Onboarding That Optimizes Employee Retention

A 7-Step, 180-Day Framework That Works

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A 7-Step, 180-Day Framework That Works

Hiring
Dear HR Professional,

If you’ve ever felt as though you were being pulled in so many different directions some days that you needed a guiding light to find your way to success, here’s help.

That’s why we created the HR Morning Blueprint.

Each Blueprint focuses on a specific aspect of your role as an HR professional. It takes you deep inside, puts that aspect into proper perspective and provides a real-life how-to guide that can make you successful.

Each Blueprint is broken into four sections:

1. **The view from 10,000 feet.** An overview that gives you perspective.

2. **Success plan.** A detailed, step-by-step approach.

3. **Stumbling blocks.** A heads-up on the traps you need to avoid.

4. **Summary.** A wrap-up that emphasizes the key points of the Blueprint.

The Blueprints are researched and written by HR Morning’s veteran staff of managers and editors. We review hundreds of sources and read thousands of pages from leading authors, thought leaders, news outlets and research firms. We hand select the most useful content, distill complex theories and give it to you in a practical form that allows you to become a great HR Professional.

Curt Brown
Editor-in-Chief
Onboarding That Optimizes Employee Retention
A 7-Step, 180-Day Framework That Works

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The View From 10,000 Feet
Chapter 1
The View From 10,000 Feet

Why Onboarding
The Right Way Matters

Whether you are part of a small, family-run service provider, a global conglomerate – or something in between – a trusted and able workforce is among your most valuable assets.

Every business is only as good – and as successful – as its employees.

To get the best shot at a great workforce, some companies are able to pay higher-than-market salaries, give sign-on bonuses or offer other attractive perks.

But as many executives and hiring managers have learned the hard way, offering more money doesn’t guarantee a better hire.

What’s more, with many companies competing for the same top candidates, recruitment is time-consuming and a financial drain on resources.

So once you finally do bring someone on board, it’s wise to make certain you’re doing all you can to make your new hires successful.

One way to do that is by having a well-designed and well-executed onboarding process.

Get onboarding right, and your new hire will evolve into a successful contributor on your team.

Fumble it, and you miss tapping into that employee’s full potential, possibly costing the employee his or her job – and costing your company time, money and personal capital.
What Is Onboarding?

Onboarding is more than just orientation. It’s fully integrating employees into their new work environment, while helping them feel confident about the job.

Orientation is just one step in that process, focusing on standard details – payroll, benefits, policies, scheduling and who sits where.

Onboarding more broadly focuses on turning new hires into dedicated and engaged team members.

The onboarding process helps convey your organization’s brand and values, explains your professional culture, establishes institutional expectations, sets performance goals and gives new employees the tools to successfully adjust to their position.

What a company puts into its onboarding process should be tailored to its needs. Ideally, it should encompass the background and history of the company, the formulation of its goods or services, the development of its departments and subsidiaries and, most importantly, its mission for the future.

Why Does Onboarding Matter?

Consider these statistics:

• One in four employees changes their job each year.

• In Fortune 500 companies, it has been estimated that 500,000 new managers transition into new roles or companies each year.

• Managers begin new jobs every two to four years. Yet, it is also estimated that 50% of all senior outside hires fail within 18 months on the job.

• Research indicates that new employees get about 90 days to prove themselves in a new job. For hourly workers, turnover is a likelihood in the first 120 days, where approximately 50% leave their new jobs.
Blueprint: Onboarding That Optimizes Employee Retention

It Matters For Your Bottom Line

According to the Bureau of Labor Statistics (BLS), the cost for replacing an employee can be close to 50% of their annual salary. So, when you miss the boat on effective onboarding, it can get costly.

According to the Society for Human Resource Management, or SHRM, the cost of employee turnover can be as high as 90% to 200% of their annual salary. This cost is linked to shortfalls in operational performance and could result in reductions in customer satisfaction, company productivity and outright profit.

It Matters For Employee Longevity

Onboarding should be more than mere training. When support levels are high, new hires will likely have more positive attitudes. When support and direction are insufficient, the result is often unhappy and underproductive employees.

Studies show that if an employee stays with an organization for 18 months, the chances that person will remain with that company well into the future increases dramatically.

A study of 264 new employees published in the Academy of Management Journal found that for new hires, the first 90 days of employment (often called the probationary period) is pivotal to building rapport with managers and co-workers.

A 2015 TinyPulse survey of over 400,000 employees found:

• 24% felt they were less productive because they lacked the tools they needed to complete their roles and remain compliant.

• 15% noted that a lack of effective onboarding contributed to them quitting or considering quitting a job.

• 49% of millennials say that they’d like a better onboarding process.
A recent study by Bamboo HR found that:

- 43% of employees think that time and money are wasted on ineffective onboarding processes, and
- 75% of employees feel a thorough new hire orientation is worth the time and effort.

How Long Should Onboarding Take?

You might think a one- or two-week training program is sufficient for new hires. But that's where a lot of managers miss the mark. A sound onboarding process often will take months, and in some cases could go 12 months or more.

Some organizations try to reduce onboarding to a one or two-day orientation, when new hires are treated to breakfast and sit in a conference room to sign up for benefits and do folders full of paperwork. Others have new employees watch training videos on subjects like workplace harassment, employee financial benefits or company policy do’s and don’ts.

To be effective, onboarding takes patience, time and effort from both the manager and the surrounding teams. The communication, feedback and performance measurement included in onboarding will be critical to new employees' loyalty and their understanding of how they fit into the big picture.

So the onboarding process shouldn't be cut short. A study by The Aberdeen Group showed 76% of companies polled extended employee onboarding to more than one month. The process should take as long as necessary.
The Varied Roles In Onboarding

What HR Does

Onboarding really begins the moment the candidate accepts the job offer. As such, most of the administrative responsibilities of taking on a new hire depend on HR.

These duties include, but aren't limited to:

• Supplying the new hire with administrative information and forms to sign
• Introducing the new hire to compliance programs (such as dress codes, etc.)
• Explaining the company's benefits programs
• Explaining legal issues the new hire needs to know (such as mandatory drug testing, etc.), and
• Setting up access to the computers and other technology so the new hire can begin to meet co-workers (this often involves IT as well).

In addition to paperwork, HR staff can use the time between when the hire accepts the job offer and the start date to clarify any questions about the job. HR representatives also play a part in starting the new hire's socialization into the company. HR can also help others recognize the importance of the onboarding process. If you're in HR, you could consider assembling onboarding guidelines for other department managers.

What The Manager Does

An employee's direct manager or supervisor plays a critical role in making sure the new hire has clarity about the job role and performance expectations. It's the manager's job to align the new employee's individual duties with those of other employees, and help the new hire set some initial goals.
Managers and supervisors also:

- Coordinate with department staff to arrange a work space for the new employee.
- Connect employees to colleagues through introductions, email lists, phone lists, etc.
- Clarify key expectations up front, in writing, such as important deadlines and schedules.
- Conduct regular one-on-one meetings to see how the new hire is adapting.
- Provide timely, information-specific coaching on specific duties.
- Explain the context of departmental, unit and job-related duties and share any technical expertise that’s necessary.
- Inform new hires about any key departmental goals.
- Set up mentoring and feedback plans for the new hire.

