



# ONBOARDING TOOLS

## *for hiring managers*

Tips, tools and rules to set your new employees up for success

phase(two)learning  
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# **Onboarding Tools for Hiring Managers**

*Tips, Tools & Rules to Set Your New Employees Up for Success*

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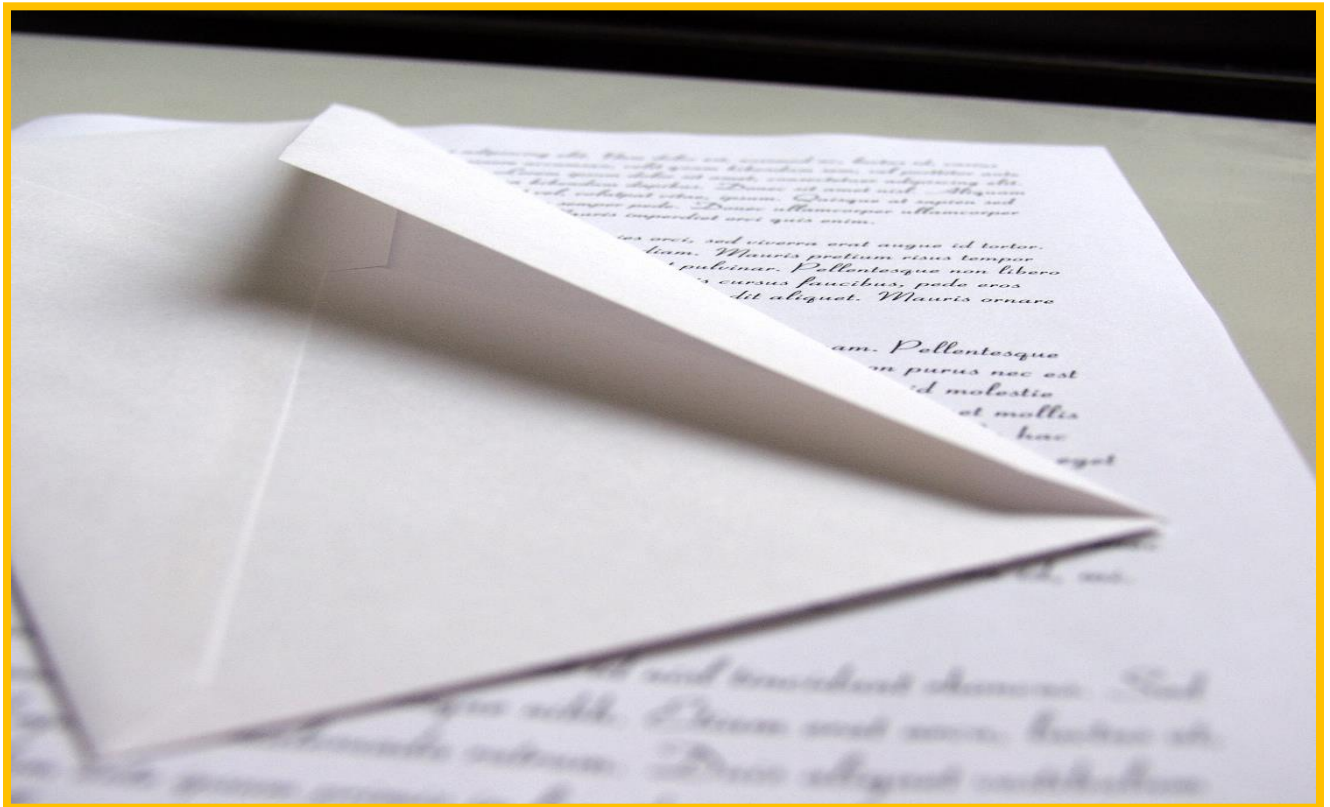
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# INTRODUCTION

## AN OPEN LETTER TO HIRING MANAGERS



# Dear Hiring Manager,

Monday morning, your new employee will be walking through the front door of your company, eager to begin his new job on your team. How much time have you invested in planning his onboarding?

**Yes, you. How much time have YOU spent planning his onboarding?**

Notice I didn't ask how much time Human Resources has spent planning his onboarding. Chances are, HR knows what to do. Whoever is responsible for managing the Orientation process likely has a plan in place for your new employee, and for any other new employees who are starting on Monday. Hopefully, your new employee will get an introduction to the company, as well as general information that will help him begin to become integrated with the organization.

