

**How to Successfully Onboard a New Employee**

HOW TO SUCCESSFULLY ONBOARD A NEW EMPLOYEE:

A Guide for Leaders

**MANAGER’S ONBOARDING GUIDE**

**What is Onboarding?**

Onboarding is a planned and systemic approach to welcoming and orienting new hires into an organization. Effective onboarding programs promote a number of benefits, including greater employee satisfaction, improved job performance, greater commitment to the organization, increased retention, and quicker time to productivity. A successful and effective onboarding process will support new hires and help them to feel that they are an important part of your team.

This onboarding kit provides tools, tips, guidelines, and checklists for the following:

1. Leader Onboarding Information
2. Leader Onboarding Checklists
	* Pre-hire
	* First day
	* First week
	* 30-days
	* 60-days
	* 90 days to one year
3. New employee announcement template
4. Check in meeting sample questions

Note: You are encouraged to utilize the entire tool kit if you’re new to the onboarding process. Once you are familiar with the process, feel free to only refer to the handouts that you need.

**Leader Onboarding Information**

**Your Role In Onboarding**

Do you remember your first days as a new employee? It was probably an exciting yet hectic time. Everything is different, the people, systems, language, culture etc. First impressions are so important, and the need to properly onboard new hires is critical to their successful future at Peoples Health. A positive onboarding experience can result in your new hire quickly acclimating to the organizational culture, department, and to their new position on your team.

Employee onboarding is about what your employees feels, sees and hears after they have been hired. While training does play a role in onboarding, it does not represent the entire scope of the process. As a leader, how *you* engage with impressionable new hires is critical to the success of the new hire. When you immediately create opportunities that make new hires feel like a welcomed part of the team, the likelihood that they will stay with the organization increases. Some interesting facts about onboarding according to a study conducted by the Wynhurst Group

* It takes only 21 days for a new hire to decide if they feel “at home”.
* 22 % of new hires do not return after the first 45 days of employment.

**Need for a Robust Onboarding Experience**

These statistics indicate the value and significance to ensuring a positive onboarding for new hires, and we want to prepare you for the job! This package is a resource that contains guidelines, checklists, and tips that you can utilize during the onboarding process. These resources are aimed to help you assist new hires to make a smooth transition into the organization. Here at Peoples Health, our mission is to provide high quality, cost-effective healthcare services to the members we serve. As a leader, you support this mission by ensuring that our most valuable assets – our employees – evolve to be star performers that provide excellent services to our members.

# Leader Onboarding Information

Please complete this form and check off the resources used below. Once completed, please return this form to the Education and Training Department.

New Hire’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Department/Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Direct Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Start Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 90 Day Review Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Assigned Onboarding Partner (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Check off all resources used:**

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| --- |
| * Leader Onboarding Checklist
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| * New Employee Announcement Template
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| * Sample Check-in Meeting Questions for Leaders
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Please submit this form to the Education and Training department via email to phn-education@peopleshealth.com.

Or, send via interoffice mail to Dawn Hagman in Education and Training (26th floor).

# Leader Onboarding Checklist

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| Once an employee accepts a position, the days or weeks leading up to that first day are critical in building a positive impression and relationship. Use this checklist to ensure a smooth transition. Pre-Employment – Important Steps to Take Before Your New Hire Arrives* Call and welcome the new hire. Tell them that you are happy to have them join the team!
* Arrange office start-up supplies for the new hire (stapler, paper, pens, paperclips, etc.). Make sure they have everything they need and know where to go on Monday for new hire orientation.
* Ensure a neat workspace is set-up (include a welcome card that team members sign).
* Compose a list of key documents for the new hire’s workspace (organizational chart, contact list, office map, etc.)
* Order business cards (This will help support the new hire in establishing key contacts).
* Send out an e-mail to everyone in the office so that they are prepared to welcome the new hire.
* Create a first-week schedule for new hires to follow when they are not in required training. This will help them to have something to do that is meaningful and helps them hit the ground running.
* 1:1 or small group meetings with other team members. During these meetings, team members might describe their work and how it integrates with the work the new team member does.
* 1:1 meetings with you to discuss job description, performance expectations, etc.
* Designated times for the new hire to review materials.
* Time alone at their workstation so they can digest all of the new information and make notes about what they have learned in meetings.
* Set aside time in your calendar to make sure you are available for the first few days and weeks of your new hire’s tenure.
* Provide a list of key contacts that the new hire will be working with, set up staggered, short meet, and greet meetings. These may continue for several weeks.
* Identify an onboarding partner for the new hire within your department and meet with him/her to discuss their role and some background on the new hire (see Onboarding Partner Program).
* If you cannot take the new hire to lunch, arrange for someone to take them to lunch on their first day in the office day (i.e., Onboarding Partner). Lunch is provided to the new hire for the first day of new hire orientation.