**What About Co-Workers?**

Companies should encourage relationship-building with new hires right from the start. Introducing select co-workers early in the onboarding process gives new employees a chance to bond before they get down to the nitty-gritty of learning their jobs.

Both HR departments and managers should help new employees get more comfortable with co-workers. Proposing a team meeting or a casual lunch to meet co-workers is one way to do this. The focus should be on encouraging employees to connect with each other across departments.
What About Mentors?

A Bamboo HR study found that 37% of managers and employees say a mentor is the most important aspect of new hire orientation. It’s ideal to assign the mentor before the new employee starts. The new employee should be matched with someone who has enough experience to guide the new hire in the day-to-day details of the job. The mentor can also serve as a “work buddy,” giving the new hire insider advice on what to do and what to avoid while on the job.

A Strategy for Successful Onboarding

Establish a strong employer welcome. This includes introducing the new employee to department co-workers and those in higher management, and drafting a company-wide email message introducing the new employee.

Affirm the employee made the right job choice. This includes reviewing the details of the new employee’s position and fielding any questions the new hire has. This could also include meetings with managers or other co-workers to generally reaffirm the needs of the position the new employee was hired to do. Employees could further explain to the new hire any technical details they’ll need to know, the resources they should use, and any other information.

Create a clear picture of how the employee fits into the organization as a whole. This includes a review of the history of the company, the development of the department the employee will work for, and a breakdown of how their job fits into company goals.

Set the stage for long-term relationship building, and retention. This could include future opportunities for mentoring and development. This should give employees an avenue to improve the skills they’re learning for the first time.
It's All In The Approach

How do managers know the best methods to apply to their onboarding process? The answer is as varied as each business or organization. Some companies prefer a structured approach with itineraries and schedules. Others follow more of a free-form method, allowing new hires to go at their own pace in on-the-job learning and getting to know other employees.

Onboarding can vary in formality, scheduling, how many hires are on boarded at one time and how many people assist in the process. The key is developing an onboarding experience that doesn’t take too long, but also isn’t so brief that it leaves new employees floundering.

In Chapter 2, The HR Morning's Onboarding Framework To Optimize Employee Retention will offer you the steps and tools you need to develop an effective onboaring process that works to ensure long-term employee retention – and happy new hires.
A solid onboarding experience begins with the basics of welcoming the new employee into the company. This should include the introduction of the new hire to the company (including all personnel and the various departments and entities it represents).

The experience should also include introducing the new employee to their position in a complete step-by-step manner. The keys to make sure these introductions run smoothly rely on three crucial onboarding concepts, which can be tailored to fit your own organization. They are:

1. **Skills**

   No one becomes an expert on their first day. The same goes for your new hires. Breaking down the learning process into manageable increments of about 30 days allows new employees to focus on learning certain skills at certain times.

2. **Stages**

   Implementing a strategic plan clearly communicates to your employee the onboarding stages. They'll understand where they'll start, where they're going and what they'll learn along the way. And employees value transparency because a clear direction lets them know what's expected.
3. Scheduling

It might seem counterproductive to schedule every onboarding step with a specified time and duration. But laying out a plan gives new employees a handy roadmap to follow. Your itinerary can be flexible (such as switching a few time slots around) but for the most part, it actually helps both you and the new hire to have a set idea of what he or she should be focused on hour-by-hour, and later on, day-by-day.

Remember The Four Cs

A successful onboarding plan can be designed around these four C’s: compliance, clarification, culture and connection.

1. Compliance

One of the first stages of any effective onboarding program is to help new employees understand both legal- and policy-related rules and regulations. This is usually managed by HR in the very first days of the onboarding process, and in many cases can be maintained by using a software program for state and federal requirements.

2. Culture

Effective onboarding should help new employees understand the company’s mission, values and organizational norms. Knowing the company culture makes employees feel that their work is valued and starts new hires off with a specific mission. In a 2015 Achievers survey of close to 400 full-time U.S. employees, 61% didn’t know their company’s mission or cultural values and 60% didn’t know their company’s vision. Further, the survey found companies with engaged employees outperform unengaged companies by 202%.
3. Connection

This step can sometimes be difficult to implement without feeling “forced.” But it’s critical to put newcomers at ease in their new setting. In a 2015 Virgin Pulse survey, 40% of employees said getting along with their co-workers was the one aspect of orientation that meant the most; 66% said they felt it improved their productivity. It can be as simple as creating small situations where your new hire can get acquainted with co-workers, even if they’re not in the same department.

4. Communication

Studies show that 68% of employees believe the frequency of communication in their workplace directly impacts their job satisfaction. If your onboarding plan amounts to little more than “here are some forms, go fill them out, then you can get to work,” it shows a lack of willingness to communicate, and new employees will notice. Give them a formal welcome and assign someone to help guide them through their first days. Discuss early expectations, answer questions the new hire might have. Goals and expectations that may seem commonplace to existing employees need to be clarified to new hires, along with how their roles impact the company.

Onboarding Best Practices

No matter the size of your company, or how frequently you hire new employees, if you follow these generally held best practices, you’ll likely make the most of the onboarding experience, both to the company’s and the new employees’ benefit.

• Take care of basics prior to the new hire’s first day on the job, such as setting up workstations, having key cards ready, and other details
• Make the new hire’s first day on the job special in some way,
with a department lunch or introductory meet-and-greet

• Introduce the new hire to each department, and brief them on what each department does

• Follow written onboarding plans that already exist and tailor them to best fit your company or department needs

• Be clear in terms of who plays what role in the onboarding process, and make sure those who are involved know their roles

• Have a formal orientation itinerary designed so that other employees can access it and know their roles ahead of time

• Engage other employees and managers in onboarding strategies, and get them to be active participants when needed

• Use technology to help the process when necessary, and

• Implement your onboarding plan consistently, so that all new hires take away the same experiences and understanding of company culture.

A 7-Step, 180-Day Onboarding Framework

What follows is **HR Morning’s 7-Step, 180-Day Onboarding Framework** to ensure managers provide an effective and engaging onboarding experience for new employees. The more specific you tailor your onboarding process, the more likely you’ll leave no stone unturned in training and integrating new employees into the company fold.
Step 1: Establish Expectations

Effective onboarding establishes up front that there are expectations to be met. You’re welcoming a new employee into a new work environment, not a new member of a club. It’s understood that the goal of onboarding is to get the new employee off to a solid start in doing what you hired him or her to do.

What should your company’s expectations include?

- That the new hire will learn and understand the details of his or her new position and information on the company overall;
- That the new hire will ask questions and seek out information when necessary on how to do the job;
- That the new hire will willingly work to adapt to the company culture (e.g., following expected attendance policies, dress codes, etc.);
- That the new hire will adjust to the workload and be consistently meeting incremental expectations from his or her supervisor(s).

