Introduction

The average person changes jobs 10 times in 20 years, and each year more than 25 percent of the U.S. population is experiencing a new job transition. Unfortunately, many transitions are not successful. In all state agencies, nearly half of new employees leave their jobs in the first year. Clearly, there is room for improvement.

An important way managers can combat this challenge is to use best practices for employee onboarding. Onboarding helps new employees adjust to the social and performance aspects of their jobs so they can quickly become productive, contributing members of their agency. This *Onboarding Guide* provides recommendations and tools to help managers effectively onboard new employees.

> Onboarding is the process of helping new hires quickly adjust to the social and performance aspects of their new jobs.

Importance of Onboarding

Academic researchers have carefully studied onboarding, which they refer to as "organizational socialization," and the potential outcomes. Onboarding is important because ***the faster new hires feel welcome and prepared for their jobs, the faster they will be able to successfully contribute to the organization's mission***.

When done right, onboarding can lead to:

1) **Increased job satisfaction** by jumpstarting relationships
2) **Increased job performance** by clarifying expectations
3) **Increased organizational commitment** by feeling supported and having social needs met
4) **Increased retention** by providing support through feedback
5) **Less stress** by aiding quick adjustment to the culture

Research has led to several best practices which will be explained in this guide. First and foremost, it has been clearly shown that formal onboarding practices—i.e., planned-out steps to ensure all important aspects are covered—are more effective than informal onboarding practices.

There are four levels to onboarding, with each higher level adding a new component:

Levels of Onboarding	
Level 1	**Policies**—informing employees about policies and procedures, along with general work-related information (e.g., benefits, breaks, schedule). This is commonly referred to as "orientation."
Level 2	**Role Clarification**—ensuring employees clearly understand their new duties and related expectations.
Level 3	**Relationships**—helping employees establish relationships and vital information networks.
Level 4	**Culture**—providing employees with information about formal and informal organizational norms.

Unfortunately, many programs and managers stop at level 1 or 2, and even then, only provide minimal role clarification. But managers who reach level 4 can reap the positive outcomes of effective onboarding. To reach this level, four objectives, outlined in the next section, must be addressed.

Objectives of Effective Onboarding

1. **Increase Employee Self-Confidence**
   The degree to which a new employee feels confident in doing the job well, he or she will be more motivated and eventually more successful than less confident counterparts. Managers can boost employees' confidence through onboarding. Self-confidence has been shown to impact organizational commitment, job satisfaction, and retention.

2. **Increase Role Clarity**
   Job performance improves when employees have a clear understanding of their roles and expectations. Role clarity is a good indication of how well-adjusted a new employee is and measuring role clarity can help managers stop potential performance problems before they get worse, leading to poor job attitudes. Role clarity is one of the most consistent predictors of job satisfaction and commitment during the onboarding process.

3. **Increase Job Culture Knowledge**
   Because every organization has a unique culture, helping new employees navigate that culture is essential. Culture includes such things such as values, goals, internal politics, the organization's unique language, and unwritten expectations. Adjusting to the organization's culture is associated with commitment, satisfaction, and retention.

4. **Increase Social Integration**
   Meeting and starting to work with organizational "insiders" is an important aspect of learning about an organization. In addition, new employees need to feel socially comfortable and accepted by their peers and superiors. Acceptance by peers has been shown to be a clear indicator of adjustment and is one of the biggest reasons for failure to onboard successfully.

Best Practices			
1. Self-Confidence	2. Role Clarity	3. Cultural Immersion	4. Social Integration
• Provide "real" work on day one and structure assignments to ensure early successes. • Provide regular encouragement and performance feedback to build self-confidence.	• Thoroughly discuss job duties and performance expectations using the job description; ensure that it is thorough and up-to-date. • Address potential performance problems early to prevent them from getting worse.	• Describe the "how work is done here" regarding relationships within your agency, division, team, and one-on-one interactions. • Assign a mentor; mentors help new employees learn and internalize values and adapt to the culture.	• Create support networks and train supervisors and mentors to effectively provide emotional support. • Provide opportunities for relationship building by inviting the new employee to meetings and other team-oriented events.

The Onboarding Model

Effective Onboarding →

Meeting Objectives
- ✓ Increased Self-Confidence
- ✓ Increased Role Clarity
- ✓ Increased Job Culture Knowledge
- ✓ Increased Social Integration

→

Improved Outcomes
- ✓ Increased Performance
- ✓ Increased Job Satisfaction
- ✓ Increased Commitment
- ✓ Reduced Stress
- ✓ Increased Retention

The following pages outline recommended actions and additional detail on best practices for each stage of the onboarding process.