But what about becoming integrated with your team? Or integrated with his new role? I'm willing to bet that all new employees will receive a similar, if not identical, orientation experience. This is where you step in, dear Hiring Manager.

You are the most important component for the new employee to achieve success and become an involved part of the team. You are the link that will help the new employee build relationships with colleagues, stakeholders and vendors. You are the mentor that will guide the new employee in setting goals and exceeding expectations!

You might not be a trainer, by trade. The thought of "training" a new employee may sound like the least exciting thing you could possibly do. In fact, you might have delegated training new employees to someone on your team, or maybe you have a trainer on your staff that takes care of it. For system, task and process-related duties, that's fine – and quite honestly, these people are probably better at communicating those details. But please don't neglect the dozens of conversations your new employee needs to be having with you – his leader, his mentor.

These conversations should include:

- *Day-to-day expectations – schedules/working hours, policies and guidelines, communication preferences*
- *Current and upcoming projects the employee will be involved with or leading*
- *Explaining the employee's – and the department's – role in the organization, and how the roles interact with other people and teams*
- *Introducing the employee to others – help the new employee forge alliances!*
- *Help the employee set performance goals for the first 30, 60, and 90 days...are they SMART goals? Do they align with departmental and organizational goals?*

Take a good look at these bullet points. It's safe to say that your company's HR specialist or Learning & Development practitioner isn't the ideal person to facilitate these conversations. It's not part of "Orientation"...and it really shouldn't be.

**"Orientation" and "Onboarding" are two different things.** Orientation will help your new employee begin to understand more about the company he joined. A solid Orientation program will make sure the basics are taken care of; but it is up to you, Hiring Manager, to ensure that the employee becomes integrated with the team YOU lead, and that he has the tools he needs to successfully do his job.

**Orientation is an event. Onboarding is a process.**



There are a number of people involved in the successful start of a new employee's journey, but I can't think of one more important than you. Be there on your employee's first day. Be there physically. Be there emotionally. Be there proactively. Anticipate the employee's needs. Be consistent with all of your new hires.

**The success, engagement and loyalty of your new employee begins with you, and the amount of effort you put into his onboarding.** "Sink or swim" doesn't work. Even a 20-year expert in your industry is still "new" on his first day. It will take time before he is a fully contributing member of the team. You must accept that.

In this eBook, you will find a number of recommendations, tips and best practices for making the most of the onboarding period for your newest employees. At the end of each section, you will also find an area to reflect on your role, team, organization and onboarding needs. **Think, scribble, and think some more.** Make a plan.

Be the manager you'd like to work for.

You've got this, Hiring Manager.



**"Managers often don't have the mindset to understand the impact they have on their employees, particularly their vulnerable new hires."**

- Donna Kohler – CEO, The Inside Coach, Inc.

# CHAPTER ONE

## TOO BUSY FOR ONBOARDING?





# TOO BUSY FOR ONBOARDING?

A company, particularly a small company, is an interesting thing, isn't it? Growing a product, service and team, sometimes from nothing more than an idea:

“Wouldn't it be cool if we...” (and a company is born)

Throughout my career, I have received quite an education on how many different types of organizations view workplace learning. The sad truth is, it's often an afterthought. Somewhere between the “Wouldn't it be cool if we...” stage and the “Oh my gosh, we have 150 employees – now what??” stage is the “Maybe we should be training these people?” stage. As an advocate for workplace learning, it really kind of stinks, but it's reality (queue the sad trombone).

Recently, I had a conversation with a fellow learning professional who has been implementing an onboarding program at her company, a tech startup. It is a terrific process. A process that involves hiring managers. A process that is championed by the CEO. A process that welcomes new employees to the company, team and role.

And it's a process that many of their hiring managers claim to be “too busy” to follow.

If I had a nickel for every time I heard that...

Managers, everyone is busy.

Trust me, I get it. I'm a manager too. I know how many directions we're pulled. So, please know that I'm saying this with nothing but respect: Please stop using the “I'm too busy” excuse.

**The truth is, you are too busy NOT to provide a sufficient onboarding experience for your new employees.**

I've directed a lot of attention toward hiring managers on the phase(two)learning blog. I know I can be a little tough, but only because coaching new (and seasoned) employees is part of your job. It's the price of admission for a manager. Even if there isn't a specific nugget on your job description that tells you to do it. **This is a key distinction between an individual contributor and a manager...it's not all about you anymore.** You have people to look out for; people who are looking to you for guidance.

