ESI GROUP

TotalCare EAP
Public Safety EAP
Educators' EAP
Higher Ed EAP
HealthCare EAP
Union AP

Onboarding Best Practices – First Steps

Onboarding a new employee properly is critical to their success and longevity in your organization. Research shows that an effective program for onboarding will dramatically improve the potential performance, satisfaction and commitment of your new employee. The initial experience that a new hire has with your organization and the opinions that they form at the outset will set the stage for their future performance and engagement. It's up to you to ensure that they start on a positive rather than a negative trajectory.

Getting Started – The onboarding process focuses on the new employee and their first few weeks or months in your organization, but it should start well before their first day. There are important tasks that should be addressed to ensure that their early days are positive and productive.

- ✓ **Employee Handbook** - As a business, you should have an employee handbook that clearly outlines the structure, rules and norms of your organization. In addition to all the rules, the handbook should address the culture and core values that define your organization. This should be a living document with a digital origin. On day one, the document should be printed, dated, signed and given to the new employee. A digital copy should be available to reference going forward on your organization's intranet or local machine.

- ✓ **Paper work packet** – Having all the paperwork for a new employee organized and ready so that it can be completed either before or on the first day is a necessary step. Tax documents, direct deposit forms, 401k, insurance, username/password forms, and anything else that is needed when a new person joins your organization should be included. Scrambling for this on the employee's first day and possibly forgetting something does not create a good first impression.

- ✓ **Job description** – Have a clear understanding of the position being filled, know the duties, responsibilities and essential functions that the new hire will be accountable for. Have these written out in clear terms, both in digital and physical copies.

- ✓ **Prepare the managers** – Ensure that any managers who will interact with the new hire are prepared for the new member. They should understand the job duties and the onboarding process. The new hire's direct supervisor should be given a checklist and structure for the onboarding process. The checklist should include a timeline with established milestones to verify the new hire is adapting to their role in the organization.

- ✓ **Personnel file** – HR should have the personnel file created and ready to go on day one. It should be a comprehensive collection of documents that includes everything from important tax documentation to medical requirements and reviews.

ESI GROUP

TotalCare EAP
Public Safety EAP
Educators' EAP
Higher Ed EAP
HealthCare EAP
Union AP

✅ **Day One plan** – Have a checklist or agenda outlining the schedule and what the new hire should expect on day one and get this to them in advance. Let them know what paperwork will be filled out, what activities will be completed, the timeline of the day and when lunch and breaks will occur. (If possible, have paperwork filled out electronically before the first day). Tell the employee if they need to bring anything with them, what the dress code is, where to park, what time to be there and where to go when they arrive. Starting a new job is a time of uncertainty and having structure on day one with clear expectations will give your new hire a more stable start and a higher chance at success. Anticipating their needs and questions will minimize their stress and show that you care about them.

Day One – An employee's first day with your organization is a big deal. They will form long lasting impressions of how your organization works, meet more new people than they can possibly remember and fill out a mountain of paperwork. There are hurdles and complications to this but remember it's meant to be a good day: you are welcoming a new member to your team. There are key steps to complete on their first day to help encourage success.

✅ **Welcome** – Make it a priority to meet and greet your new hire when they arrive. If you absolutely cannot be there, assign someone and ensure they understand the importance of this responsibility. Give a tour and show the new person to the location they will be working or to the location where they will meet with their manager or HR. Avoid letting people wander and figure things out on their own.

✅ **Mission and purpose -** An important part of bonding with an organization is understanding the purpose, mission and goals. People want to belong to organizations they admire. Engender pride of association early by promoting organizational values and achievements.

✅ **Introductions** – Studies have shown that a working relationship with peers improves engagement and performance. Introduce the new person to your employees, give brief descriptions of job duties and responsibilities. This will be a bit of an information overload for some but keep the mood relaxed and casual. Don't expect people to remember names, it's more about encouraging the social aspect of the workplace.

✅ **Balance the time** – There will invariably be more paperwork to fill out but try and balance the day so that it is split between the monotony of signing documents with more engaging activities like meeting coworkers, touring the facility, and getting hands-on with the work.

TotalCare EAP
Public Safety EAP
Educators' EAP
Higher Ed EAP
HealthCare EAP
Union AP

Assign a mentor – In addition to having a manager, studies show that having a mentor or assigned co-worker helps new employees to grasp the role and engage in the organization quickly. This person should be someone who the new hire can to turn to for quick questions, someone who has walked a similar path. Mentors provide a more informal method of introducing new hires to peers. New employees may feel more comfortable asking a peer a question regarding culture or performance than a manager.

Intro Packet – Make sure the new employee has a copy of the handbook, their day-one expectations document, information about available benefits, and any paperwork or forms they may need to smooth their transition (direct deposit forms, a map of the building, parking restrictions etc.…)

Announcement to the organization – Recognize the new employee as a valued addition. Send out an all-staff email, post it in a newsletter, and introduce the new team member at a meeting. Talk about who the new person is, what they bring to the job and what role they will fill. Consider sending the announcement before you take the new person on a tour so that coworkers will have some familiarity with the person when they are introduced.

Talk about expectations – Be clear and straight forward about what expectations the organization has for the new employee. They should understand what is expected of them and know how to achieve these goals. Answer questions and explain any unwritten rules. Ambiguity is the enemy of successful onboarding.

Talk about the timeline – The onboarding process is not over on day one. Set up a timeline of success, with measured steps and clear goals. The traditional 90-day period is fine, but you may have more success by breaking it into three 30-day periods. Set short term and long term goals. Cover things as simple as grasping the tools of the job, the programs or machines needed to perform the function of the job; and things as complicated as completing their first project. It is important to be consistent and to follow up at intervals with the new member to track progress and discuss hurdles.

Functional and supplied workstation - Have the user workstation ready to go. This may include setting up usernames and passwords for your organization's systems, a clean desk, a working computer and phone, office supplies, security clearance, email and shared folders. This will vary based upon industry. Essentially, it means having the proper set up and necessary tools for that person to do their job.