Just as you have expectations for your new hire, he or she should also have expectations with regard to the new position. The new hire has, after all, accepted a job based on several interviews and an agreed-upon standard of employment.

What should a new employee’s expectations include?

- To be introduced to the new job and the other key employees he or she will interact with;
- To be given an adequate space and the proper tools and training, if needed, to begin work;
- To be familiarized with the rules and regulations he or she is expected to comply with;
• To be actively involved in planning projects and assignments he or she is responsible for;

• To be aware of how the position intersects with the department and company as a whole.

**Step 2: Plan Ahead (Before The New Hire’s Arrival)**

There are several common-sense things you can do ahead of time to ensure that things run smoothly on your new hire’s first day.

**Set up your new hire’s workstation**

Make sure all necessary equipment works and gather basic office supplies for the new hire’s desk. Also make sure the work area is clean (free of leftover paperwork from a previous employee, trash, etc.).

**Prepare a new-hire binder**

Assemble a document binder that includes general company information, such as a map of the building/department locations, a phone list, instructions on setting up voicemail boxes, email settings, necessary passwords and log-in information. This could also include sign-in/sign-out processes, lunch parameters, vacation/sick time rules, and any other internal policies or team-specific policies. If applicable, include a list of any internal identifiers or definitions the new hire will need to know.

**Prepare paperwork the new hire will need to sign**

Typically, most onboarding paperwork the new employee will need to sign is handled by the HR department if it involves payroll, insurance and other issues. Have those and other items that are specific to the employee’s job assembled together so the new hire can read them over before signing.
Step 3: The First Day

The first day on the job is one of the most important for a new employee. Other than the first impressions the employee received during the interview process, this is really where your company makes an impact. Despite some natural initial awkwardness, what happens on an employee's first day sets the tone for continued enthusiasm for the new job. The first day should include these components:

1. It’s important that the new employee is greeted warmly and quickly upon arrival on Day One. You've likely selected the start day for the new hire, so it’s key that you, as the manager, and anyone else who will play a role in this early onboarding stage is ready to get the new hire started. Make sure that at least a majority of the key players are available in the office (and aren't on vacation, etc.) on the first day.

2. It’s critical that the new employee has a clean, functioning workstation as soon as he or she begins. New hires want to feel that they’ve got a place to call their own. This also sends the message that you’re ready for them to begin working. Having to hastily clear out a work cubicle or find an available desk and computer gives new employees the impression that you’re either not prepared for them, or worse, that they’re an unimportant addition to the company.

3. The employee’s first day should also include a welcoming lunch, either outside the office or in the company kitchen if appropriate. It doesn’t have to involve the entire department, but should include enough people to make the occasion seem special and help the new hire feel more relaxed. Eating lunch alone can feel lonely for employees who don’t know any of their peers, so taking that initial stressor away for their first day helps put them at ease in a new environment.
4. Day one should also include presenting the new hire with a detailed schedule or itinerary for the first day or first week (or both, ideally). Naturally, a new hire on his or her first day will literally not know where to begin; no assignments have been given and the “job,” as such, hasn’t really started. A schedule of things to do on their first day gives new hires a sense of purpose for the initial phases of the job.

5. New hires’ first day should also include a tour of the office. Point out exits, bathrooms, kitchen locations, the office supplies closet, mailroom and libraries. Also note places where employees tend to gather and areas they can use for some privacy throughout the day. If your company is large enough to warrant it, do an overall tour of different floors, wings and warehouses to give the employee perspective on the company as a whole.

6. Assign the new employee a “contact person.” This is different from a mentor or someone to shadow. This should be a peer, someone who new employees can ask for help on general issues if their supervisor isn’t available.

**Make Introductions Fun**

One fun way to make employee introductions more memorable and meaningful is to create a “Welcome A-Board.” Pick a funny theme (say, a popular TV show or Internet meme) or a hobby the new hire has (if it comes up in an interview) to base it on, and design the photos and information with it. Prop the board up in the new hire’s workstation in time for his or her first day. Depending on the size of your department, you can go either big (use a corkboard with pictures of employees with names and a bit about them, with some friendly welcome messages) or small (have department employees sign a large card or poster with their names and welcome messages).

Letting new hires see the Welcome A-Board prior to making individual introductions is a fun way to put them at ease. Not to mention, it will provide some icebreakers when the new employee is taken on the usual introduction “tour” of the office.
Step 4: The First Week

After the first day, the rest of the employee’s first week should follow as closely as possible the itinerary presented to the new hire and any others who are involved in initial orientation phases. Following an initial schedule for the first week gives new hires specific things to focus on learning and understanding, so they don’t feel overwhelmed.

The following steps can be incorporated in part during Week One:

Go over the set expectations

Review what they were hired to do and spell out what will be required, at least initially. For example: a new hire in a marketing department would be responsible for producing a new press release daily based on provided information, and for proofing other releases submitted every other day. It’s OK to get specific; once people begin working and get into an established routine, specifics will obviously be less necessary.

Review the responsibilities that are part of the job

You can’t expect the employee to sit down and immediately begin job tasks unless you’ve supplied specifics on how to do them. It’s important to start off small – but not too small. Statistics show that many new employees decide to leave a company early after their hire because they didn’t feel challenged enough. So give them enough work to dig into for that first week. Conversely, it’s risky to follow too much of a hands-off approach, where the employee gets a lot of work really fast, but isn’t given much guidance on what to do first.
Assign a mentor

Early-career Millennials job-hop twice as much as new graduates did 20 years ago, and mentor programs have been shown to have a positive effect on keeping new hires. Mentoring helps build meaningful connections, helps new hires work through frustrating tasks and minimizes backslide in their first years of employment. There are different types of mentors:

• Peer mentors. Assigning a mentor to someone who has a similar age and experience level will help them feel more comfortable. A recent college grad, for example, will probably feel more at ease and have more in common with a mentor who is close in age and has similar job experience; more seasoned hires may feel more natural with a peer mentor who is close to them in work experience.

• Veteran mentors. If your new hire could use someone with key experience as a mentor, assigning a mentor who's a veteran in the department or company could be a smooth way to get the hire adjusted to the job and feeling like he or she is in experienced hands. This depends on the amount of practical experience the new hire has and on how complicated the new position is.

• Independent mentors. Rather than pair new employees with someone who will work closely with them, it could be a better fit to enlist a veteran employee to be a short-term “touchpoint,” who can answer any questions the new hire has or just check in to see how they’re faring at the end of each day.
Shadowing

This is an important step in getting the new employee accustomed to a regular routine and can resolve a lot of initial questions.

Assign a person the new hire can “shadow” for a specified time; this should be someone who has similar duties and has enough experience on the job to get the details right. The new hire should shadow the employee to meetings and actively watch the employee perform the processes of the job. Once enough time passes and the new hire gets the hang of things, the assigned employee can then become the “shadow,” watching the new hire perform job tasks and correcting when needed.