So, back to being busy. Like I said, I understand, I really do. Here are 3 simple ways to incorporate onboarding into your daily routine, when a new employee joins your team:

### **1. Make him your shadow.**

If you already have meetings to attend, bring your new employee along to observe (when it makes sense). At the start of the meeting, introduce your new team member and briefly explain how he will benefit from observing the meeting. Don't expect him to participate (unless he has something to add); it's okay if he just listens and takes notes. He is learning about the topic of the meeting, sure...but also about how meetings work in your organization, how teams and roles interact and other culture lessons.

### **2. Leverage lunch.**

Chances are, you eat lunch most of the time. Whether it involves leaving the building or brown-bagging it, make an effort to eat with your new employee once in awhile. Invite others along. By doing this, you are building camaraderie and integrating your new employee to the team. During these informal moments, many topics are discussed. It's a great way to encourage dialog and open communication.

### **3. Always answer "why".**

Whenever you meet with your new employee, explain something, answer questions or provide information, make sure you explain WHY things are the way they are. It takes time for a new employee to gain context, and they don't always know what or how to ask. We don't know what we don't know. Pretend the new employee is asking "Why?" like a curious preschooler, and tell him.

There you have it – by doing these three things, you are immersing your new employee into your culture. You're proactively communicating. You're providing context. Three things that are absolutely critical during the first weeks on the job.

And for these three suggestions, you don't have to add a single item to your lengthy to-do list. Even better!

# Make it real

**Think about how you can incorporate onboarding into your daily routine. How can you build a relationship with your new employee? Use the space below to reflect and take notes:**

What meetings do you attend that might benefit your new employee to attend?

Are there any tasks or projects that you could delegate to my new employee? How would they be a learning experience?

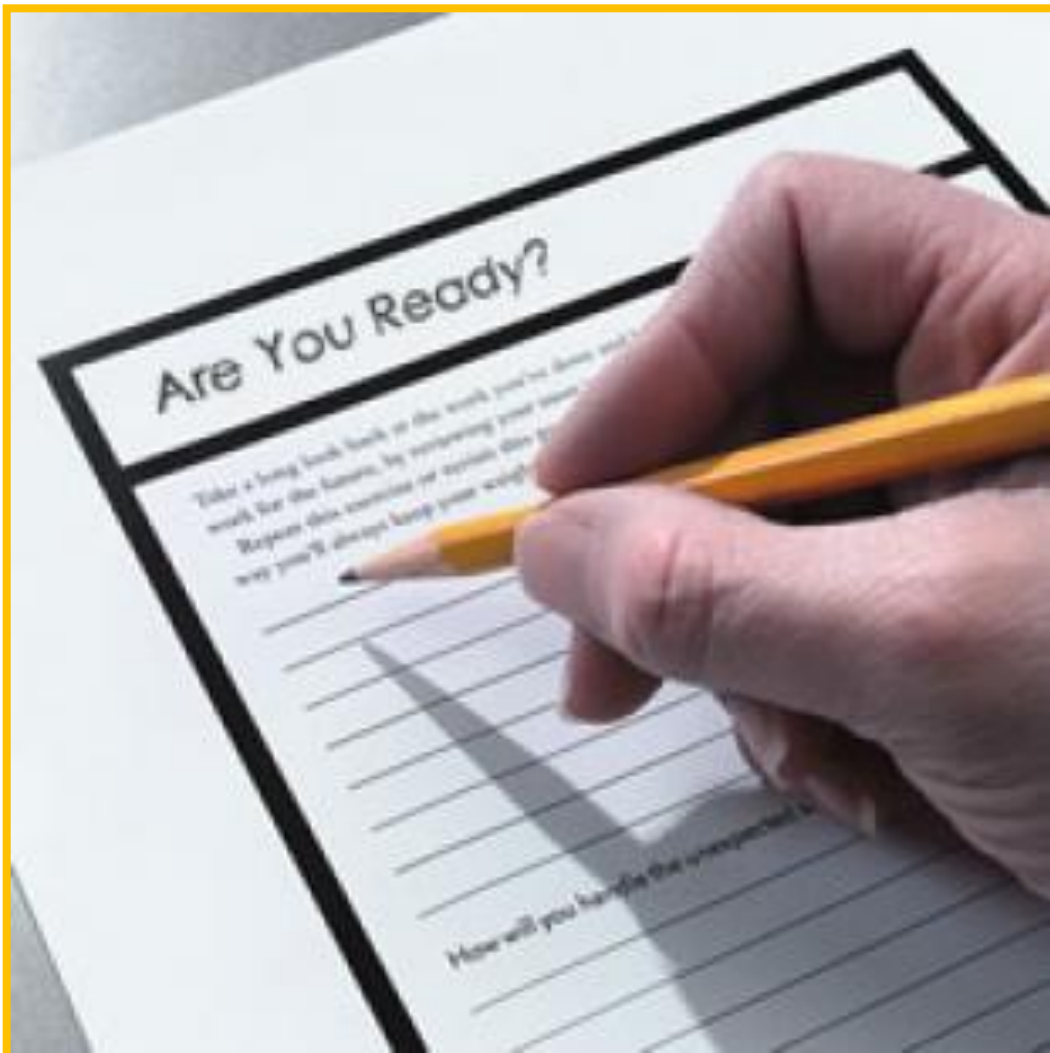
How can you help your new employee understand WHY?

