On-boarding

A Process for Retaining the Best Talent
Introduction to On-boarding

On-boarding is a major tool in successful talent management and is critical for successful employee integration. On-boarding creates an understanding of the organizational culture that helps the newly hired employee feel better connected to the organization’s business strategy and creates a sense of belonging. Implementing a well-managed on-boarding process can have a significant and measurable impact on employee productivity, retention, employment brand, services, workplace safety, and future hiring.
What is On-boarding?

On-boarding 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.
## On-boarding vs. Orientation

<table>
<thead>
<tr>
<th>On-boarding</th>
<th>Orientation</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Comprehensive, broad, and ongoing employee integration</td>
<td>• Brief period usually limited to one or two days</td>
</tr>
<tr>
<td>• Begins when job offer is extended and accepted</td>
<td>• Provides basic employment information</td>
</tr>
<tr>
<td>• Extends over several months</td>
<td>• Completion of new hire paperwork</td>
</tr>
<tr>
<td>• Introduction to organization’s structure, mission, vision, values, and business strategies</td>
<td></td>
</tr>
<tr>
<td>• Socialization process to understand organizational culture and etiquette</td>
<td></td>
</tr>
</tbody>
</table>
What is the Primary Goal of On-boarding?

A Fully Engaged & Productive Employee
What is the Importance of On-boarding?

- **Employee Engagement**
  - Keeps the new employee engaged and excited about the organization and his/her choice to accept the position
  - Decreases the time it takes the employee to get to the desired level of productivity
  - Builds loyalty

- **Employee Productivity**
  - Ensures that the employee feels welcomed, a valuable part of the organization, and comfortable with the work environment as quickly as possible, all vital to the employee’s success

- **Employee Retention**
  - Can be based on how the employee is treated the first 30-90 days of employment
  - Can be affected by the support the employee receives in developing and progressing in his/her career
Importance of On-boarding

New Employee

- Reaffirms Employment Decision
- Fully Engaged & Productive
- Supports Career Progression
- Improves Retention
- Builds Loyalty
- Feels Valued
- Comfortable In Work Environment

- Helps the new employee:
  - Feel valued
  - Reaffirm employment decision
  - Feel comfortable in the work environment
  - Support career progression
  - Improve retention
  - Build loyalty

- Supports career progression and improves retention.
On-boarding Cycle

**Off-boarding**
Occurs when the employee leaves the organization

**Pre-Boarding**
Begins when the job offer is extended & accepted

**On-boarding**
Continues until the employee is fully functioning & productive. May last up to 12 months.
On-boarding Team

Click the arrows for additional information.

• Core Team Members
  – Human Resource
  – Supervisor
  – Work Buddy/Mentor
  – Work Unit Team

• Additional Team Members
  – Information Technology Staff
  – Training Unit
  – Agency Head
Key On-boarding Components

**Forms**
The collection and processing of new employee data including employment and benefits forms, background checks, and security access.

**Tasks**
The process used to get the new employee to full productivity as quickly as possible. This process includes: assigning a work station setting up computer, phone, and e-mail accounts; and ordering equipment and supplies.

**Socialization**
The practices of making the new employee feel a part of “the team” by: assimilation into the organizational culture; learning about policies and expectations; building relationships and providing feedback; and keeping the new employee up-to-date on how s/he is doing.
On-boarding Metrics

- Increase in retention of new employees
- Improvement in new employee engagement
- Decrease in time it takes to get a new employee to the expected level of productivity
- Reduction in the on-boarding cost per new hire
- Improved service delivery to stakeholders and customers because of more effective employees
- Positive reputation for organization’s brand as the “employer of choice”
On-boarding Metrics

Positive Employer of Choice Brand

Increased Retention Rates

On-boarding Metrics

Improved Service Delivery to Stakeholders & Customers

Reduced On-boarding Costs

Increased Engagement

Decreased Time to Productivity
Results of Successful On-boarding

- Creates a positive experience for the new employee
- Provides ongoing, clear, and concise channels of communication
- Provides learning objectives at every organizational level
- Aligns the new employee with key business strategies
- Sets milestone measures to determine new employee success and the time-to-productivity
- Reinforce the business employment brand
Results of Successful On-boarding

New Employee

- Employment Brand
- Positive Work Experience
- Clear/Open Communication
- Learning Objective at All Levels
- Align Key Business Strategies
- Successful Milestones/Measures
The On-boarding Process
Step 1: Pre-boarding

- Begins as soon as the candidate is offered and accepts the position.
- The new hire connects with human resources, the supervisor and work buddy/mentor as primary points of contact.
- The supervisor makes arrangements for the employee’s work station and basic equipment and supplies and assigns the work buddy/mentor.
- Human Resources contacts the employee to notify him/her of information and documents needed for the first day and to see if he/she has any questions about the job or benefits.
- Human resources or the supervisor notifies the employee regarding parking for the first day.
- The work buddy/mentor should contact the employee prior to the first day to establish rapport and to offer assistance.