Get them involved

As stated, you don’t want to dump too much on a new hire within the first week; information overload can be intimidating. But you should introduce company teams, committees or initiatives that the employee might be interested in joining. For example, mention the company softball team, networking groups, social or community projects the company participates in, or committees within the department or company.
Select the Right Mentor

Every manager’s likely got one on their team – the multitasker, the dynamo, the person who barely has to be told what to do before getting it done. The employee you’d love to clone. So when it comes time to select a mentor for your newest employee, you naturally gravitate to your star standout.

Not so fast. Your top guy or gal may be a whiz at the job, but not so much in the mentoring department. The wiser step is to choose an employee who exhibits patience and has a gift for being able to teach.

Ford Harding, founder and president of Harding & Company, a firm that helps professional service providers win new clients, says it’s natural to want to turn wonder-workers into mentors. What organization wouldn’t want their rookies to learn how to emulate the legend?

But eagles and rainmakers can make lousy teachers, Harding points out. For one, they’re often too busy doing the job they’re so good at. They also could tend to think his or her way is the only way. After all, it works pretty well for them, right? Also, Harding says, rainmakers can be impatient when waiting for a new recruit to understand the job. “They can forget that they were once at the stage their mentee is,” Harding says.

However, if your star employee expresses an interest in mentoring, that’s a different story. Just make sure they know the parameters of what they should instruct the new hire to do. Supply a checklist of tasks or projects to teach, and encourage the mentor to stick to the onboarding plan.
Step 5: The First Month (The First 30 Days)

During the first month, new employees will still require assistance on most projects, but should be getting more of a feel for how to do his or her job with little or no assistance. In order not to lose the momentum the employee is gaining in learning the ropes, there are several touchpoints still required of the new hire’s supervisors and/or mentors.

Set up daily or weekly meetings for informal follow-up

Depending on the job position and the experience the new hire already has, daily meetings may not be necessary. But informal weekly meetings can both help the employee ask necessary questions (without seeming like a pest) and help you as the manager to see if there’s something the employee is having trouble with early on.

• Discuss the on-the-job experience so far. Does the new hire feel comfortable in the position? Is he learning the jargon and the networks required to do his job on a practical basis?

• Discuss concerns or any questions the employee might have. Is there an aspect of the position the new hire doesn’t grasp? The first month is the most critical time to reinforce that there are no stupid questions. Encourage employees to speak up if they’re not sure about how to get a task accomplished or what their specific expectations are. Otherwise, they might stay silent for fear of being judged – and go a month or more on the job unsure of how to work successfully, which could set them back.

• Discuss any added resources or tools the employee may need. Not everyone with the same job works the exact same way. Some employees prefer large computer screens to a more portable laptop, for example. Some may find their workstation too hot or cold, or in an area given to noise or other distractions. Encourage the employee not to be shy about mentioning what could help them better do the job.
Do a mini-evaluation

You’ve likely given the new hire some work or a project to start on within the first month, whether it’s a small independent assignment or a way to contribute to an ongoing project. Once it’s completed, note it for the new hire and offer some praise for their first achievement, no matter how small. Not only will this make the new hire feel more confident, it will also reinforce the type of job he or she should be getting used to doing.

Broaden goal setting and incentives

After the new employee has accomplished several small goals well enough to move on, discuss adding some longer, more difficult assignments or projects. Your employee should now feel a bit more confident in taking on more work and probably doesn’t need help with basic tasks.

It’s Important To Document Progress

Managers should include documentation of the progress the employee is making throughout the new hire’s first month. This helps you keep track of how the employee is learning and adapting to the job, and also provides a reinforcement for HR and other related departments who will need to work with the employee in specified areas.

Draft a memo documenting some of the projects and learning activities the new hire finishes and have the employee initial it with the date.

Depending on the size of your company and the nature of the company's business, you as manager should decide what to include in these weekly progress reports, which should then be added to the employee's HR personnel file.

Even if the employee is faring well so far, charting his or her progress (or lack thereof) could be a necessary tool should problems arise with the employee's progress down the road.
Step 6: The First Three Months (The First 90 Days)

The focus of the first three months, particularly the last 30 days, is about removing the guardrails the employee needed for the first few weeks on the job.

As the employee takes more on and finishes larger tasks, you can hold them more accountable for their own work. Your new hire should now be able to tackle projects with limited guidance from you, and should be ready to assume bigger responsibilities.

During the first 90 days, meet with the employee several times to:

- Discuss the new hire’s experiences and how they match his or her expectations.
- Review progress made toward initial goals, and adjust them if needed.
- Discuss concerns, questions or issues the employee may still have.
- Provide some feedback on the employee’s performance to date and solicit feedback from the employee on how he or she feels things are going.
- Solicit feedback from the employee about the onboarding process and their suggested changes. (Provide this information to HR.)

In addition, the first 90 days should also include more pointed steps to help influence the new hire’s growth in their position and in the company.

Hold a personal goals session

Allow the employee to review his or her personal understanding of their role and what they should be aiming to accomplish for the near future. A good idea is to have the employee come with a list of incentives or ideas that would help them consistently do their job better. Your list for the employee should outline things to focus on in upcoming months.
Assess the employee's role

Are there aspects of their job duties that need to change for some reason? Are there things the employee does particularly well that could prompt a larger role in those areas? Has some aspect of their job position or the dynamic of their department changed that could allow for changes to their role or duties? (For example, assuming some of the duties for someone on leave, or a large project that needs the entire department’s participation.)

Follow up with co-workers for feedback

Check in with the new employee’s colleagues to gain different perspectives on how the new employee is adjusting. There could be small issues the new employee will reveal to co-workers before coming to you, their manager, for fear of judgment or disapproval.

Reinforce participation in activities

The new employee was probably told about department or office activities and perhaps was invited to participate, but might have felt unsure about joining after just being hired. Remind new hires about activities like company volunteer initiatives, sports teams, book clubs, etc. Participation in activities like these is an easy way to increase the new hire’s sense of belonging and job satisfaction.
Step 7: The First Six Months

Even with the best onboarding plans, it takes time for new employees to become fully comfortable at a new job – and even longer for them to truly fit into your company's culture. So the first six months are critical.

At six months, many managers like to take time out for a half-year performance review of some kind. Some company’s HR departments or onboarding programs make this a prerequisite for their managers, and have it coincide with a small bonus or pay increase if warranted.

Whether you do a formal performance review or not, there are still incremental steps you can take to increase the new employee's involvement in work and help him or her gain more experience.

Provide a six-month performance evaluation

List the new hire’s achievements so far, and any goals or next steps to be reached at the one-year mark. This gives the employee an honest assessment about what he or she does well and has achieved, along with what he or she could improve on.

Introduce a bigger role

If all is still going well, open the employee up to expanding his or her job. For example, tasks the employee might have been too “fresh” to do before the six-month mark – attend conferences, represent the department at a meeting, draw up a department-wide report – might now seem like a good place for the new employee to start.
Give the employee a “special” task

Take some small chore or one of your own tasks that you never delegated and let the employee take charge of it. Things like managing the department library, circulating time sheets or updating certain files might seem like mundane duties, but they need to be done. Having a responsibility that no one else has encourages the employee to take ownership of his or her job.