What might be confusing or hard for a new employee to understand? How can you make this clear?

***Be honest....how often do you use the “busy” excuse?***

# CHAPTER TWO

## READY OR NOT?



# READY OR NOT?

Hey manager! Ready or not...here comes your new employee!

If you don't have a lot of turnover on your team, you may not give a lot of thought to preparing for a new employee's arrival. On the flip side, if you are often bringing on new team members, you might find yourself lacking a consistent preparation process.

I've mentioned it before, but it bears repeating: the hiring manager plays a key role in the successful onboarding of a new employee. I can't say it enough. In fact, I'm going to say it again:

**The hiring manager** (that's you, maybe??) **plays a key** (mission-critical, really) **role in the successful onboarding of a new employee.**

Sure, other people play an important role in the process, too. But this is on you. Whether you do it yourself, or you delegate some of the tasks to others on your team, you need to make sure that certain things are ready before your newest team member walks through that front door on his first day.

Now, don't stress, my friends. I'm going to do some of the legwork for you.

Here is your to-do list, a simple compilation of 10 things that you need to have ready in preparation for an employee's first day.

Once you review the list, use the *Make it Real* section to create your own customized to-do list.

## **1. The employee's desk/workstation/office**

Everyone needs a place to sit. You wouldn't believe the horror stories I've heard about people starting new jobs, only to find their desk had been serving as the office catch-all, or was still full of junk left over from the previous desk tenant. I have personally moved into an office, only to find a stockpile of stale granola bars, likely sitting there since the Reagan administration. Yuck. Give your new employee a clean home, please.

## **2. The employee's computer, phone and other necessary equipment and supplies**

You can't expect an employee to do his job unless he has the tools to do so. Make sure this is taken care of in advance; scrambling around after an employee has started sends the message that disorganization reigns supreme in your office. And nobody wants to work in that environment.

## **3. A lunch date with you on his first day**

Take him out of the building, if possible. Ask him what he thinks so far. Does he have any questions? Learn more about him as a person. Be genuine. Start building the foundation for a solid professional relationship.

## **4. A team lunch or social event during his first week**

Help him get acquainted with the folks he will be working with. The sooner he can build these allies, the more it will help him assimilate into the team and company culture, and the more he will be able to learn from them.

## **5. Plenty of meeting time on your calendar during his first few weeks**

Block time on your calendar as soon as you set the new employee's start date. Give him feedback. Ask for his feedback. Set expectations early on. Open communication is so important during the onboarding process. What am I saying...it's important all the time.

## **6. Tasks of projects where the new employee can contribute during the first weeks**

Securing "quick wins" is a major factor in the successful onboarding of leaders at all levels. Look for opportunities for the new employee to be productive, early on. He doesn't need to solve complex business issues – after all, he doesn't have the context around the issues yet to fully grasp them. But finding strategic areas to contribute will help him build his credibility with you, with the team and across the organization.

## **7. Personally introduce the new employee to key stakeholders across the organization**

Take the time to walk him around and make some introductions. Coordinate an email or introductory audio/video conference to introduce the new employee to remote colleagues, partners or vendors. Schedule informal meet-and-greet sessions. Make sure your new employee is visible.

## **8. Coordinate a corporate credit card/expense account, travel details or a company car (if needed)**

If your new employee will need these items, make sure your employee has them. A new employee will not necessarily understand the process, nor will he know who the go-to people are to arrange these details. Take a moment. Take care of it.

## **9. Make arrangements for the new employee to attend any company-wide or department-specific new hire training**

Craft short and long-term learning plans for the new employee. Make sure he is fully enabled on systems, processes, products and any compliance-related topics. A knowledgeable, confident employee is often a more productive, loyal employee.