Click here to see the pre-boarding checklist.
On-boarding Process
Step Two: On-boarding – First Day

• The supervisor should be present to welcome and greet the new employee and make introductions to the work team and key staff members.
• The supervisor (or designee) gives a tour of the office/facility.
• Human resources staff gives general new employee orientation and has the employee complete benefits, payroll, and other employment forms, including emergency contact information.
• The supervisor should provide a review of the organizational mission, vision, values and key business strategies and reviews the Employee Work Profile (EWP), organizational chart, work expectations and standards, and performance evaluation process.
• The supervisor should provide a schedule of training, online resources, policies and procedures, office directory and contact information, instructions for using the phone, computer, and help desks.
• The supervisor (or designee) should show the new employee how to obtain additional equipment and supplies.
• Allow adequate time for the employee and work buddy/mentor to interact throughout the on-boarding process.
• A planned office gathering (luncheon/take employee to lunch) is advisable to welcome the new employee.

Click here to see the first day checklist.
On-boarding Process
Step Two: On-boarding – First Week

- The employee should continue to receive detailed information that reinforces the information given on the first day and receive additional information relevant to the job.
- The supervisor and human resources should get feedback on how the new employee is adjusting and if the organization is delivering on what was promised and allow time for the employee to discuss any concerns.
- The supervisor should continue to review the work expectations and standards until all areas are covered.
- The supervisor should ensure all of the employee’s questions and concerns are being addressed throughout the on-boarding process.
- Continue completion of employment and benefits forms and review of policies and procedures, organizational culture, etiquette, security and safety procedures, attendance and leave policies and procedures and work assignments.
- The supervisor should make cross-departmental and external customer introductions.
- The supervisor should begin review of Employee Development Plan.
- The supervisor provide adequate time for the employee and work buddy/mentor to interact throughout the on-boarding process.
On-boarding Process
Step Two: On-boarding – First Month

• The supervisor should continue to reinforce key information and introduce the new employee to additional staff, including key members of the leadership team and external customers.
• The supervisor should ensure that the employee’s questions and concerns are being addressed throughout the on-boarding process and get feedback from the employee regarding the on-boarding process.
• The supervisor should ensure that the employee understands the organization’s mission, vision, and values and their connection to his/her role and job responsibilities in the organization.
• The supervisor should continue to provide the employee with feedback and discuss the progress he/she is making related to the job.
• The supervisor should monitor the new employee’s integration into the organization and work groups throughout the on-boarding process.
• The supervisor should continue to review the work expectations and standards and performance management until all areas are covered.
• The supervisor should ensure that the work buddy/mentor and new employee are meeting regularly and establishing a productive relationship.

Click here to see the first month checklist.
On-boarding Process
Step Two: On-boarding – 90-Day Review and Evaluation

• The supervisor should continue to reinforce key information and introduce new employee to additional staff including key members of the leadership team and external customers.
• The supervisor should ensure the employee’s questions and concerns are being addressed throughout the on-boarding process and get feedback from the employee regarding the on-boarding process.
• Human resources should schedule a face-to-face meeting with the employee to get feedback on how the on-boarding processing is working.
• The supervisor should reinforce the organization’s career development philosophy and how it applies to the employee and encourage the employee to contact the Department of Human Resource Management Career Career Center for one-on-one career planning assistance.
• The supervisor should ensure the work buddy/mentor and new employee are meeting regularly and establishing a productive relationship.

Click here to see the 90-Day checklist.
On-boarding Process
Step Two: On-boarding – First Year Review and Evaluation

• The supervisor should conduct a thorough assessment, ensure all necessary information has been shared, and address the employee’s questions and concerns.
• The supervisor should prepare for the annual performance evaluation.
• Human resources should conduct a formal evaluation of the on-boarding process.

Click here to see the first year check list.
The On-boarding Process
Step 3: Off-boarding

- Security Deactivation
  - Identification Badge
  - Building & Parking Access
  - Credit Card(s)
  - Email and Phone Access
- Asset Recovery
- Finalize Payroll, Leave, and Benefits Requirements
- Confidential and Proprietary Information
- Face-to-Face Interview with Human Resources
- Online/Mail Exit Interview/Survey

Click here to see the off-boarding checklist
Human Resources

The human resource staff’s role begins early in the on-boarding process during the recruitment and hiring phase. Often, a member of the human resource staff is responsible for scheduling the initial and subsequent interviews with the applicant and responding to questions. Responsibilities may include:

- Providing an overview of the Agency On-boarding Process
- Ensuring completion of new hire employment and benefits forms
- Acquiring building and floor access cards and/or identification badge
- Explaining payroll, benefits, and other relevant employment information
- Answering questions throughout the process

Click to return to the On-boarding Team slide.
Supervisor

One of the most important relationships the new employee will have is the relation with the supervisor. Research shows that most employee turnover is ultimately caused by the relationship the employee has with his or her supervisor. Therefore, the supervisor should be proactive and engaged in facilitating the employee’s integration into the organization. This makes the ability to assimilate new employees a core competency of supervisors.