Day 1 – Important Steps to Take on Your New Hire’s First Day in the DepartmentDepartmental policies and procedures are important to review on day one with your new. Be sure to also prioritize interpersonal relationship building immediately with colleagues and key contacts for the new hire. * Review the new hire’s training and departmental agenda to answer any questions they may have.
* Review only the most critical pieces of paperwork to complete. Remember that the rest can be completed within the next few days.
* Introduce the new hire to their colleagues and department personnel (Best practice: organically walk around and meet; Alternative: call a quick team meeting).
* Show the new hire their workspace and provide a tour of the facilities (break room, bathrooms, photocopiers, supplies, emergency exits etc.). Or designate a team member to give the tour.
* Review emergency procedures, what to do in case of an accident, and other safety issues and guidelines.
* Take the new hire to lunch if you can, or pre-select a team member to take them.
* Set-up one-on-one meetings so that the new hire meets with each new colleague throughout their first week. Explain to the new hire that they will be meeting with colleagues one-on-one to get to know each other, explain roles, to give personal contact info and answer questions.
* Introduce the new hire to their assigned “Onboarding Partner” (see the Onboarding Partner Program overview). Explain to the new hire the focus of the the Onboarding Partner Program.

If possible, the new hire’s immediate supervisor should be present on the first day. It is very important for the new hire’s immediate supervisor to be present and visible on the new hire’s first day to make the interpersonal connection. Week 1- Important Steps to Take Within the First Week**The Basics:*** Check in regularly with the new employee. It is imperative for a leader to be visible within the first few weeks as the new hire is seeking validation that their decision to join PHN was the right one. These can be casual check-in to say hello, coffee break etc.
* Review the any topics/policies to ensure understanding, answer any questions and explain how each policy is observed within your department’s work/team:
	+ - Conflict of interest
		- Respect in the workplace
		- Punctuality and absenteeism
		- Scheduling vacation and personal time
		- Ultipro and time management
		- Confidentiality & Protected Health Information (PHI)
		- Introductory period
		- Standards of conduct
		- IT policies – password protection
* Introduce the new hire to any additional people he or she will be working with—inside and outside of the organization.

**Job Description Review:*** Review the new hire’s job description. Define the job accurately and completely, and be sure they understand their responsibilities. Although the new hire has seen their job description, it is a very good idea to review it in detail. This is a good time to offer a deeper insight to the role. i.e., “what does it *really* mean and how does their position impact others? “
* Ensure that performance standards are clear, and let the new hire know how their performance will be measured. Discuss the introductory review timing.
* Provide immediate feedback on how the new hire is doing: Be observant, so you can “catch” the new hire doing something right and comment on it, specifically! Positive feedback is a very powerful tool to motivate and reinforce; it trains the new hire to give you *more* of the behavior you’re looking for.

**First Assignment:*** Assign the new hire manageable task within the first week to ensure the new hire is not left idle when there are gaps in their orientation/training agenda schedule. Make the job as manageable as possible, and make conditions as predictable and as controllable as you can, until the new hire gets the rhythm of his or her work within the company. Be prepared to help the new hire sort priorities, at first.