Ways to Measure Employee Performance

Overall, the onboarding experience should be designed to not only get the employee off to a good start, but also to help you assess the return on investment you can expect from your decision to hire that employee.

The 2014 Global Assessment Trends Report found just 50% of respondents use talent metrics to study an employee’s ROI, and only 45% use objective measures of potential in onboarding plans to guide development and succession plans.

Ultimately, your onboarding process should make the most of the opportunity, early on, to coach your new hire effectively.

Your top goal is to have the employee end the process confident in his or her ability to perform the job in the best way possible. In that respect, you will be able to confidently return to your onboarding process for future hires, knowing it will start new employees on a path to success.

To that end, you want to make sure your process includes clear methods to do the following:

Develop a standardized tool to assess the employee's quality of work

This could be a grading numerical system to measure how quickly the employee mastered new tasks, how the employee showed initiative on new tasks, and how the employee met deadlines or expected turnaround times for work.
The descriptions you use for grading should be as specific as possible to the job duties. Most positions allow for generalized grades, such as a numeric scale, a letter grade scale, or descriptors such as “poor,” “excellent,” “satisfied,” etc.

Focus on three key areas: performance, experience and effectiveness. Factor in the impact the new hire’s work has made on their teams, as well as the impact your organization sees as a whole.

For example:

<table>
<thead>
<tr>
<th>Employee (30, 60, 90, 180, 360 days)</th>
<th>Team (Quarterly)</th>
<th>Organization (Semi-annually)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Progress milestones</td>
<td>Change in overall productivity</td>
<td>Headcount vs. output</td>
</tr>
<tr>
<td>Experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee satisfaction</td>
<td>Impact on team morale</td>
<td>Cultural fit vs. retention</td>
</tr>
<tr>
<td>Effectiveness</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New hire time to proficiency</td>
<td>New hire time to proficiency vs. team average</td>
<td>Impact on retention (both quits and terminations)</td>
</tr>
</tbody>
</table>

List what the expectations were and how well they were met

These should be written down in a sort of job description to go over with the employee throughout the onboarding process, and would likely include more than what was presented during the job interview. Start with the general set of expectations that cover the new employee’s job position, and then add in any specifics that you as the manager would expect from the new employee.
Create a survey for new employees

Ask them how they feel they're meeting expectations and goals.

This is a step that’s often shortchanged in onboarding. If the new employee feels he or she is doing just fine in working toward expectations and goals, and you as the manager think there’s a lot of work to still be done, they may have misunderstood what those goals and expectations were in the first place. The most effective way to have a new employee address his or her own progress so far is to use the same or very similar language that you and other managers used in assessing the employee. Also, it helps to use a scale similar to the one you use; a numeric rating, letter grades, ranges of “poor,” “satisfied,” “excellent,” etc.

Compare results to goals

Much like court case testimony, ideally there should be no surprises when managers compare their assessment of new employees’ progress to the employee's assessment. If you feel the new hire is still struggling to get the hang of some duties and needs further help, but the employee thinks he’s passing with flying colors, there’s a disconnect that needs to be fixed. If your onboarding process uses the time intervals detailed in this Blueprint effectively, you’ll more often than not catch those disconnects early on, so the new hire doesn’t fall behind.
Some additional ideas

Additionally, there are other methods you could use to determine if your onboarding process is effectively steering your new employees toward future success:

Create training programs

Training programs for future positions can help employees perform at the most optimal level for your company and can foster longevity. But it’s important to use training programs that directly relate to your business, or you’ll end up spending a lot of money and employees’ time teaching them things they can’t directly apply to their jobs. Sending new hires to professional development events, bringing in industry leaders for lunch-and-learns, and other opportunities should be based on what’s most necessary for optimal training to justify any costs.

Measure training success

Once you pilot a training program, begin measuring its success. How many employees participated in both smaller sessions of 1-2 hours, or are choosing the more formal training? Are employees able to apply what they learned to their work? Have employees who participated fill out a survey on how helpful the training sessions were as quickly as possible following the program.
Switch annual reviews to quarterly

Saving a performance review for discussion only one time per year might not be the best way to go for new hires. Instead, for Year One, opt for quarterly performance assessments. This helps new employees get a better grasp on how meeting goals for each consecutive quarter contributes to benefits for the company overall. During each review, evaluate the goals that have been set for the employee. Whether or not an employee is meeting those goals might tell you if the goals were too unrealistic for a rookie hire. Or conversely, it could be time to add new goals if the new employee is meeting the set ones ahead of schedule.

Ask employees to teach what they’ve learned

This is sort of a different approach to mentoring, and one of the best ways to get feedback on how your onboarding process is working. Let new employees at all levels demonstrate what they’ve learned during a training program, and solidify that knowledge by teaching it to their peers. Asking learners to teach others is a good way to observe if a training program is working and how it will affect the way your team gets things done.
Chapter 3
Stumbling Blocks to Avoid
14 Onboarding Mistakes Managers Make

Successful onboarding requires a structured approach, open communication and effort from several parties, including the new employee. Managers know they suffer the most when poor onboarding takes place.

If not done right, it can be costly, resulting in lost time and higher rates of turnover for new employees.

Avoid these common onboarding pitfalls:

1. No written onboarding plan

Not having a formal, written onboarding plan means you’re playing new hiring orientation by ear. Your step-by-step onboarding plan should be in writing to 1) remind everyone who participates of the steps involved, and 2) ensure that all new employees receive the same introduction, training and feedback that you know is effective. How much detail is included in the plan can vary, but having the core process in writing leaves less room for errors and makes the process more effective.

2. Antiquated plan

The design of your onboarding plan should be based on several years of research and experience on what works and what doesn’t. But allowing your plan to age ungracefully will hurt its effectiveness. Revisit your plan at least every three years, with an onboarding committee to suggest changes that keep up with the times.

**Tip:** Try some “role-playing” with your onboarding system periodically to see if the plan still coincides with company needs and expectations.
3. Too much HR

Your program design should make it clear that the onboarding process is technically “owned” by hiring managers like you, not by your human resources or recruiting departments. Those departments play a role, but you as manager should control the pace of the introductions and training the new hire receives. You know best what the new employee needs to learn.

4. Too many delays

You’ve postponed important onboarding components until a large group of new hires can participate in a single session. But too many delays can negatively impact new-hire productivity and derail their progress. Keep any delays in your established program to a minimum and use them only when absolutely necessary.

Tip: Don’t be afraid to move things around if needed. Sticking to continuity, not merely to a rote schedule, is the important thing.