An employee’s immediate supervisor ultimately controls his or her project assignments, educational opportunities and career progression. Therefore, the supervisor who takes time to provide information, discuss issues, and show concern over the employee’s assimilation, and who knows what the employee can do and wants to do, will make wiser decisions and build loyalty over time.
Supervisor’s Responsibilities

- Assigning a workstation with computer, phone, equipment, and office supplies
- Assigning a work buddy/mentor
- Notifying co-workers and key contacts of the new employee’s start date
- Introducing fellow team members, other members of the organization, and external customers
- Conducting a tour of the facility
- Ordering business cards and business phone and credit cards, if applicable
- Reviewing the history and background of the organization
- Reviewing the agency’s mission, vision, and values
- Reviewing duties and responsibilities and work standards and expectation
- Reviewing the agency’s business strategy, goals and objectives
Supervisor’s Responsibilities (cont.)

- Reviewing how things get done and the work flow processes and departmental structures
- Discussing organizational culture and appropriate work behaviors
- Reviewing performance standards and how the standards will be managed and measured
- Discussing goals and developing an employee development plan
- Reviewing the departmental organizational chart
- Reviewing other roles and relationships within the department
- Providing reference materials (i.e., phone directory, staff/other contact, voice mail and email instructions)
- Creating a training schedule for the employee
- Answering day-to-day questions

Return to the On-boarding Team slide.
A Work Buddy is a person assigned as an informal contact to guide the new employee through the socialization process into the organizational culture. The use of an informal contact is referred to as the “buddy system” and is designed to make the new employee feel welcomed, answer questions, and help the new employee navigate through the formal and informal organizational culture. The work buddy should be a person with a positive attitude and the ability to assist with integration into the informal office environment. A work buddy should be interested, positive, knowledgeable, and personable. The work buddy should also be an immediate resource for any questions and to help guide processes of building productive work relationships, attaining organizational knowledge, and effectively solving work-related problems. Using the buddy system can enhance job satisfaction, thus getting the employee to the desired level of productivity faster.

Responsibilities may include:
Work Buddy Responsibilities

• Providing socialization into the organization by helping the new employee get to know co-workers and other important work contacts

• Introducing the employee to others within the organization not introduced by the supervisor

• Introducing the employee to the informal office rules, behaviors, and practices

• Answering day-to-day questions
Mentor

A **Mentor** is a supporter assigned to a new employee. A mentor can be assigned to any new employee. However, mentors are usually assigned to employees hired in a supervisory or management position and to interns. The mentor functions in a similar capacity as the work buddy by providing guidance through the socialization process into the organizational culture. However, the mentor’s relationship with the employee is focused more on training, teaching, advising, and sharing practical experience with the new employee. The mentor should be an experienced professional who exemplifies the kinds of behavior and results the agency would like all of its employees to exhibit. The mentor should know the agency and the field to effectively guide the new employee in the right direction and establish the right attitude toward the organization’s goals and objectives.

Responsibilities may include:
Mentor Responsibilities

• Providing socialization into the organization by helping the new employee get to know their co-workers and other important work contacts

• Introducing the employee to others within the organization not introduced by the supervisor

• Introducing the employee to the informal office rules, behaviors and practices

• Providing guidance, training, teaching, advising, and practical experience

• Answering day-to-day questions

Return to the On-boarding Team slide.
Work Unit Team

The employee’s team members are the co-workers assigned to the work unit. They are the people who will work with the employee on a day-to-day basis. The team members should make the employee feel welcome and provide support to the employee until the person is fully productive. Responsibilities may include:

• Explaining how the group works together as a team
• Explaining how to get things done
• Assisting with how to order equipment and supplies
• Answering day-to-day questions

Return to the On-boarding Team slide.
The information technology (IT) staff person ensures that the employee has the technology needed to perform the job. Responsibilities may include:

- Establishing the computer and network setup (includes required software, hardware and network login)
- Ensuring email set up (with access and password)
- Establishing telephone access with voice mail set up
Training Unit

In some organizations, the training unit may be responsible for developing on-boarding training materials and delivering certain components of the on-boarding process not covered by the other on-boarding team members. Responsibilities may include:

- Developing training materials and videos.
- Conducting new employee training classes (e.g., organization’s history, safety, supervisory/management, etc.).
- Providing an orientation to internal and external training and resources.

Return to the On-boarding Team slide.
Agency Head

New employees should have an opportunity for some interaction with the top executive(s) in the agency. This interaction can consist of a short meeting during the first week or planned time within the first 30 days. The top executive in the organization should discuss and review the following:

- Mission, vision, and values from the executive-level perspective
- Organization’s past and future direction
- Strategic goals and objectives of the organization
- Description of desired Organizational culture