**Leadership and Culture:*** Help the new hire understand the company’s unique culture. What’s the dress code? When and how do people take lunch and other breaks? When and how do they get together to meet or solve problems? How involved are new hires in company-wide events (fundraisers, volunteer events, employee events etc.)? The Onboarding Partner can assist here.
* Remember you play a key role for inspiring great performance in your new hires as you are for getting them oriented to the company and performing well in their role. It is important to explain to the new hire your leadership role in the department and at the company at large. Be sure to provide the new hire with the big picture and tie-in why the new hire’s work is so important.
* Explain how the Education & Training deparment will be available to assit them with receiving both systems training and soft skill development. Explain how this ties in with the internal department and department specific training.
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## 30-Day

* Check-in weekly, continue to acknowledge success, and provide constructive feedback when needed.
* Establish performance goals and set a date/time to review them with new hire.
* Continue to create opportunities for the new hire to partake in departmental activities, such as department luncheons, team outings, birthday celebrations. Also, encourage the hire to participate in any schedule organizational events (i.e., Employee Appreciation Party, Halloween Celebration, Employee Picnic, Thanksgiving Luncheon, etc.)
* Inform the new hire that the Education and Training Department will send the first “Pulse Check-In” survey to employees on their one month anniversary. Remind them to complete the survey.

## 60-Day

* Start a schedule for one-on-one meetings that fits the needs of you and your employee.
* Continue to check-in weekly/bi-monthly.
* Develop an action plan to accomplish performance goals.
* Ask new hires about learning and professional development opportunities that may be of interest to them. Discuss which ones are appropriate.

## 90 Days to 1 Year

* Track the status of goals and make changes as needed.
* Continue to check-in during one-on-one meetings to set goals, review performance, and give feedback. Also, ask for feedback about how things are going and if they’re getting the support they need from you and others.
* Ask new hires about learning and professional development opportunities that may be of interest to them. Discuss which ones are appropriate.
* Remind the new hire that the Education and Training Department will send last “Pulse Check-In” survey to employees at their 90-day anniversary. Remind them to complete the survey.
* Complete the 90-day review with new hire and forward to HR.
* Track the status of goals and make changes as needed.

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**NEW EMPLOYEE ANNOUNCEMENT TEMPLATE**

**TO:**

**FROM:**

**DATE:**

**RE:** **New Employee Announcement**

I am pleased to announce that [*new employee’s name*] will be joining our department as [*job title of new employee*] on [*start date*].

[*Onboarding Partner’s name*] will be assigned as the Onboarding Partner to help [*new employee’s first name*] during [*his/her*] initial weeks and months with us. However, all of us will be responsible for helping [*new employee’s first name*] become a productive member of our team.

Please join me in extending a warm welcome to [*new employee’s first name*] on [*his/her*] first day.

Warm Regards,

[*Hiring Manager Name*]

Please feel free to add any additional key information to the email. For example, including a brief bio on the new hire that summarizes their experience may be helpful.

## SAMPLE CHECK-IN MEETING QUESTIONS FOR LEADERS

The following are sample check-in questions you can ask the new hire during check-ins and one-on-ones to determine how the new hire is progressing and to determine if they require any additional support.

1. How is your job going?
2. Is your job and our company what you expected when you were hired?
3. Any surprises? If yes, what were they?
4. Has training been helpful?
5. What training would you add?
6. Do you need more training in any area?
7. Has your Onboarding Partner been helpful and meeting your needs?
8. Can you suggest any changes for the Onboarding Partner program?
9. Do you have all the equipment and/or work tools you need?
10. Do you know where you stand in terms of your progress since you started working?
11. How are your relationships with your co-workers?
12. Are you getting the support you need from your teammates?
13. Do you have suggestions on how we could improve our work across locations?
14. Are there any questions you still have? Is anything still unclear?
15. Is there something we should be providing to new hires that we have missed?
16. Do you feel out of the loop about anything?
17. Do you have any general suggestions?
18. Do you have any general work needs that haven’t been met?
19. Is there anything you would like to tell me that I have not asked you?
20. Discuss any issues brought up in previous meetings to determine resolution.

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