



ON-BOARDING GUIDE





Orienting new associates to their workplaces and jobs is one of the most important steps in the hiring process. An effective on-boarding process will not only help in getting new associates up to speed faster, it will also lead to increased productivity, associate retention, and better alignment between what the associate does and what the organization expects of them. A well-designed process will save time for the hiring manager as realistic job expectations are developed and set with the new associate.

As a leader, you play an important role in an associate's acclimation to the company. Leadership is about inspiring and empowering others. How you handle the acquisition, accommodation, assimilation, and acceleration of new associates speaks volumes to everyone.

Key Elements of On-boarding

- The Welcome
- Setting Mutual Expectations
- Training
- 30/60/90

Benefits of Effective On-boarding

- ***Enhanced engagement***
- ***Increased productivity***
- ***Improved retention***

The Welcome

Purpose: Welcome each newly hired associate to the team. Our goal is for associates to be efficient, happy, contributing, successful, engaged employees.

The key elements of the welcome phase of on-boarding are as follows:

1. Review of activities and expectations that day, week, and month
2. Tour of facility and introductions to all team members and associates
3. Assure the new associate that they will have multiple opportunities over the coming 90 days to share specific feedback with their manager about the company, their role, expectations, and resources

Let's consider the welcome and how it plays out at your company. Think about the most common role you'll be on-boarding and answer the following questions:

What activities will occur for an associate on his/her first day on the job?

What do you expect this new associate to accomplish in the first week?

What are the most important introductions you will make as you tour the facility with the new associate?

Job Expectations

Purpose: Whenever we expect others to take action, it's important to set expectations. Always set clear expectations with new hires, with any change in role and responsibilities, when assigning a new project, and during a performance appraisal. It is important to have a documented job profile/description for each new associate. Consider the following tips as you define and document your expectations, obtain agreement, and prepare to hold the individual accountable:

1. Communicate in a clear and direct manner - use language that will be understood and be aware of body language
2. Be clear and specific about what's expected
3. Ask what the associate expects of you
4. Include and agree upon timelines
5. Set job expectations verbally, then in writing using the monthly Contracting for Performance Guide
6. Check for understanding by asking for a recap
7. Clarify, if necessary
8. Confirm new understanding
9. Ask for the associate's commitment
10. Hold associates accountable for keeping the commitments they make
11. If you choose not to use the monthly Contracting for Performance Guide, be sure to repeat some form of the expectations, agreement, and accountability conversation and documentation process each month

Remember to provide new associates time to get settled in their position. High expectations placed on star hires don't always deliver the results you hope for. Instead, try giving new associates time to ease into the position and assign a mentor or a top-performing peer.

Early expectations should be easily achievable - be realistic about what's possible. Also, keep in mind that new hires are unlikely to ask a lot of questions until they feel comfortable in their jobs.

What three key objectives will you ask new associates to meet during their first three months?

1. _____
2. _____
3. _____

Training

Purpose: The quality of employees and their development through training and learning are major factors in determining long-term profitability of any business. If you hire and keep good employees, it is good policy to invest in the development of their skills so they can increase their performance.

Research has shown the benefits of providing training and development to associates including increased productivity, reduced employee turnover, increased efficiency resulting in financial gains, and a decreased need for supervision.

Let's work through one specific position that you need to fill. Define the name of the position below and list all relevant and required training that a new associate must complete.

Position Title: _____

Required and Relevant Training:

Mentor Learning Program

Purpose: Studies have shown that having a mentor is a top factor affecting success, career satisfaction, and whether an associate will stay with an organization. Mentoring increases an associate's likelihood of success and their level of achievement.

Providing a mentor to your new associate will create opportunities for personal growth, assist in developing their expertise, improve engagement, and accelerate performance.

Mentors serve several important functions:

1. They act as role models and offer guidance
2. They provide an independent sounding board for ideas, issues, and concerns
3. They help integrate new associates
4. They provide a consistent source of information for the people they mentor
5. They act as advocates for the development of the individuals they are mentoring

The mentoring partnership is an agreement between two people, the mentor and the mentee, who are sharing experiences and expertise to help with a portion of the on-boarding process. You will want to select a top performer who has the desire to share what they know, what they have learned, and provide specific feedback to their mentee.

Select a position that you'll be on-boarding soon as a reference point to work through the following questions:

Position Title: _____

Who might be a good mentor for this position? _____

How will you prepare this associate to act as a mentor to a new hire?

What expectations will you set for the mentors you assign?

How will you recognize your mentors for their contribution to on-boarding new associates?

30/60/90 Day Acclimation Timeline

Purpose: To ensure your new hire has needed resources, establishes the foundation for high performance, and the associate becomes familiar with the company operations and people. Consider the following as you prepare to on-board your associate:

30-day Timeline Considerations

What must be accomplished by day 30?