## **10. Do something nice for your new employee**

Even the simplest gesture can tell the new employee that you're happy he is on the team. Have the team sign a welcome card. Have fresh flowers waiting on her desk when she arrives on her first day. If your organization is big on branded swag, have a fun coffee mug or t-shirt ready. It really doesn't matter WHAT you do...just take a moment to show your appreciation. Give the new employee a reason to smile on the drive home that night.

Not so scary, huh? You can definitely handle this.

Some of these items are very practical and specific. Others will vary, based on the new employee's role, your personal style and the company's culture. Regardless, these items should somehow be incorporated into your process.

In the *Make it Real* section, tweak these guidelines and make them your own. Your new employees deserve to have a positive onboarding experience, don't you think?

# Make it real

**What is on your onboarding preparation checklist? Use the space below to reflect and take notes:**

1. How do you get a desk/workstation/office ready for a new employee?
2. Who can assist with getting a computer, phone and other equipment in place?
3. Have you scheduled lunch on the employee's first day? Is your calendar blocked? Is there time during Orientation to leave the building?
4. What could you plan for your team during the employee's first week to acquaint him/her to everyone?
5. Have you blocked your calendar to spend with your new employee during his first weeks?
6. What types of tasks or projects could the new employee complete to secure "quick wins"? How and when will you initiate this?
7. When will you introduce the new employee to key players across the organization? Who are the key players?
8. Does the new employee need a company car, credit card or other items?
9. What types of training are offered or required? When will the employee attend?
10. What can you do that would *really* welcome your new employee to the team?





# CHAPTER THREE

## 6 EASY WAYS TO MAKE A NEW EMPLOYEE FEEL WELCOME



# 6 EASY WAYS TO MAKE A NEW EMPLOYEE FEEL WELCOME

The person who leads New Employee Orientation is kind of like a mother bird. After connecting with each of the new employees during Orientation, she steps back and watches those baby birds take off on their first solo flight. Momma Bird is confident in their technical ability, but the worry is in how those baby birds will navigate the organizational culture. How will they learn all those little nuggets that seasoned employees will admit, “I wish someone had told me that when I first started...”

But those new employees have a guide to help them with those things, and much more. Their hiring manager.

The person who was by their side through the interview process, and saw something in that person that would be an asset to the team. Things will be just fine for those baby birds.

Every now and then, however, a manager doesn't really know what to do, besides toss some files at him and tell the new employee to study some projects, read some emails or passively shadow someone on the team. Those new managers just need a little guidance (and sometimes a kick in the pants).

## **Here are 6 easy ways to make a new employee feel welcome:**

1. Get to know the new employee personally; meet him for lunch a few days before his start date.
2. Assign a “buddy” for the new employee to work alongside for the first few weeks (prepare the “buddy” for this!)
3. Help the new employee set productive, SMART goals early. Help him feel like a contributing member of the team!
4. Meet your new employee for coffee or breakfast on his first day. Set expectations and calm his nerves!
5. Personally introduce him to key individuals in the organization.
6. Be available during his first days...make him your top priority!

# Make it real

**Use the space below to reflect on how you can provide a more welcoming environment for your new employees:**

1. What are you doing today that sends a warm, positive message to new employees?
2. What are you doing today - maybe inadvertently – that sends a disengaged message to new employees?
3. How can you involve the rest of the team in the welcoming process?
4. How can you start building a relationship with a new employee prior to his start date? Or on the morning of his start date?

***Be honest...what feedback would a new employee give you about the welcome he received? (Hint: it's okay to ASK for that feedback!)***

# CHAPTER FOUR

## 20 QUESTIONS YOUR NEW EMPLOYEE SHOULD BE ASKING YOU...SO BE READY



# 20 QUESTIONS YOUR NEW EMPLOYEE SHOULD BE ASKING YOU...SO BE READY

## **You don't know what you don't know.**

It's as simple as that. I say this all the time when talking to hiring managers about bringing new employees on board. Seriously...all the time. For a veteran manager, it's easy to take for granted the little things that just come with time. But for a new employee walking in the front door on his first day, he just doesn't know what those little things are. HR, or whoever owns the onboarding process, will naturally cover some items. It's quite likely, however, that these items will be discussed at a fairly high level since many times Orientation attendees make up a melting pot of roles, departments and needs. It's critical for the hiring manager to be a key stakeholder in the process.