Checklists of Actions & Best Practices

Before the First Day

- [ ] Initial Phone call. After the selected individual has accepted offer, make a personal phone call to answer any immediate questions. Clarify when and where to show up on the first day, where to park, who to report to, what to wear, what will happen for lunch, and what documents to bring (e.g., driver's license and social security card). If the individual is new to the area, provide community information (e.g. maps, housing, and business/school information).

- [ ] Notify HR. Notify HR Specialist and/or appropriate agency staff member with the new employee's name, title, and telephone number to update phone list, organizational chart, and email distribution lists.

- [ ] Collect Documents. Collect documents and forms to give to new employee upon arrival.
  - ✓ CPC documents
  - ✓ Organizational chart
  - ✓ Employee handbook
  - ✓ HR forms (BHR will send to you)

- [ ] Orientation or "Welcome" Packets. Complete assembly of your agency's Welcome Packet. Ensure it includes a personally-signed welcome letter from the agency or division head. Ideally, mail the packet to the individual two weeks before the start date. Also, ensure you receive a BHR Packet from HR.

- [ ] Notifications. Notify everyone in your unit that a new person is starting and what the person's job will be. Send an email to appropriate work group to announce the arrival of new the employee. Be sure to copy the new employee's personal email address so he/she sees what others have seen.

- [ ] Welcome Activities. Plan any welcome activities and ask other staff members to welcome the new employee. Encourage them to provide support.

- [ ] Meetings with Leadership. Plan meetings with division director or agency head if possible.

- [ ] Meetings with Key Staff. Put together a list of key people the employee should meet to get a broader understanding of their roles and schedule meetings with key personnel and the new employee (i.e., other programs).

- [ ] Accommodations. If new employee has requested accommodations, be sure to have those in place prior to the first day.

- [ ] Prepare Workspace. Make sure the employee's workspace is set up and waiting for their arrival. A clean workplace stocked with materials and supplies and possibly a nameplate and treats will go a long way in making the employee feel welcome. If working remotely, ensure you have supplies and equipment ready to send home with them.

- [ ] Identify Mentor. Identify an ideal staff member to serve as a mentor for the first month or so.

- [ ] Share Legacy Documents. When possible, share information on how prior incumbents performed their tasks and whom they contacted to assist in getting their work done

- [ ] Email and Phone. Notify BIT (or others) to get email, computer, printer, phone number, and voicemail set-up. Contact appropriate staff to have the employee added to the appropriate email distribution lists.

- [ ] Miscellaneous Arrangements. If applicable, arrange for and obtain building pass, nameplate, office keys, and business cards.

- [ ] Technological Resources. Collect information on technological resources such as instructions for voicemail and phone set up, important files, books, reference materials, agency website and intranet addresses; provide information about network drives and files.

- [ ] Plan Schedule. Ensure that you will be in the office and adequately available for the new employee during their first day (and week, if possible).

The First Days

- ❑ **One-on-one meeting.** Meet with employee to welcome to the agency. Explain the order of events for the day.

- ❑ **Introductions.** Explain the org chart (photo org charts are ideal) and then introduce the employee to leadership, coworkers, and other key staff.

  Tip: Avoid doing all introductions at once which can be overwhelming and makes it more difficult to recall names and faces.

- ❑ **Performance Expectations.** Review performance expectations using the job description and other supporting documents. Describe how the job fits in with the work group, department, and state government.

- ❑ **Initial Assignment.** Provide initial assignment(s) and provide detail instruction and training if necessary. Discuss lines of communication and communication styles. Try to assign "real" work on the first day to keep the employee interested (don't ask them to study policies all day), and ideally provide assignments that will ensure early successes in order to build self-confidence.

- ❑ **Schedule.** Clarify the schedule of the first week.

- ❑ **Training.** Confirm required and recommended training.

- ❑ **Debriefings.** Debrief with employee after initial meetings/trainings/assignments. Touch base quickly and frequently to provide support and stay connected.

- ❑ **Payroll.** Describe the payroll system (e.g., how time is tracked, pay stubs are delivered, and pay is deposited).

- ❑ **Orientation Packets.** Give the BHR Packet (and agency's Welcome Packet, if not already mailed) to the employee and explain the contents.

- ❑ **Required Forms.** Distribute and discuss required HR paperwork and any other forms required by your agency. Ensure the employee has completed their on-line orientation forms.

- ❑ **Key Distribution.** Distribute keys, access cards, etc.