5. Excluding direct managers

A common fault (and the one with perhaps the most negative impact) is not having the employee’s direct department manager present on the first day. With the manager absent, the new hire can feel unimportant, and important details can be overlooked. Always time your onboarding program (and of course the new hire’s first day) to when the direct manager can be fully present and act as the main onboarding leader.
6. Unrealistic/unclear expectations

This goes for both the responsibilities for the new hire’s position and for less formal elements of the job. Studies show that “providing clearer guidelines” was a main thing employees said that companies could do differently when training new hires, and being assigned different work than expected was a key reason why new employees leave quickly. It’s important to establish expectations early and clearly, preferably broken down into manageable time frames (such as first 30 days, 60 days, etc.). New employees should never be left guessing what their job roles are and how to do them.

**Tip:** Have new employees review the written expectations for the job, ask if they’re clear and manageable and answer any questions.

7. Assuming your new hire knows more

This pitfall can occur with new hires who have a good deal of experience or came from a similar job. It’s tempting to let the new hire take the ball and run with it based on how well he or she did in interviews or in former positions. But be aware that even if the job position is similar, there are myriad differences the new employee will need to figure out. To leave him or her to wing it is unfair, and could result in frustration for the employee (and a quick exit).
8. Overload

A top onboarding killer is overwhelming new hires on the first day with tons of information that results in sensory overload. New hires are likely apprehensive already, so putting them under this kind of pressure makes it harder for them to ask questions or even remember most of what you tell them. Break up the amount of information provided into several days, so you can explain things in detail before jumping ahead.

9. Cutting onboarding training too short

Like almost any drawn-out process, onboarding can get tiring. Some managers might be tempted to review the plan for the next month and cross “unnecessary” steps out to expedite the process. You might think this is doing both you and the new hire a favor, but in reality, you'll likely be skipping over valuable steps that can make or break progress.

10. Relying on too much face-time

Even in today's tech age, most onboarding activities are still done in live, real-time meetings. But doing everything face-to-face can limit the new hire’s ability to reference this information later on. This can include general info provided to all new hires, including phone lists, general department and HR forms, common Q&As, buzzword and acronym dictionaries and names of employees and departments.

**Tip:** To save time, provide the most standard onboarding information in an online portal that can be accessed and read by the new hire between work tasks.
11. Giving information that’s too one-directional

Having some of your onboarding program delivered on informational presentations, videos and online might give your new hire all the background information he or she needs. But this unidirectional approach doesn't allow for natural interaction, and can make the new hire feel like little more than a “hard drive” for receiving information. It’s fine to include videos and online presentations as part of onboarding, but only for general history and company background, not for the nitty-gritty details of the job.

12. Using a one-size-fits-all approach

Employees require different management styles, so why assume that everyone would flourish under the same onboarding process? At the beginning of onboarding, inquire about a new hire’s learning style, and adjust your schedule accordingly. Make it clear that feedback is welcomed, and encourage questions.

13. Relying on tech for communication (especially for remote new hires)

In a mobile tech world, we’ve become accustomed to telecommuting and remote offices. But when it comes to onboarding, this setup can be challenging. When communication only happens over email or the phone, simple requests or assignments can be interpreted a million different ways. This can lead to costly mistakes and lower productivity as your new hire gets used to the new environment. If you are onboarding a new, remote employee, use phone calls and video chat where you can hear tone of voice and hold a clearer conversation.
14. Forgetting about onboarding assessment

You completed a new hire's onboarding without a hitch. But you don't want to find out it worked badly two months later – when the new employee you had high hopes for heads for another job. So it's vital to gather feedback throughout, immediately after, and a few months after onboarding. Collect feedback from the new hire on the process so that you can make improvements for future hires. Ask about what worked and what the company could do better. Emphasize that they should be as honest as possible. Every employee learns differently, so it's important to keep a pulse on how the individual is feeling throughout onboarding. In addition, collect feedback from other employees who participate in onboarding. Your fellow managers and coworkers can sometimes see steps that are redundant or outdated that you might miss that you can remove from the process.

**Tip:** Surveys are a good way to get this information. List things you specifically want to know to get a clearer picture rather than just asking people for their random thoughts.
Effective Onboarding Is Critical To A Company’s Growth

Onboarding is a process every manager and company does, but not always in the most effective way. Failing to put necessary time, effort and planning into your onboarding process can cost you.

If new employees feel the integration into their new workplace was done haphazardly, they’ll fail to thrive in the jobs they were hired to do. New hires who receive insufficient training and support to do their new jobs often become frustrated enough to leave.

And high employee turnover is something your company can’t afford.

There are ways to make your onboarding process efficient and worth the time and effort.

A solid onboarding approach works to nurture new hires so that they can adapt to new surroundings, get a feel for the company culture and atmosphere, get to know co-workers and the strategies the company uses to run well, and acclimate themselves to their new position, so that when they begin the nuts and bolts of their job, they’re able to do it with confidence.

Effective onboarding programs contain all or most elements of the Four C’s:

1. Compliance, to make sure new employees understand the rules and regulations of your company

2. Culture, to teach new employees the company’s mission, values and organizational norms
3. Connection, to put new hires at ease in their surroundings with a formal welcome to help them develop rapport with their co-workers and feel like part of a team, and

4. Communication, ample opportunities to discuss early expectations, ask questions and clarify goals.

While it’s important to have your onboarding process in writing, you can and should leave room for adjustments and flexibility.

Create scheduling calendars that you can adjust, depending on the needs of the new hire.

Revisit your onboarding plan every so often so that you can change approaches when needed.

Make sure everyone involved in onboarding in some way is familiar with the plan and knows what their roles are.

And most importantly, create a way to assess how well you are onboarding.

Don’t wait until you see a growing amount of turnover in your department or company; you’ll already be incurring the costs of an ineffective plan.

Gather feedback from both new employees and from co-workers who participate in the onboarding process, and rework your plan to reinforce what works and eliminate what doesn’t.

Investing in the onboarding process is something that all managers should do, but often leave to the Human Resources department or to a new employee’s co-workers.

Onboarding is more than simply signing legal papers and receiving training.

It is a vital step that introduces employees to new surroundings, new co-workers, new company goals and traditions and new work tasks. When it’s done well, it can foster happy and productive employees so you and your company can reap the benefits of retaining successful, talented workers.
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• What, if any, new information or advice did you find from reading this Blueprint?
• What section or specific information was most useful? Why?
• How did you or will you implement the ideas in this Blueprint?
• What three benefits have you gained?
• Would you recommend this Blueprint to others?
• What information was unclear or missing that we can clarify or add?
• Is there anything else you’d like to add?

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Employee Engagement
Performance Management
Leadership
New Managers

Difficult Situations
Business Skills
Hiring
Employment Law
New Employee
6-Month Evaluation Survey
New Employee
6-Month Evaluation Survey

Six months ago, you began employment at

Since then, you’ve been able to learn about our company’s culture, mission, vision, values, policies, procedures and benefits during new employee orientation and other employee development training.

Because we value our employees’ feedback, we would like to know how you feel on your progress, and how you feel your onboarding experience has helped you succeed in your position so far. Please fill out the following questionnaire as instructed and return it to your manager or to our HR office.