Of course, in many cases, the hiring manager is the go-to person for coordinating much of the on-the-job training that will help the new employee get started in his role; whether the manager is delivering the training, or if he is delegating this to someone else on the team. To supplement that on-the-job training, communication is essential to build a relationship and provide context and understanding.

Hiring managers must be prepared to answer these basic, yet often overlooked, questions. If your new employee does not ask, chances are he would appreciate the answer.

So tell him.

## Can you answer these questions?

1. Is there someone on the team who could be my guide/mentor/buddy during my first few weeks?
2. Will I need to order business cards, stationery, etc? How is that done?
3. What conference rooms are nearby? Which ones do we typically use for meetings? How do I reserve a conference room?
4. Who is the “go-to” person in the organization when you really need something done?
5. How do I open an IT ticket if I have an issue?
6. Where can I ship packages? Does my mail get delivered to my desk or to a mailbox?
7. Who is responsible for ordering office supplies for our team? Are there any request guidelines?
8. What is the business travel and expense policy?
9. Where is our team’s meeting place for emergency evacuations?
10. What is your vision for my role...in 3 months? 6 months? One year? Long-term?
11. What projects have highest priority right now? How can I help with those projects?
12. Who do I contact with IT issues? Is there a Help Desk or ticket system?
13. Which departments do we interact with frequently throughout the organization? How do we interact with them? Who will be my primary contacts in those departments?
14. How do you prefer to communicate – email, IM, text, phone, in-person?
15. Who should I add to my IM contact list from other departments?
16. What industry resources will help me learn more about our company and industry?
17. Where does the team like to go for lunch? What time does everyone normally go?
18. Where is the closest printer? How do I get that set up?
19. Do you have a preference for my work schedule/hours? Is there a work-from-home policy?
20. What is our department dress code?

There you go. 20 questions that will be the gateway to faster productivity and open communication for the new employee and his manager. 20 questions to start understanding the team dynamics. 20 questions to learn some of the quirks and nuances every organization undeniably has. 20 questions. Be ready to answer them.

# Make it real

After reviewing the 20 questions, use the space below to reflect and take notes:

1. Which of those questions are most likely to be asked in your organization?
2. Which questions would you be unable to answer, if you were asked today?
3. What other questions could you anticipate that would be specific to your new employee's **role**?
4. What other questions could you anticipate that would be specific to your **team/department**?
5. What other questions could you anticipate that would be specific to your **organization or industry**?

***Be honest...anticipating these questions can make your job easier, and provide a more welcoming environment for your new employee. How can you incorporate these topics into your preparation plan before the new employee's arrival?***

# CHAPTER FIVE

## 3 LITTLE WHITE LIES YOUR NEW EMPLOYEE IS TELLING YOU





# 3 LITTLE WHITE LIES YOUR NEW EMPLOYEE IS TELLING YOU

Have you ever attended a meeting or training session, when the leader or facilitator asked, “Does anybody have any questions?”

And you do, in fact, have questions. But you don’t ask.

I think we’ve all been there. For one reason or another, we don’t always speak up when we are unsure about something. Or maybe we don’t feel comfortable admitting that we don’t already know what we’d like to ask. Call it insecurity, or wanting to look like we’ve got it all together, but we walk out of those meetings and training sessions without clarity, lacking information that would make our jobs easier.

Now friends, let me ask you. **Has this ever happened to you when you were new on the job?**

Chances are, at some point, it has. Have you misled your boss into thinking you understood something, when really, you were full of questions?

**Put yourselves in their shoes, hiring managers. What question is your newest team member NOT asking?**

The title of this chapter might have made you think I was going to write about lying on one’s resume...or a new employee leading you to believe he has “expert proficiency” with Microsoft Excel during the interview process, only to find out he doesn’t know a cell from a pivot table. That’s not where I’m going. I’m talking about the little cues you can pick up on that might indicate your new employee is lacking knowledge, context or clarity. Here are three to consider:

## 1. “I don’t have any questions.”

Like I said before, sometimes a new employee just doesn’t want to admit weakness. That he isn’t fully understanding what’s going on. As hiring managers, we need to see beyond the lack of questions and anticipate the questions they might have...or don’t claim to have.

### ***What’s the solution?***

Offer an abundance of easy-to-use resources that will help new employees learn and locate information on their own. Create job aids, post FAQs, encourage dialog through social platforms. Leverage channels that work for your team and organization. The key is to make it easy. The idea is to provide answers and clarity...not to add to the noise and confusion.