- ❑ **Tour.** Tour facility and explain facility map. Your objective during the tour is to develop a feeling of being a part of a team. Tour may include:

  - ✓ Employee's work area
  - ✓ Co-worker/receptionist area
  - ✓ Other program areas
  - ✓ Restrooms
  - ✓ Mailroom
  - ✓ Break area/Cafeteria
  - ✓ Vending
  - ✓ Conference rooms
  - ✓ Copy/fax machines
  - ✓ Parking lots
  - ✓ Supply area
  - ✓ Files
  - ✓ Storage
  - ✓ Building security
  - ✓ Fire exits

- ❑ **Daily Check-up.** Check in with employee at the end of day. It is important to make yourself available the first day.

The First Week

- ❑ Explain Performance Appraisals. Review [CPC Employee FAQ] and take time to explain when and how performance will be evaluated on check-in forms.
- ❑ Daily Check-ups. Meet with the employee at least once daily during the first week to check up on how things are going.
- ❑ Benefits Deadline Reminder. Remind employee of deadlines for benefits enrollment.

Months 1 - 2

- ❑ Ongoing Debriefings. Continue to debrief training sessions, meetings with key contacts, and other events the employee attends.
- ❑ Frequent Feedback. Establish goals and provide regular, informal feedback during this time by having frequent discussions about assignments, productivity, and comfort level.
- ❑ Meeting Schedule. Schedule or oversee scheduling of meetings with key people with whom the employee will have frequent interaction.
- ❑ Work Culture. Provide additional contextual information about the work group and department to increase the understanding of the purpose, value added, goals, and initiatives.

By end of Month 5

- ❑ Required Training. Ensure required training is completed. If the new employee is a supervisor, schedule mandatory BHR trainings.
- ❑ Regular Feedback. Continue providing regular informal feedback.
- ❑ Key Policies. Point the employee to key policy documents as needed. Employees can relate to policies better after being on the job for a few months.
- ❑ Work Flexibility. Discuss flexible work options that could increase the employee's effectiveness and efficiency.
- ❑ Development. Provide information on continued learning opportunities within the agency.

By end of Month 12

- ❑ Completion of Probation. When off-probation, congratulate the employee on successful completion of probationary period and inform him/her of pay increase (if applicable).
- ❑ Recognition. Celebrate successes with recognition of contributions.
- ❑ Analyze Working Relationship. Clarify or discuss aspects of working together:
    - ✓ Is the job what was expected?
    - ✓ Are there enough opportunities to learn?
    - ✓ What are the hindrances to the job?
    - ✓ What suggestions are there for improvements?
    - ✓ Does the employee sense recognition?
- ❑ Ongoing Feedback. Continue to provide regular informal feedback.
- ❑ Evaluate Mentor Relationship. If a buddy/mentor was assigned, meet with mentor and new employee to discuss onboarding successes and areas for improvement.
- ❑ Annual CPC Check In. Ensure two CPC check-ins have been completed in the past 12 months.
- ❑ Career Development Planning. Ask if interested in planning for career development and begin if ready.

Suggested Contents of Agency Welcome Packet

- ❑ Welcome letter from the agency head
- ❑ Agency strategic plan overview
- ❑ Agency org chart
- ❑ Phone list
- ❑ Map of facility and/or floor plan with seating chart
- ❑ Emergency evacuation procedures
- ❑ List of common agency acronyms
- ❑ List with links to frequently used forms
- ❑ CPC Employee FAQ
- ❑ New Employee Acknowledgement Checklist
- ❑ Privacy Program Statement of Understanding (HIPAA)
- ❑ Equipment Cars/Keys Issued Checklist
- ❑ Other agency policies/procedures and required forms for all employees

Contents of BHR Packet or BHR On-line Orientation

NOTE: Check with your agency's Human Resource Specialist for the most current contents.

- ❑ BHR Employee Handbook
- ❑ Health, Flexible Benefits and Life Coverage
- ❑ Employee/Manager Self-Service HR Portal Instructions
- ❑ Employee Assistance Program materials
- ❑ Worker's Compensation Brochure
- ❑ SDRS Deferred Compensation Enrollment Guide
- ❑ Long Term Care Insurance Brochure
- ❑ State Library Flyer
- ❑ Veterans Flyer

BHR Forms to be Returned (or Completed On-line) by Day 1

NOTE: Check with your agency's Human Resource Specialist for the most current requirements.

- ❑ I-9
- ❑ W4
- ❑ Payroll Form
- ❑ Direct Deposit
- ❑ Restrictions on Public Employment
- ❑ Employment Acknowledgement
- ❑ SDRS Form E-1
- ❑ SDRS Form E-5
- ❑ Any required agency forms