

HIRING MANAGER ONBOARDING GUIDE



Helping a new employee feel comfortable and welcome not only on the first day, but also through the first three - five months of their employment, is one of the keys to a successful onboarding program. Your role in informing the employee about his or her job responsibilities, policies, procedures, and your department’s mission and goals is extremely important. The way in which you present the information will make a lasting impression on the new employee. The information contained in this guide, along with the employee checklists and templates, is simply a blueprint for onboarding. This guide is intended to provide you with useful information to assist you in ensuring a smooth transition for the new employee. Please work with your Human Resources Representative to adapt the information in this guide to fit your own particular situation and training needs. Also, do not hesitate to call on others to make the onboarding experience rewarding for your new employee.

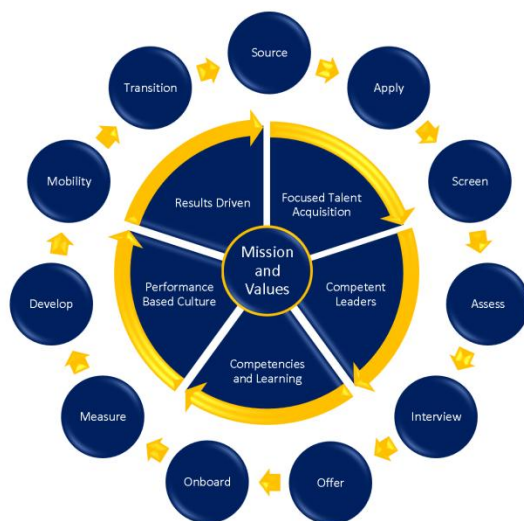
WHAT IS THE DIFFERENCE BETWEEN ORIENTATION AND ONBOARDING?

Many organizations focus on the new employee’s first day. This first day, during which the new employee typically completes forms and learns about benefits, is commonly called *orientation* and represents a “transactional” approach to bringing on new employees. This orientation is viewed as a discrete, stand-alone event, not integrated with other first-year experiences for new employees. In contrast, high-performing organizations use a more comprehensive strategic approach to bringing on new employees called “onboarding.”

- **Onboarding is the strategic process of assimilating new employees into the organization’s culture and advancing them to the desired level of productivity as quickly as possible.**

Orientation
<ul style="list-style-type: none"> •Is typically a one day event •Focuses on the organization's structure, mission, and policies •Includes a review of the Employee Handbook •Completion of payroll and benefits paperwork •Other administrative issues

Onboarding
<ul style="list-style-type: none"> •Extends well beyond the first few days •Is a systematic process •Can last for 3-18 months depending on the position •Cultivates long-term relationship building and access to information •Promotes a better understanding of culture, mission, and goals •Fosters a feeling of belonging and affirmation of making a right choice •Reduces the time it takes to "hit the ground running"



Employee Life Cycle
Figure 1.0

Onboarding is one of multiple stages of an Employee Life Cycle (see Figure 1.0). Each of these stages must be planned and executed carefully to optimize our employees’ engagement, satisfaction, productivity and performance. Lack of focus or advanced planning during the onboarding phase can be a barrier to success for the new employee and ultimately becomes a barrier to success for you and the organization. Once we have recruited and hired the best talent for the job, onboarding serves as a critical second step to ensure that our new employees connect with and effectively contribute to the mission as quickly as possible.

WHY IS IT IMPORTANT TO ME?

Statistics show that employees are most vulnerable to leave an organization within the first 18 months of employment. Making a good impression is paramount! A structured onboarding process directly increases employee engagement, performance and retention. Research clearly shows that effective onboarding positively impacts a variety of areas, ultimately leading to your success as a leader and to the agency's overall success (see Figure 2.0).

Definition Of Maturity Class	Mean Class Performance
Best-in-Class: Top 20% of aggregate performance scorers related to their onboarding process	<ul style="list-style-type: none"> • 31% year-over-year increase in retention rate of new employees • 31% year-over-year improvement in new employee engagement • 24% year-over-year decrease in time-to-productivity for new employees • 12% year-over-year decrease in cost per employee for onboarding

Figure 2.0
 *Source Aberdeen Group, 2009

WHO IS RESPONSIBLE?

Successful onboarding is a collaborative effort across the entire agency (see Figure 3.0, callout 1). Each division, department, director, manager and employee has a responsibility to ensure that our new employees' first days, weeks, and months on the job provide a successful beginning to their careers. It is critically important that we provide them with the foundation, tools, resources, and organizational perspective that ensure their rapid integration within our workforce and our culture. The goal of this partnership is to establish a long-term relationship with the employee that begins even before the employee is hired.