## 2. “I did the same thing at my last job.”

Even though people know that a new job will be different than their last one, we still compare experiences, tasks, resources and even people – particularly when the role is similar. While this isn’t necessarily a lie, it does give us an opportunity.

### ***That opportunity?***

Provide context. It’s our job as facilitators of learning (that includes you, hiring manager) to help new employees understand the company. Understand the dynamics of the team. Understand the expectations of his role. It’s all about making it real and differentiating this job from the last one. In time, your new employee will put his past behind him. Until that day comes, you need to be there guiding his new path.

## 3. “I can do this on my own.”

Productive autonomy sends a signal of competence. New employees want to hit the ground running. They don’t want to be micromanaged, and they certainly don’t want to appear like they aren’t able to get the job done. It takes a leader who is tuned in to the needs of his team, to understand the balance of stepping back...and stepping in.

### ***How can you offer support?***

As a wise man once said, “Stop, collaborate and listen.” Take a lesson there, friends. Listen to your employees. Connect them with others for projects, when it makes sense. When it’s more logical to work independently, encourage them to do so, ensuring they have the necessary tools and resources available.

But all along the way, through collaborative and autonomous work, you should be communicating regularly with each of your employees, particularly your newest ones. Give context. Set expectations. Ask questions. Provide (and request) feedback. Keeping the channels open from the beginning will only lend itself to stronger relationships for the long haul.

Just like a parent must look beyond the “half-truths” their children dish out, a manager needs to look beneath the surface of what a new team member is telling you. It’s not that they are actually “lying” to you. They are in a delicate position of proving themselves and demonstrating proficiency...when they are simply trying to figure it all out.

Understand that. Accept that. And then do something about that!



**“Everything you do...or don’t do...is being absorbed by your new employees.**

**Believe it.”**

- Unknown

# Make it real

**What “little white lies” might your new employee be telling you? Use the space below to reflect and take notes:**

What questions do employees in your department typically ask? How can you educate a new employee in these areas?

What is confusing about your department ? What types of tasks, processes , office politics or computer systems would be foreign to a new employee? How can you help?

What tools and resources are available for employees to self-learn?

How can you balance autonomous and collaborative work?

***Be honest....would your new employee feel uncomfortable telling you he doesn't understand something? If so, how can you change that?***

# CHAPTER SIX

## 5 ONBOARDING RULES FOR HIRING MANAGERS



# 5 ONBOARDING RULES FOR HIRING MANAGERS

**A strong relationship between a new employee and his manager is imperative to long-term success.**

The thing with many hiring managers is, while they have good intentions about bringing a new employee on board, they often just aren't sure about their role in the process. The purpose of this eBook is to open those managers' eyes to the sheer importance of their role, as well as to demystify the process.

It's really not that difficult. In fact, it can be broken down into 5 simple rules:

- Rule #1** – Create connections
- Rule #2** - Provide content
- Rule #3** - Build context
- Rule #4** - Communicate
- Rule #5** - Focus on your customer

Contact [phase\(two\)learning](#) for more information on the **5 Onboarding Rules for Hiring Managers** workshop!

**Hiring Manager, you are the link between your new employee and finding success in his new role.**

You.

Not HR. Not the guy in the neighboring cubicle. Sure those folks play a part, but the bulk of the responsibility falls on you. You are the link. And if you don't work at it, you can also be the downfall. So, be the guide. Be the coach. Be the manager you'd want to work for.

Build them up, Buttercup.

# Make it real

**In the space below, reflect on your role as a Hiring Manager, and how you can embrace the responsibility of onboarding a new employee:**

1. How have you helped to build a solid foundation with a new employee?
2. How do you enhance the onboarding experience?
3. How can you be more effective at onboarding your new employees – what is your action plan?
4. Who can you share this action plan with? How can they hold you accountable?
5. What has been your biggest takeaway from this eBook?

***Be honest...have you been a roadblock for a new employee? How did this occur? How will you prevent this from happening in the future?***

# WANT TO LEARN MORE?

*Contact us today!*

Need help crafting an onboarding strategy? Looking to engage hiring managers and other stakeholders in your organization?

