

# 7

## STEPS

### to effectively onboard a new employee



The following highlights the steps required for HR and managers to effectively onboard a new employee. A best-practice onboarding process begins immediately following the job offer and can extend up to two years.



#### Onboarding checklist:

Use these steps in conjunction with our Onboarding checklist to ensure new hires feel welcome in the organization from the beginning and are able to start contributing in their new role quickly.



### 1

#### New-hire setup

BEFORE THE NEW HIRE'S FIRST DAY:

Distribute either company-wide or departmental communications introducing the new employee and their role, so people are prepared for their arrival.

Register the employee for the new-hire onboarding/welcome session.

Assign the new-hire a buddy or go-to person. Ideally, the buddy should be familiar with the new-hire's role so they are able to answer any questions.

Order and set up the employee's workstation with required furniture and office supplies. Set up their telephone (desktop and/or mobile).

Ensure the employee's computer is set up and required software is installed.

Enroll the employee in the payroll process.



### 2

#### HR information & processes

DAY 1: HR MEETS WITH NEW EMPLOYEE FOR NEW-HIRE ORIENTATION.

Share and review the employee handbook.

Review and obtain employee signature on: compensation and benefits paperwork, non-compete and non-disclosure policies, vacation/sick leave policy, etc.

Show the employee where their employee profile information is stored and verify that it is correct.

Training department conducts employee training on health and safety, harassment, information security, ethics, etc.



### 3

#### Understanding the organization

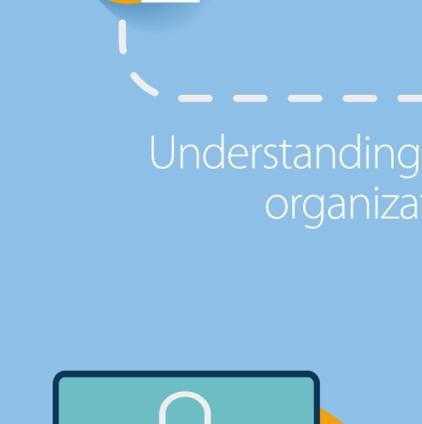
HR OR MANAGER:

Reviews the organization's mission, vision, values and culture.

Reviews the organization's goals for the coming year.

Reviews the organization's structure and indicates where the new hire fits in.

Introduces the employee to the organization's products, services, target markets, competition.



### 4

#### Tools and equipment orientation

HR OR MANAGER:

Demonstrates how to gain access to the building/employee work area and explains access restrictions.

Gives the employee their passwords (network, email, voicemail, etc.)

Gives the employee a walking tour of the facilities. Points out kitchens, employee break rooms, washrooms, office supplies, printers, mail, etc.



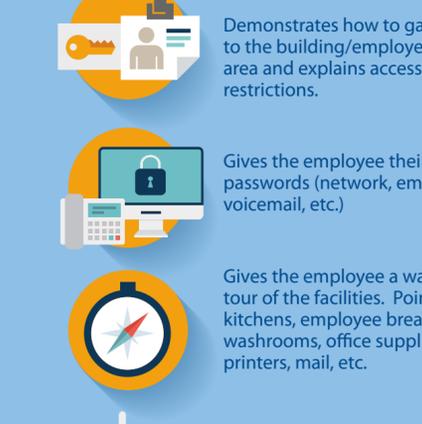
### 5

#### Network building and introductions

HR OR MANAGER:

Buddy introduces the new-hire to his/her teammates, colleagues in the department, and any outside partners and contacts.

Manager introduces the new-hire to the managers and leaders in the department's hierarchy.



### 6

#### Introduction to the job

HR OR MANAGER:

Manager reviews the onboarding development plan with the employee.

Employee reviews and signs off their job description.

Manager and employee review and discuss the core and job-specific competencies the employee will be evaluated on.

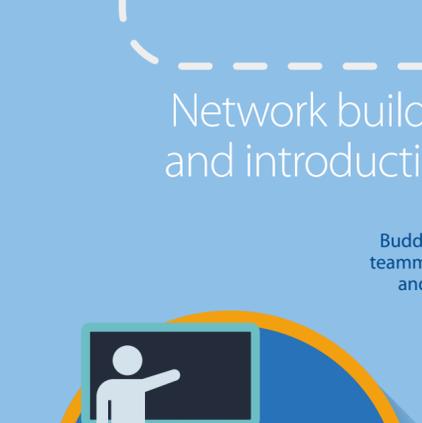
Manager and employee collaboratively set goals for the coming period and discuss how they align to organizational goals.

Manager and employee collaboratively establish a development plan that will support the employee's success.

Manager and employee establish a regular schedule for reviewing/discussing progress and performance.

Manager and employee review the organization's performance management process and activities.

Employee takes training relevant to his or her new role.



### 7

#### Ongoing check-ins and performance reviews

HR OR MANAGER:

Closely follows the new employees performance and development in their first two years of employment.

Conducts 30-60-90-day onboarding performance reviews, then quarterly, semi-annual and/or annual performance reviews.

Discusses career development and sets collaborative development plans.

Schedules regular check-ins with the employee to ask questions like:

- Are you clear about your goals?
- Are you thriving in your environment and if not, why?
- Are you getting what you need to accomplish your goals?
- How can help you be successful?