- **Process Owners** – Process owners are accountable for helping to execute the mechanical aspects of onboarding while coordinating with coworkers from other departments such as: Human Resources, Information Technology, Employee Development, etc.
 - **HR plays a key role in the early talent acquisition and orientation phase and in guiding the onboarding process; however, the hiring manager must be proactive and engaged in facilitating the employee's successful integration into the organization over time.**
- **Process Champions** – Process champions are responsible for motivating the new employee and helping them understand how their job is critical to the fulfillment of our mission, vision and values. Process champions include: senior leadership, directors, managers, and mentors.
- **Employees** – New employees are responsible for being active participants in their own onboarding. We provide information, resources and equipment; the new employee is engaged and ready to embrace new ways of doing work and adapt to new office norms and work styles. New employees must complete all required paperwork, attend any required training, and work proactively to develop relationships and seek the resources and information they need to do their jobs.



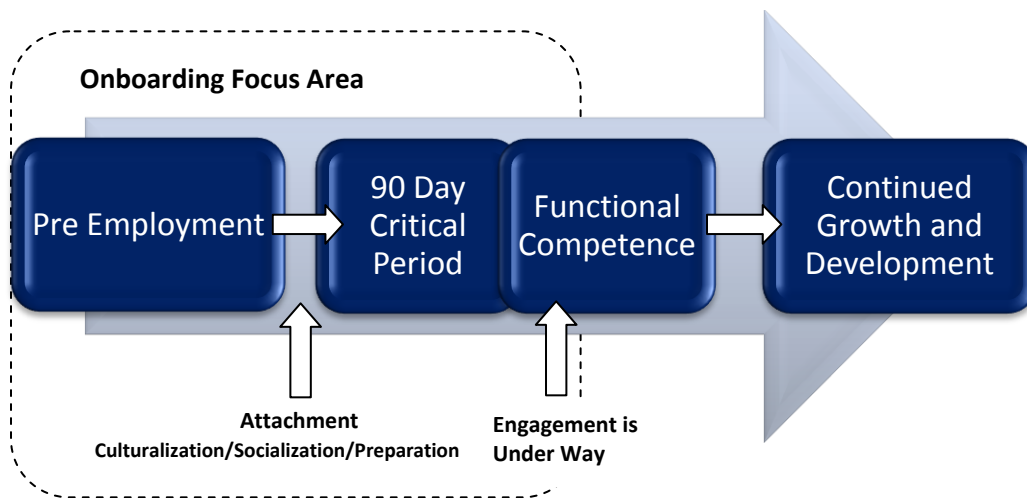
Figure 3.0
 *Source: Booz/Allen/Hamilton, May 2008

HOW LONG DOES ONBOARDING LAST?

The employee's need for onboarding does not end in the first days of employment. Thus, the onboarding process consists of five phases beginning when the employee accepts the job offer and continuing through his/her first year of employment (see Figure 3.0, callout 2). The five phases vary in length yet represent critical steps an employee experiences during his/her onboarding experience.

WHERE ARE WE GOING TO FOCUS?

Research shows an alarming failure rate of new employees in the first 100 days of employment. This failure rate cuts across industries and across companies of all sizes. Because of this, we are going to focus heavily on the "First 90 Days." During this time we want to attach them to our organization through preparation, culturalization and socialization which will ultimately drive them to maximum levels of engagement and decrease the time to productivity.



WHAT ARE THE HIGH LEVEL RESPONSIBILITIES?

As the hiring manager, it is important that you reach out for assistance before the new employee starts so you can thoroughly plan the onboarding process and ensure success.

Manager

The manager's importance in onboarding cannot be overstated. All managers should:

- Welcome new employees.
- Schedule new employees for orientation on the first day of employment.
- Meet with new employees within a week after orientation activities are completed.
- Communicate job responsibilities.
- Explain and set cultural expectations (e.g., when to "cc" the manager on e-mails, what decisions can be made without manager approval, communication styles).
- Review the organization's performance management system and process with the new employee.
- Develop a work profile that sets performance expectations (S.M.A.R.T. goals).
- Assign meaningful work.
- Discuss career development.
- Monitor performance and provide formal and informal feedback throughout the employee's first year.

Mentor

In addition to training from the manager, the new employee may be paired with another veteran employee. This person should be a superior performer and have good people skills. An element of the mentor's responsibility is to help establish a sense of belonging for the new employee. Part of this role is to allow for a comfortable, more informal environment in which the employee can ask questions and receive information about the agency. The mentor knows the ropes, so to speak, and can be an effective source of advice and encouragement. The mentor can offer seasoned

experience in the form of training and socializing the new employee to the work place. An element of the mentor's responsibility is to help establish a sense of belonging for the new employee. With an effective mentor, a new employee will quickly become a contributing member to your department.

