

# Onboarding

***Onboarding has three phases – preboarding, orientation and onboarding. As a people manager, you are responsible for ensuring all three phases are planned and executed well, as this process is key to retaining your new employees. It matters!***



## Preboarding

Preboarding is a series of activities done before a new hire's first day to excite them about the job and to prepare them and the organization for their first day. Here are some preboarding activities you might use:

- Send a welcome package to their home. It can include some basic first-day information, like benefits or where to park, some branded swag, or some of your company's products.
- Write a handwritten note from you and your staff that welcomes the new team member.
- Coordinate with IT and Facilities ahead of time to make sure the new hire is fully set up before they start. There's nothing worse than arriving on your first day to find you don't have a login, email, computer, phone, desk, uniform, security pass or anything else you need to do your job.
- Make an announcement on social media. It tells the new person you're excited about them joining the company. Just be mindful of the timing to ensure they've given notice to their current employer.
- Schedule a lunch with the new hire and include your other team members. This goes a long way in making your new team member feel welcome.
- Keep in touch with your new hire between the offer and their first day. Share relevant news with them to encourage them to feel excited about joining your team and the organization.
- Provide as much paperwork as possible before starting – such as the W4, benefits information, and a copy of your employee handbook.
- Clean their workspace!



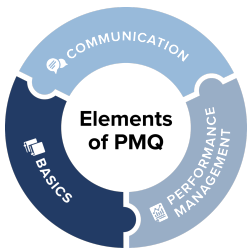
## Orientation

Typically, orientation is the first few days on the job when a new hire is introduced to the organization, meets with Human Resources (HR) to learn about the benefits, etc., completes their paperwork, meets with you to learn about their job responsibilities and starts to learn the processes and procedures from you and their team members.

### Tasks that should be completed on the first day for your new hire are:

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- Greet the new hire in the lobby
- Provide a tour of the building
- Allow time for an HR orientation
- Eat lunch with you and the team
- Go over their specific role, including:
  - Review daily responsibilities
  - Demonstrate specific applications
  - Provide an overview of the culture
  - Review high-level processes & procedures
  - Discuss project assignments
  - Assign an onboarding buddy
  - Ensure team members are available for questions and guidance



## Onboarding

Onboarding is an ongoing process over several months to ensure the new hire is established within the organization and has the tools and resources to be successful.

**Onboarding helps increase job satisfaction** because it provides a framework for the new hire to build relationships with their new coworkers.

**Successful onboarding increases performance** by providing the information and support they need while they learn their new job and culture.

**Well-planned and implemented onboarding cuts down on turnover** by offering feedback and coaching during those first few months. As a result, new employees have a more solid footing in their new roles, which makes them less likely to feel like they just made a giant mistake.

### Onboarding Checklist for the People Manager:

- Set-up regular one-on-one meetings.
- Review the new hire's 90-day goals.
- Introduce the new hire to other departments and allow time for shadowing others to fully understand their roles.
- Ensure the new employee understands the organization's structure and workflow.
- Discuss and schedule training and development opportunities.
- Schedule ongoing team lunches.
- Take the time to informally check in with your new hire in their work environment.
- Assure the new hire that you are available for them at any time, especially during this crucial 90-day period.
- Keep an eye on how the team is working with the new hire and how the new hire is working with their new team members.
- Ask the new hire to complete an onboarding survey after the first 90 days.