Please indicate Yes (Y), No (N), or Unsure (U) for each statement below.

1. Overall, how do you feel about your new job and working for our company?
   - Y  N  U  I feel inspired and eager most days.
   - Y  N  U  I feel welcomed.
   - Y  N  U  I work in a friendly and supportive environment.
   - Y  N  U  I feel engaged and productive.
   - Y  N  U  I feel I have a long future at this company.
2. What do you now know about your job?

- Y N U I know what is expected of me by my supervisor(s).
- Y N U I know what is expected of me by my co-workers.
- Y N U I know what my performance expectations are.
- Y N U I know how to do most or all of the tasks assigned to me.
- Y N U I understand how to obtain the information and resources required to do my job.
- Y N U I regularly get sufficient guidance and training on how to do my job.
- Y N U I understand my job responsibilities.
- Y N U I understand the purpose of my job.

3. What do you now know about the company?

- Y N U I received information on and understand the company's culture, mission, vision and values.
- Y N U I received information about company history and understand how it started.
- Y N U I understand how my job fits into the overall mission of the company.
- Y N U I understand the basic network of company departments and how they work together.
- Y N U I have the essential supplies, equipment and support to do my job or know where to find them.
- Y N U I received information on company policy and procedures in a timely and comprehensive manner.
Practical Tools: New Employee 6-Month Evaluation Survey

- Y  N  U I understand the company's policies on attendance and general workplace behavior.

- Y  N  U I understand the company's policies on workplace harassment, illegal drugs, alcohol abuse and secondary employment.

- Y  N  U I understand the company's policies and procedures concerning performance and personal misconduct and the grievance policy.

- Y  N  U I regularly use my (handbook or Intranet) as a reference guide to understanding the company's policies and procedures.

**Answer the questions below in the space provided. Please include your name on the evaluation.**

4. What were the most helpful activities or information covered during your first six months?

5. What activities (or information) do you feel were not helpful or not needed?

6. What suggestions do you have for improvement?
7. What other comments do you have about your onboarding experience?

________________________________________________________________________

8. What overall rating would you give your onboarding experience (please circle one).

   Poor(1)   Fair (2)   Good (3)   Very Good (4)   Excellent (5)

   Explain:

________________________________________________________________________

________________________________________________________________________

Name: ________________________________________________________________

Department (Optional): _________________________________________________

Month Hired: __________________________________________________________
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15 Practical Training Tools
To Help New Employees Succeed
15 Practical Training Tools To Help New Employees Succeed

All managers know training new employees is a crucial part of the onboarding process. Whether you’re training just one new hire or a bunch at a time, these 15 training techniques will never fail you.

1. Relate The Subject Matter To A Common Theme

Apply some of the material you’re teaching to concepts your trainees can relate to.

If you’re training people in communication strategies, for example, use the idea of targeted advertising, or the concept of messages that can have double meanings.

It helps to have something relatable to everyday life to illustrate your points, and it helps those you’re training retain your message.

2. Repeat Important Names And Concepts

You don’t want to sound too repetitive, but remember at certain intervals to reinforce the idea or concept you’re training people on.

If you break down your training into chapters, for example, make sure to repeat the chapter concept throughout the training. It’ll help trainees connect the new information with a common thread.
3. Use A “What’s In It For Them” Approach

People who are learning something need to know why they’re learning it. If you’re teaching a trainee how to archive material, for example, stress that the process is critical not only for the rest of the department, but for the trainee’s work as well; they will likely have more trouble doing their jobs if they don’t understand the process.

4. Put Some Information In A Q&A Format

For some information you present, try framing a question-and-answer section. Or use the idea of common questions people ask about the specific topic you’re teaching. This technique is especially effective at the beginning of a training session; it reinforces the idea that there aren’t any stupid questions.

5. Create A Relaxed Environment

You want to encourage interaction and also make sure everyone has equal access to any visual aids you’re using. If possible, swap uncomfortable, stiff chairs for ones with more support. Push desks into a circle, or hold some training sessions in a different setting. But don’t get everyone so comfortable that they lose concentration.

6. Get To Know Your Audience

Ask for a show of hands to see if anyone is already familiar with the topic you’re teaching, or for a general age or education range if it’s appropriate to your subject matter. You don’t want to be addressing people who you think are experienced in the topic, only to learn that most of your group are novices – and vice versa. You then would need to tailor your training to fit the audience.
7. Explain, Don’t Eliminate, Jargon

Not all jargon is bad; in many instances it’s the only way to train people on specific subjects, such as finance and law. Just make sure your information doesn’t rely too heavily on it, especially if your audience is less familiar with the terms used. Avoid jargon when and if you can, but if not, take time to explain it in layman’s terms.

8. Try Not To Do All Of The Talking

First, you’ll go hoarse. Secondly, and more importantly, you’ll lose your training audience. Break things up a bit with either short videos or letting one of your trainees read part of a chapter you’re going to discuss. Or if possible, involve other managers or co-workers as “guest speakers” if they’re seasoned in the information you’re teaching. This is especially important if your training lasts for more than a few hours or days.

9. Get Trainees To Do A Little Classwork

In the same vein, before launching into your training spiel first-thing, have your trainees start the session. Tailor a quick brainstorm about that day’s topics, or ask them to explain a concept you’re focusing on in their own words. The more you engage trainees, the more likely they’ll retain the concepts you’re teaching.

10. Recap When Needed

Like the old TV serials, which began each episode with a short snippet of the last one, this technique puts the past sessions the training covered in perspective and adds continuity to what is being learned. Recaps are appreciated by trainees, especially if you’re covering a lot of training ground in a short period of time.
11. Use Pop Quizzes

Most training manuals have short recap quizzes at the end of each chapter. You might be tempted to gloss over them to save time, but having your trainees do a short quiz on material you just taught is a proven way to reinforce what is learned. It’s worth the extra 15 to 20 minutes it might take.

12. Take Breaks

This tip is hard when you’re rolling along and making progress, but people who are giving you their undivided attention need to relax a bit. Pick a place to wrap up your chapter or lesson point and break for 10 minutes, allowing trainees to stretch or use the facilities. As an even better tip, assign one of the trainees the task of letting you know when a certain amount of time goes by so you can remember to break.

13. Stick To The Time Limits

If you told your trainees the session would last two hours, watch the clock and don’t go over the time. Many trainers fall into a habit of getting “just one more point in” to wrap up a lesson, especially if they have only one or two points left to make on a specific subject. But going over the set time frame for training usually backfires for several reasons. One is that even if you have just a little bit more information to teach, you’re likely losing your trainees’ attention regardless. It’s more difficult to grasp and retain information that’s squeezed in as an afterthought. Secondly, dragging out the session over the allotted time could make your trainees annoyed, especially if it cuts into their other responsibilities.
14. Get Trainees To Assess Their Progress

The best method for doing this is an end-of-training survey. But you don’t have to wait until the training is over. Midway through is also an optimal way to see how trainees are picking up the information you’re teaching – and a good way to assess how you’re doing as a trainer.