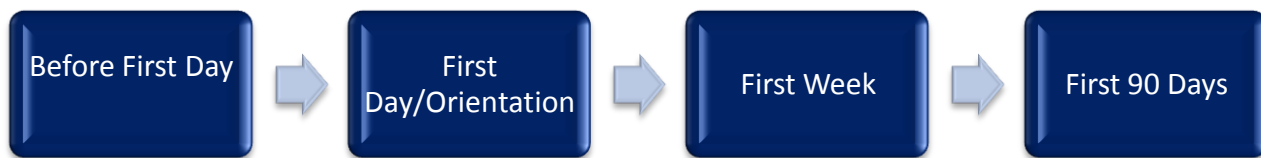
Mentors are generally peers who are matched with new employees to help them:

- Feel welcome and reaffirm the new employee's decision to join state government.
- Understand the written and unwritten elements of the organizational culture.
- Learn how to navigate the organization.
- Meet colleagues and other essential staff.
- Answer any questions and connect them to the right people.
- Identify useful new employee resources (e.g., intranet sites, points of contact, information).

Selection of a Mentor

- Demonstrates high performance.
- Is accessible to the new employee.
- Is proud of the organization.
- Is a peer of the new employee.
- Exhibits patience, good communication skills and good interpersonal skills.
- Is a positive role model (well regarded and accepted by current employees).
- Preferably, has been employed more than one year.

WHAT ARE THE KEY ACTIVITIES?



The first phase of the onboarding process is the time after the employee accepts the job and before the first day of employment. During this time, the Human Resources Representative notifies other process owners, sends paperwork and communicates logistical information. Agencies should use this time to begin communicating with the new employee, rather than waiting until the first day, in order to provide a smoother transition.

Managers should complete the following activities before a new employee's first day:

- Send the new employee a welcome packet or card signed by the team. The packet should express excitement that the new employee will be joining the agency. You can even include the agenda for the first week.
- Provide the new employee with information about the agency and his/her job.
- Work with your Human Resources Representative to arrange for, and encourage, paperwork to be completed and reviewed prior to the first day.
- Contact the new employee to answer questions and set expectations for the first day.
- Assign a Mentor to answer the new employee's questions.
- Ensure that the new employee's workspace is assigned and supplies are ready upon arrival.
- Ensure that "office essentials" (e.g., computer, phone, e-mail and other relevant accounts) are in place on the first day by coordinating with other responsible team members.

Make the First Day a Compelling and Valuable Experience

Since orientation day may be the first substantive encounter for a new employee with our organization, it is a critical part of the overall onboarding process and sets the tone of that employee's first impression. Generally, the hiring manager will welcome the new employee for orientation on Day 1 and ensure that orientation covers the following required activities.

On the employee's first day, the HR Department will:

- Have a senior leader welcome new employee (in person or through recorded means).
- Provide realistic information about Indiana State Government and its culture.
- Direct the employee to complete required paperwork (i.e. Form I-9 and payroll paperwork).
- Explain Indiana State Government policies and procedures including the Performance Management Cycle.
- Explain health benefits and wellness program.
- Instruct employee on how to complete required trainings (i.e. Ethics, IRUA, and Sexual Harassment Prevention).

In addition to Day 1 orientation provided by your Human Resources Department, the agency may want to conduct a Day 2 agency specific orientation. On the employee's second day, your Human Resources Representative, Hiring Manager, other appropriate personnel will:

- Begin the day by describing the agency's vision, mission, and values and the importance of the new employee's job to achieving these.
- Provide realistic information about the agency and its culture.
- Introduce the new employee to his/her manager.
- Introduce the new employee to his/her mentor (optional).

Maintain Energy from Day One & Ensure the New Employee Has Meaningful Work to Do In the First Week

Traditionally, one of the least attended games of the year for baseball teams is the second game of the season, after the excitement of opening day has worn off. During the third phase, we need to take affirmative measures to ensure new employees don't experience a similar letdown on their next few days. Colleagues in the new employee's work area – managers, peers, mentors, senior leaders–play a key role motivating and acculturating the new employee during this time. The new employee should be able to spend some or all of this week engaging in purposeful work, seeking resources required to perform work, and acclimating to the job and surroundings.