**phase(two)learning can help! Services include:**

- Onboarding Audit package
- Onsite Workshops for Hiring Managers – *5 Onboarding Rules for Hiring Managers*
- Onsite and public workshops for Onboarding process owners and hiring managers
- Customized Onboarding Strategy sessions
- Editing services for existing Orientation/training content

**Drop us a note. Let's talk.**

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# APPENDIX

## TOOLS & RESOURCES FOR HIRING MANAGERS



# Pre-boarding checklist

**Use this general checklist to ensure that you are prepared for your new employee's arrival:**

- ☐ Contact the new employee via phone after the offer has been accepted, both initially to congratulate him, but also periodically via phone or email to check in prior to start date
- ☐ Determine what the new employee needs to know to be successful in his role and to quickly become productive
- ☐ Schedule meet-and-greet sessions with key individuals and teams during his first week
- ☐ Define a training plan for any necessary on-the-job or organizational learning
- ☐ Identify milestones to use in expectation setting
- ☐ Prepare the new employee's workstation; order any necessary supplies
- ☐ Schedule lunch with the new employee on his first day
- ☐ Schedule a team gathering during the new employee's first few weeks
- ☐ Ensure that your calendar is open to be available for your new employee – schedule 1:1 meetings with the new employee – often – during his first few weeks
- ☐ Inform the team of the new employee's arrival; identify a “buddy” to serve as a guide during the first days/weeks on the job
- ☐ Work with internal stakeholders (such as IT, security or administrative staff) to ensure that the new employee has building access, parking arrangements or other logistical needs.

***What needs are specific to your team and organization? Use the blank checklist on the next page to make notes!***

# Pre-boarding checklist

Consider your organization and team-specific pre-boarding needs, and add them to your to-do list.

☐☐☐☐☐☐☐☐☐☐

# Week One Checklist

**Use this checklist to ensure that you are prepared for your new employee's first week on the job:**

- ☐ Welcome the new employee and escort him to the organization's Orientation session
- ☐ Provide helpful resources that might not be included in Orientation, such as a department phone list or organizational chart
- ☐ Conduct a tour of the building and department area, as needed
- ☐ Review IT procedures and ensure that the new employee's equipment and workstation is functioning properly
- ☐ Invite the new employee to lunch (or encourage others on the team to do so), or provide local recommendations
- ☐ Assist the new employee with setting up a printer, locating office supplies, etc
- ☐ Meet with the new employee daily during the first week – discuss expectations, answer questions, provide context, make introductions, etc
- ☐ Discuss the employee's "line of sight" to your Customer, and how his role and the team impact the Customer experience
- ☐ Review safety/emergency procedures (fire, evacuation, extreme weather)
- ☐ Discuss other processes and procedures relevant to your department
- ☐ Set expectations pertaining to schedule, working from home and other considerations
- ☐ Connect the new employee with those responsible for providing on-the-job training
- ☐ Provide and request feedback – often!

***What needs are specific to your team and organization? Use the blank checklist on the next page to make notes!***

# Week One checklist

Consider your organization and team-specific “First Week” needs, and add them to your to-do list.

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# Helpful Resources

The list below includes helpful resources to check out as you continue developing an onboarding plan for your new employees:

## LinkedIn groups:

- Onboarding Best Practices: Clearing the 90-day Hurdle
- Onboarding – Best Practices in Accelerating Employee Transitions
- Tools for the Time Crunched Manager

## Checklist:

New Hire: Audit Checklist for Onboarding/New Hire Practices (SHRM)

<http://www.shrm.org/TemplatesTools/Samples/HRForms/Pages/NewHireAuditChecklistforOnboardingNewHirePractices.aspx>

## Research Study Summary:

Onboarding 2013: A Look at New Hires (Aberdeen Group)

<http://aberdeen.com/aberdeen/public/view-lookinside-pdf.aspx?cid=8383>

## Whitepaper:

The New Business of Business Leaders: Hiring and Onboarding (Oracle)

<http://www.oracle.com/us/media1/business-leaders-hiring-onboarding-1657104.pdf>

## Article:

Onboarding: The Critical Role of Hiring Managers (workforce.com)

<http://www.workforce.com/articles/20070-onboarding-the-critical-role-of-hiring-managers>

## Article:

How to Build an Onboarding Plan for a New Hire (inc.com)

<http://www.inc.com/guides/2010/04/building-an-onboarding-plan.html>



**Partner with phase(two)learning to revolutionize the new employee experience in your organization!**

## About phase(two)learning:



phase(two)learning is a consulting firm that specializes in the development of onboarding programs for small and medium-sized businesses.

phase(two)learning was founded by Michelle Baker, a corporate learning strategist. Michelle has been a champion of onboarding and workplace learning for 15 years.



# How can phase(two)learning help?

Contact us today to learn more about our **Onboarding Audit** package, to transform the onboarding experience in your organization!

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