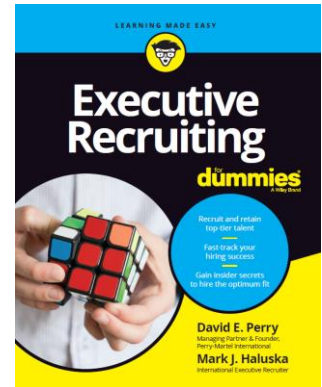


# On boarding Process Cheat Sheet

When a new employee starts their new position, it is essential that you offer a welcoming work environment with informed colleagues and a fully-equipped work space; helping to ensure that the new employees feel “settled in” on their first day.

Keep in mind that onboarding does not end on the new employees first day or so on the job. It really should be a yearlong process. Below is a guide that will help you establish an effective onboarding process:



## Schedule and Job Duties

### Call employee:

- Confirm receipt of letter from HRO.
- Remind employee to complete tasks in the New Hire Activities application.
- Confirm start date, time, place, parking, dress code, etc.
- Identify computer needs and requirements.
- Provide name of their onboarding partner.
  - Add regularly scheduled meetings (e.g. staff and department) to employee’s calendar.
  - Prepare employee’s calendar for the first two weeks.
  - Plan the employee’s first assignment.

### Socialization

- Email department/team/functional area of the new hire. Include start date, employee’s role, and bio. Copy the new employee, if appropriate. Set up meetings with critical people for the employee’s first few weeks.
- Arrange for lunch with the appropriate person(s) or buddy for the first day and during first week.
- Select the buddy.
- Meet with the buddy, and provide suggestions and tips.
- Arrange for a company tour.

### Work Environment

- Put together welcome packet from the department and include: job description, welcome letter, contact names and phone lists, parking and transportation information, mission and values of the company.
- Clean the work area, and set up cube/office space with supplies.

- Order office or work area keys.
- Order business cards and name plate as appropriate.
- Arrange for parking, if needed.
- Add employee to relevant email lists.

### Technology Access and Related

- Order technology equipment (computer, printer, iPad) and software.
- Contact local IT and/or IS&T to have the system set up in advance as well as employee password(s).
- Arrange for access to common drives, and coordinate SAP roles authorizations.
- Arrange for phone installation.

### Training/Development

- Remind employee to sign up for a New Employee Orientation session.
- Arrange pertinent trainings required for the job.

## FIRST THREE MONTHS

Outcomes: *Employee is becoming fully aware of his/her role and responsibilities, beginning to work independently and produce meaningful work. He/she continues to feel acclimated to the environment, both functionally and socially.*

### Schedule, Job Duties, and Expectations

- Continue having regularly occurring one-on-one meetings.
- Meet for informal three-month performance check-in.
- Continue giving employee assignments that are challenging yet doable.
- Create written performance goals and professional development goals.
- Discuss appropriate flexible work options.

### Socialization

- Have employee “shadow” you at meetings to get exposure to others and learn more about the department and organization.
- Have a check-in with the employee and buddy.
- Take employee out to lunch, and have informal conversation about how things are going.

### Training and Development

- Ensure employee attended a New Employee Orientation session. Request the employee provide feedback on the session and share as appropriate.
- Ask if needed training is completed.
- Provide information about continued learning opportunities including tuition assistance, etc. offered by Human Resources.

## FIRST SIX MONTHS

*Outcomes: Employee has gained momentum in producing deliverables, has begun to take the lead on some initiatives, and has built some relationships with peers as go-to partners. Employee feels confident and is engaged in new role while continuing to learn.*

### Schedule, Job Duties, and Expectations

- Conduct six-month performance review.
- Review progress on performance goals and professional development goals.

### Socialization

- Create an opportunity for employee to attend or be involved in an activity outside of his/her work area.
- Invite employee to company events (such as awards dinners, holiday parties, company picnic, etc).
- Meet with employee and buddy at the end of their structured buddy-relationship. Discuss how things went and what else would be helpful for the employee.

*Outcomes: Employee is fully engaged in new role – applies skills and knowledge, makes sound decisions, contributes to team goals, understands how his/her assignments affect others in the organization, and develops effective working relationships. He/she has a strong understanding of the company's mission and culture. Employee continues to be engaged in his/her role and has gained greater confidence in position; begins to take on additional assignments and works with some level of autonomy.*

### Schedule, Job Duties, and Expectations

- Celebrate successes and recognition of employee's contributions.
- Continue providing regular informal feedback; provide formal feedback during the annual review process.
- Have a conversation with employee about his/her employment experience to date:
  - Extent to which employee's expectations of role align with reality.
  - Extent employee's skills and knowledge are being utilized and ways to better utilize them; what's working, what they need more of, etc.
  - Begin discussing the year ahead.

### Socialization

- Solicit employee's feedback and suggestions on ways to improve the onboarding experience. Do this one-on-one or with a small group of new employees.

### Training and Development

- Discuss employee's professional development goals and identify relevant learning opportunities.