated
Annual HIPAA Compliance Training	HR Staff, Supervisors and Above	First 30 Days	25 minutes	LMS
Payroll Regulations – What Every Manager Should Know	HR Staff, Supervisors and Above	First 30 Days	40 minutes	LMS
PCI Compliance for Office Staff	Office Staff Handling Payment / Credit Cards	First 30 Days	10 minutes	LMS

# CULTURE & CONNECTION PACKAGE

Provides employees with a sense of organization norms and introduction to building interpersonal relations and information networks.

## BASIC COMPLIANCE, ROLES & EXPECTATIONS PACKAGE + VIDEO & MANAGEMENT PACKAGE

**PHASE 1: FROM OFFER OF EMPLOYMENT THROUGH DAY 1**

Process Standards and Supporting Tools

Onboarding Action	Responsible	Timing	Tools
Extend offer in writing	Hiring Manager	Offer Day	Sample Offer, Salaried and
Offer letter signed and background check paperwork completed	Hiring Manager or HR Contact	Offer Day	
Schedule Orientation by follow up with an email, letter that includes the lists required documents (license, social security card, etc.), and to remind of Orientation/Day 1 excitement for New Hire and to remind of Orientation time, location			
New Hire receives Key Card with names & contact information of team members responsible for onboarding.			
Checklists of onboarding responsibilities for all involved			
New Hire attends Orientation (in class or one-on-one with Manager, HR Contact, etc.)			
All required Human Resources completed (during Orientation)			

**SECTION 1 – Onboarding Actions Checklist**

Phase 1: From Offer of Employment Through Day 1

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Extend offer in writing	X				
Offer letter signed and background check paperwork completed	X	X			
Schedule Orientation by phone and follow up with an email, text, or letter that includes the details and lists required documents (driver's license, social security card, etc.). Manager calls New Hire a few days before Orientation/Day 1 to express excitement for New Hire to start and to remind of Orientation day, time, location	X	X			
New Hire receives onboarding checklist with names & contact information of team members/managers	X				


**90 Day On-Boarding Recap**

Employee Name: \_\_\_\_\_ EMPLID: \_\_\_\_\_

Date of Hire: \_\_\_\_\_

Evaluation Period: MM/DD/YR From: \_\_\_\_\_ To: \_\_\_\_\_

	Above Standard	Standard	Below Standard	Unrated



**Engaging Virtual Simulation** with single point of access to orientation videos, self-paced training, and other new hire materials.



**Mentor/Peer Coaching Guide** that is role-specific includes workbooks for the new employee and coach of a single job role.\*

**MENTORSHIP/TRAINING PROCESS AND BEST PRACTICES**

**What is a Mentor/Trainer?**

A Mentor/Trainer is an experienced employee who advises and trains an employee with less experience. In many professional settings, Mentors/Trainers are formally assigned, but a mentorship/training can also happen informally between an experienced and less experienced employee. At ABC, we are intentional about the use of Mentors/Trainers in the development of our new employees and the betterment of our teams.

**Why Assign Mentors/Trainers at ABC?**

Our environment requires employees across all roles to get up to speed quickly. In addition, most roles within ABC are best learned 'on the job', with hands-on experience. The apprenticeship model of working with an experienced Mentor/Trainer is the most efficient and effective way of bringing new employees up to a productive, independent level of capability. The Mentor/Trainer also benefits by expanding his or her skill set in teaching the new hire. This relationship also offers the new employee with a resource for finding answers and resources that new employees have when joining ABC.

**How Are Mentors/Trainers Assigned?**

Best practices include:

- The Hiring Manager works with the Human Resource Contact to identify potential Mentors/Trainers for each role in his/her department.
- Hiring Manager works with Human Resources Contact to create a list of skills and processes a New Hire in each position should master at the end of 90 days.
- Once new employee(s) are hired, the Hiring Manager:
  - Considers the personalities of New Hire and possible Mentors/Trainers
  - Approaches possible Mentor/Trainer about the opportunity; reviews with him/her the checklist of skills & processes the New Hire needs to learn
  - Holds a meeting with New Hire and Mentor/Trainer to introduce each other and to set expectations for the relationship

**What Happens During the Mentorship/Training?**

- Initially, the Mentor/Trainer invests time by having the New Hire 'shadow' for several days or weeks (depending on the role and level of skill required). Sometimes this takes the form of Ride-Alongs or Side-by-Sides with the Mentor/Trainer, but not always (Ride-Alongs and Side-by-Sides might or might not be applicable, and even when they are, might not happen with the employee's Mentor/Trainer).
- As the New Hire gains skills, the Mentor/Trainer has the New Hire perform some job functions under the supervision/guidance of the Mentor/Trainer.
- Once the New Hire is functioning most on his/her own, the Mentor/Trainer checks in regularly and is available for questions and further guidance.
- Over the course of the mentorship/training, the Hiring Manager checks in with both the Mentor/Trainer and the New Hire weekly to ensure the process is working and the employee is learning. This can be accomplished as part of the Manager's regular 'check in' meetings with the New Hire.