During the remainder of the first week, managers should:

- Ensure that job roles and responsibilities are clearly communicated to the new employee.
- Introduce the new employee to other employees, team members and senior staff.
- Provide meaningful work for the new employee, either training or substantive work related to the new job.
- Ensure your respective senior leader welcomes the new employee.
- Review the organizational structure and key staff.
- Provide a list of contacts who can address the new employee's questions on a variety of issues.

Deal With Issues Early to Ensure the Employee Is On the Right Path

During the fourth phase, "first 90 Days," new employees should begin to acquire a full workload while managers monitor performance and provide early feedback. Like the first day, this period is critical to forming new employee perceptions about the agency and job. A lack of focus during this phase can have negative consequences if employees do not feel integrated by the end of their first 90 days. Your role as manager is essential to the success of the onboarding program.

During this period, managers should:

- Review performance objectives and set individual development goals.
- Give constructive feedback early and often.
- Provide training, as needed, to help the new employee understand internal systems, general operating practices and to obtain other information or skills required in the performance of his/her job.
- Discuss individual work styles and preferences.
- Arrange for the new employee to meet key stakeholders from other departments.
- Check with new employees regularly to ensure they continue to assimilate and expand their capabilities.

WHAT ARE THE PROGRAM GOALS?

Implementing a well managed onboarding process can have significant and measurable impact on employee productivity, retention, employment brand, services, workplace safety and future hiring. We expect our program to:

1. Significantly enhance the new employee's experience (see figure 4.0).
2. Present a clear message and deliver consistent information.
3. Improve the effectiveness and speed in which a new employee becomes a fully contributing member of our team.
4. Increase retention of new employees.

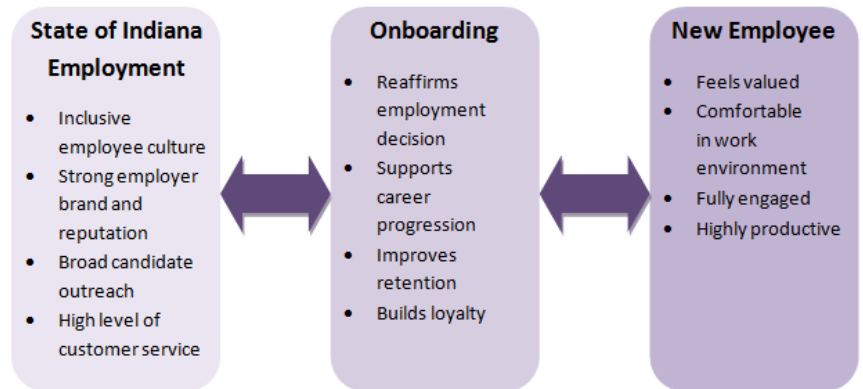


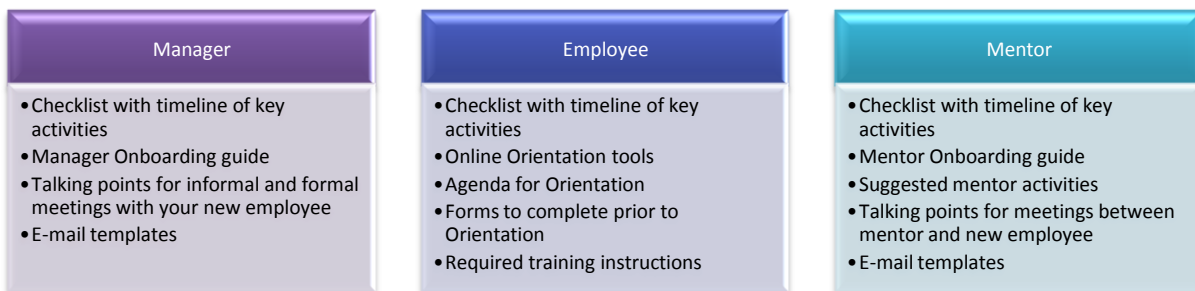
Figure 4.0 Employee Experience

WHAT IS MEASURED?

The program goals will be measured through periodic surveys administered to the new employee (who completes an SPD orientation) at 30, 60, and 90 day intervals. These results will be submitted to your Human resources representative on a quarterly basis or as requested.

WHAT TOOLS ARE AVAILABLE?

You can encourage any new employee to visit our Onboarding website which contains a variety of tools to help ensure your new employee has a best in class Onboarding experience. Managers, Supervisors, and Mentors can visit the SPD training website for additional Onboarding resources.



If you have questions about creating an onboarding plan for your new employee, contact your HR Representative.

www.in.gov/spd/onboarding

¹Building the Business Case for Onboarding, December 2009, Aberdeen Group

²Getting On Board A Model for Integrating and Engaging New Employees, May 2008, Partnership for Public Service, Booz Allen Hamilton