15. Most Important – Keep Things Lively

You’re not going to have positive results as a trainer if you don’t make learning fun. This can be hard to do if you’re a “serial trainer,” having taught the same material repeatedly to new groups. Make sure you develop ways to keep your material from going stale. Try new approaches and activities to shake up things (both for the trainees and you!) Enthusiasm for the information you’re sharing will be contagious – and trainees will enthusiastically show up to learn.
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New Employee Checklist

- Fill out payroll forms, fill out and sign I-9, W-4 IRS form, etc.
- Inform new employee of payroll frequency (bi-weekly or semi-monthly, any hold-back, etc.)
- Ensure new employee brings voided blank check for direct deposit
- Have new employee make any necessary election for benefits programs, choose a beneficiary for 401(k) if any, etc.
- Provide copies of all applicable company policies (especially sexual harassment) and obtain signatures
- Provide building access codes, keys or cards, and brief on security
- Show new employee assigned workspace, ensure all basic tools are there (chair, desk, computer, telephone, notepad, pens, etc.)
- Get new employee log-in info from IT department; make sure computers, printers, etc., work
- Assign official greeter to stick to employee on first day, introduce him/her to co-workers
- Choose mentor to guide new employee through first few weeks and months, especially on issues of company culture
- Introduce new employee to immediate supervisor, who should be told to keep close eye on new employee at first
- Introduce new employee to other workers who may live close by to share best routes to work and make commute easier (very important!)
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www.hrmorning.com
You’ve successfully ended the interviewing and hiring process with a new employee who is ready to start work. What happens from that employee’s first day onward, however, is somewhat up to you and your onboarding process. It’s important that you do a thorough job to ease your new hire into both the company and the new position.

How well you introduce the new employee to both the new job and your company will play a large part in his or her future success. It’s important to draft an itinerary or planner for your new employee’s first days on the job, as well as for follow-ups at 30, 60, 90 and 180 days. Use this step-by-step checklist guide to create such an itinerary and to get your new employee on track.

**Before the hire’s first day on the job**

**Set up hire’s work station:**

- Make sure all necessary equipment works
- Gather basic office supplies for the new hire’s desk
- Make sure work area is clean

**Prepare a new-hire binder. Include:**

- General company information
- Map of building/department locations
- Company phone list
- Instructions to set up voicemail boxes, email settings, necessary passwords and log-in information
- Sign-in/sign-out processes
• Vacation/sick time rules
• List of internal identifiers or definitions

Prepare paperwork for new hire to sign. Include:
• Payroll information
• Insurance information
• Employee contact information
• Employment law disclosures

Day 1: Sample schedule

• 8-9 a.m. Greet employee upon arrival. Escort to office or conference room for initial introductions. Provide employee with initial paperwork to sign and look over.
• 9-10 a.m. Show employee to workstation, office or cubicle. Introduce or have someone introduce employee to immediate coworkers. Have someone (either you or an IT person) show employee how to operate computer and navigate the programs used.
• 10-11 a.m. Present the new hire with a detailed schedule or itinerary for the first day or first week (or both) and let them review what the initial week will involve.
• 11 a.m.-12 noon Give the new employee a tour of the office and the company building(s), including exits, bathrooms, kitchen locations, the office supplies closet, mailroom and libraries.
• 1 p.m.-2 p.m. Take the new employee out for a welcoming lunch, either outside the office or in the company kitchen.
• 2-3 p.m. Assign the new employee a “contact person,” someone who the new employee can ask for help on general issues if their supervisor isn't available.
Week 1: Sample Schedule

The employee’s first week should follow as closely as possible the itinerary presented to the new hire. Following a set schedule for the first week gives new hires specific things to focus on learning and understanding. Week 1 should include:

Day 1
- Greet employee; meet with HR to fill out legal, policy and insurance forms;
- Set employee up at new work station;
- Enlist IT to help employee create passwords and orient to computer systems;
- Take employee for lunch with co-workers;
- Do a round of the office to introduce employee;
- Supply employee with paperwork and reading materials needed for job.

Day 2
- Provide employee with resources and ways to research job tasks;
- Introduce employee to secondary managers they’ll be working with;
  - Assign a “work buddy” to help answer questions and provide company info;
  - Give employee easily completed small tasks that are part of job description.

Day 3
- Assign a mentor to the employee to meet with and go over job-specific details;
- Give employee one or two “longer term” assignments that take a few days or weeks to complete;
• Familiarize with whom does what in other departments that will affect the employee's job;
• Lunch with new employee, manager and mentor;
• Conference call with off-site managers.

Day 4
• Allow employee to work on assignment research/time alone;
• Have employee sit in on first department meeting;
• Have mentor review department data tracking and archiving systems;
• Allow employee to shadow a team member giving a presentation.

Day 5
• Have employee turn in first small assignment;
• Invite employee to company’s community outreach planning meeting;
• Have employee shadow assigned coworker on a variety of new tasks.

The First 30 Days

The employee should have a grasp on the types of assignments and tasks he’ll be doing for the job, and have started on a few of them with some guidance. By the end of 30 days, new hires should have a good idea of their responsibilities, what to expect in their role and what’s expected of them.

Goals for the first 30 days should include:
• Learn and get comfortable with the company’s content management systems and Intranet;
• Learn more about the company’s products/services;
Practical Tools: Guide To A New Hire’s First 180 Days

• Start the employee on a small, longer-term project or assignments;
• Set some deadlines to work toward.

The First 60 Days

The first two months should involve more collaboration and handing over bigger responsibilities. The employee should be receiving less training while taking on more tasks for his job. If everything seems like it's going well, introduce bigger projects and longer-term responsibilities. Have the new employee begin to collaborate with other teams on necessary tasks.

Goals for the first 60 days could include:
• Complete a short-term assignment on a deadline and be able to start another;
• Take on a more in-depth project or one or two more important tasks;
• Begin working regularly with other teams as necessary and be included on a team project;
• Have a comprehensive understanding of the routine processes.

The First 90 Days

As your employee is taking on more responsibilities and accomplishing bigger tasks, he’s going to start becoming more accountable for his own work. Your new hire should now be able to tackle projects with limited guidance from you, and can be trusted with bigger responsibilities.

Goals at the completion of the first three months could include:
• Completing a project independently with little assistance;
• Controlling some aspect of the job position (e.g., being placed in charge of a specific duty);
• Contribute more ideas to meetings and adapt or start a project independent of supervision.

The First 180 Days

By now, the employee should be well-integrated into the company, but not completely. That can take up to a year or more. But they are finally reaching the stage that they are no longer “the new employee.” They should be expected to continue to grow.

Goals and actions going forward can include:

• An interim six-month performance evaluation listing achievements and next steps to be reached at one-year mark.

• Have the employee complete a 6-month evaluation survey (There’s one in this Blueprint)

• Introduce the employee to concept of “job enlargement.” Everyone in the department takes on some additional task, an administrative task for the department, a cross-training assignment, or other additional duty.
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