# ITN SERVICES

## OTHER DOCUMENTATION

We support your growing HR needs by establishing foundational documentation, processes and templates.

01



### JOB DESCRIPTIONS

- › Review five (5) key positions
- › Collect existing documentation on roles and responsibilities
- › Interview selected supervisors/employees
- › Create template for additional roles

02



### EMPLOYEE HANDBOOK

- › Review common sections
- › Review existing policy documents
- › Work with HR to define company-specific guidelines

03

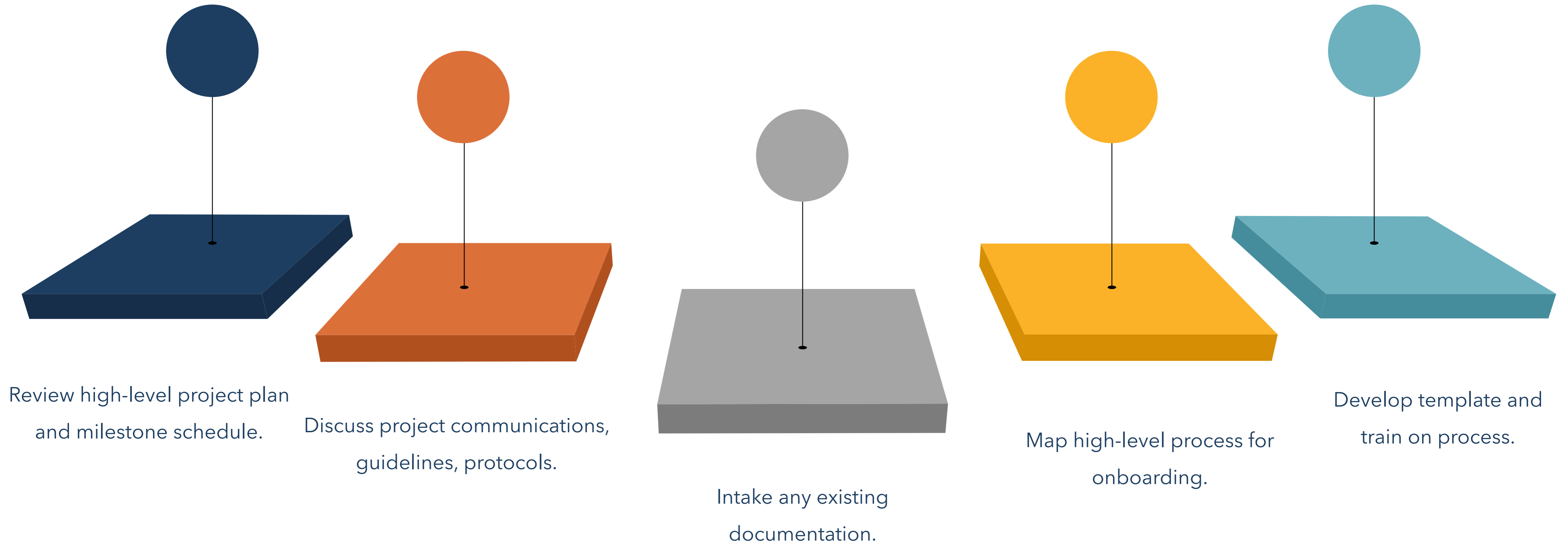



### POLICIES & PROCEDURES

- › Collect drafts of existing office policies for each location
- › Work with HR to define location policies

# READY TO GET STARTED

Most projects commonly follow these five steps.



A group of four business professionals (three men and one woman) are gathered around a table in a meeting. One man is leaning over the table, looking at a document. Another man is sitting at the table, looking towards the man leaning over. A woman is sitting at the table, looking towards the man leaning over. A fourth woman is sitting at the table, looking towards the man leaning over. The background is a bright, modern office space with large windows and indoor plants. A dark blue circular overlay is positioned in the center of the image, containing white text.

Are you looking for an engaged, informed,  
educated, skilled workforce that can make  
a meaningful contribution to  
organizational success?

**Let ITN show you how.**

A background image of an office setting with several people. A woman with curly hair in a light-colored blazer is smiling and looking towards the right. In the foreground, the back of a woman's head with long brown hair is visible. To the left, a man is looking towards the center. In the background, a man in a white shirt is standing and looking towards the right. The scene is dimly lit with a blue tint.

THANK YOU  
KEEP IN TOUCH WITH US

**ITN**

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