Who can support the associate? For instance, whom do they need to know and what can the associate learn from others that will help them become a top performer?

What aspects of the most recent Associate Engagement results and/or related action plans would provide valuable insights for a newly hired associate?

Once you've discussed the topics above, check in with the associate on the following areas:

- Is there anything about this company, your role, or the expectations of your role that you'd like to discuss?
- Do you have all the resources you need to complete your work and meet the expectations we've agreed upon?

60-day Timeline Considerations

Consult the on-boarding checklist and define a list of important activities for the 30-60 day window.

Activity: Who is responsible for this activity?

Identify 1-2 early wins that can be assigned by day 60 and accomplished by day 90

1. _____

2. _____

Check in with the associate on the following areas:

- Is there anything about this company, your role, or the expectations of your role that you'd like to discuss?
- Do you have all the resources you need to complete your work and meet the expectations we've agreed upon?

90-day Timeline Considerations

Ensure you have the right person in the right role with the right support by day 70. To do so, utilize the Contracting for Performance Guide to set clear expectations and begin tracking associate performance. Once the guide has been started, check in with the associate on a monthly basis to review goals, set new objectives, and continue to invest in exceptional performance.

Consider setting up time with several other departments so the associate can learn more about other aspects of the operation, what specifically others do, how each team affects the client experience, and possible growth/development opportunities in the future.

Who would the new associate need to schedule time with in each department to accomplish the goals described above?

Check in with the associate on the following areas:

- Is there anything about this company, your role, or the expectations of your role that you'd like to discuss?
- Do you have all the resources you need to complete your work and meet the expectations we've agreed upon?

Associate Assignment

Purpose: This assignment is designed to get the associate to learn about your organization and the products and services that you offer.

To set this up, have a brief discussion with the associate about your company and its offerings. Then, give them some time to do some research and fact-finding exercises to provide answers to the items listed below (using co-workers, internet, other resources).

1. What is the history of our company?
2. What does our company excel at?

Schedule a de-brief to discuss associate's findings.

On-boarding Checklist

<p>On-boarding Begins</p> <p>As soon as the candidate accepts your offer for employment</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Set up e-mail and access to systems <input type="checkbox"/> Set up workstation/office and telephone <input type="checkbox"/> Set up or purchase computer/iPad <input type="checkbox"/> Order cell phone, if necessary <input type="checkbox"/> Ensure workstation is stocked with supplies – pens, staplers, tape, tools, etc. <input type="checkbox"/> Write welcome card
<p>T minus one</p> <p>One week prior to start date</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Send welcome card to associate's home or have on desk/workstation for Day 1 <input type="checkbox"/> Plan how department will welcome the new associate <input type="checkbox"/> Plan lunch with associate for first day <input type="checkbox"/> Assign a mentor and determine a plan for the mentor and the new associate to check in with one another for the first two weeks <input type="checkbox"/> Ensure all equipment-network ID, workstation, name plate, locker, phone, office-has been set up and is in good working order <input type="checkbox"/> Assemble written material, manuals, and documents that the new associate will need. Confirm associate ID has been created with HR and submit all necessary request forms <input type="checkbox"/> Schedule time for the new associate to spend time with HR to complete any hiring or HR documents on Day 1 <input type="checkbox"/> Contact new associate during the week prior to start date <input type="checkbox"/> Make arrangements for associate's uniform, if necessary
<p>Productive Start</p> <p>Day 1 and Week 1</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Introduce associate to team and send introductory E-mail to “broader” work group and other associates, as necessary <input type="checkbox"/> Provide overview of facilities and parking <input type="checkbox"/> Define standard working hours, clarify time off, sick leave procedure/policy, and confirm understanding of the company values and code of conduct <input type="checkbox"/> Provide building access/keys, if necessary <input type="checkbox"/> Have new associate spend time with HR to ensure all hiring documents are completed and all compensation and benefits components are reviewed <input type="checkbox"/> Review team organizational chart <input type="checkbox"/> Discuss job description and company, departmental, and personal goals <input type="checkbox"/> Review problem resolution process <input type="checkbox"/> Provide or schedule position specific required training (systems, safety, emergency procedures, etc.) <input type="checkbox"/> Provide any necessary phone contacts <input type="checkbox"/> Business cards, if necessary
<p>Check In</p> <p>Within 3 weeks of new associate's start date</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Payroll check—verify it was received <input type="checkbox"/> Make sure they know all necessary access codes/websites <input type="checkbox"/> Make sure they are added to proper E-mail distribution lists <input type="checkbox"/> Review most recent Associate Engagement results and any related action plans <input type="checkbox"/> Conduct Contracting for Performance Guide and set monthly follow up dates/times. <input type="checkbox"/> Make sure they know the performance review process <input type="checkbox"/> Ensure access to all necessary software, applications, etc. have been set up

