



ONBOARDING FOR EMPLOYEE ENGAGEMENT TOOLKIT

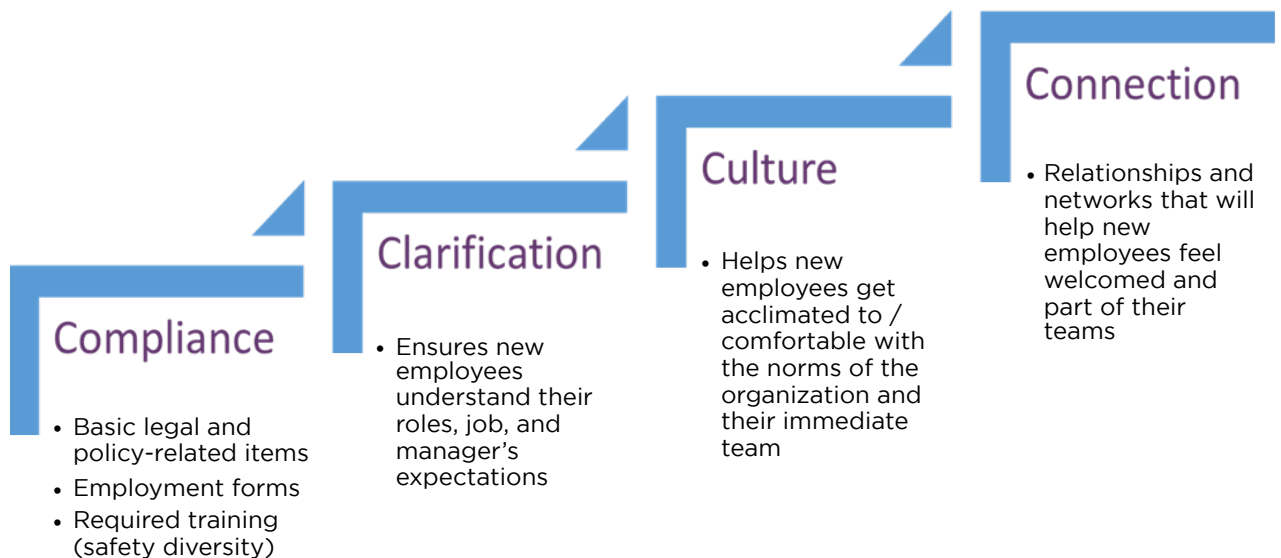
## INTRODUCTION

Employee engagement doesn't have to be mysterious or elusive. Onboarding for employee engagement is designed to help you intentionally focus on the employee experience from the time of hire through the first year of employment.

A directed onboarding experience should:

- Aid employees in connecting the organization's history, vision, and purpose
- Effectively connect employees with new colleagues and team members
- Accelerate the learning curve which improves commitment and productivity

An onboarding process should include four building blocks:



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## WHAT DRIVES ENGAGEMENT FOR NEW EMPLOYEES?

Employees enter your doors full of society anxiety. They want to perform well but fear they will not be able to do so through no fault of their own. The best thing you can do is alleviate their initial fears by answering the questions that are on their minds.

1. What's the culture? What are the core values?
2. What's expected of me?
3. Who do I need to know?
4. What resources do I need, and when will I need them?
5. What terms do I need to understand to be effective, and when do I need to know them?
6. What systems do I need to know how to use, and when do I need to know how to use them?

Information overload is a common mistake made in the onboarding process. This often occurs because onboarding is viewed as an event instead of a process. Orientation, as critical as it is, starts the process of becoming familiar with an organization. However, it's insufficient. Onboarding looks at the life cycle of an employee's experience for the first year with the intent of providing employees the learning they need when they need it. It's intentionally sequenced to grow them at a proper pace.

## MAKING CONNECTION EASY

Make the responsibility for connections shared with both the employee and the manager. Do not leave it solely to the new employee. The manager should be expected to:

- Schedule and facilitate meetings with key people over a period of time
- Introduce individual into work teams/groups, and the organization
- Invite individual to key events, make introductions, and facilitate conversation

## TOOL #1 - MAKING LEARNING FUN

Add some fun to your new team member's onboarding experience by creating enjoyable activities and games that help them learn about your organization's policies, culture, and mission.

### ALL ABOUT US

1. Our organization has \_\_\_ locations in \_\_\_ states and \_\_\_ countries.
2. We employ approximately \_\_\_\_\_ employees worldwide.
3. We have been in business \_\_\_\_\_ years.
4. Our corporate colors are \_\_\_\_\_.
5. The CEO of our organization is \_\_\_\_\_.
6. Our company website is \_\_\_\_\_.
7. The name of our company's newsletter is \_\_\_\_\_.
8. Our best-known (or bestselling) product (or service) is \_\_\_\_\_.
9. Our parent company is \_\_\_\_\_.
10. Our biggest competitor is \_\_\_\_\_.

### LIVE FROM HEADQUARTERS!

1. What is our organization's primary philosophy?
2. How did our organization get started?
3. What is of greatest importance to our organization?
4. What is our organization's mission?
5. What is our vision?
6. What are we most proud of?
7. What are our best-known products?

### NEWBIE FEUD TERMINOLOGY

TERM OR ABBREVIATION	WHAT DOES IT MEAN?

## Getting to Know You Questionnaire

Use this tool to get to know your new team member and learn more about them on the personal side. Additionally, it is a great resource for recognition and reward purposes. Ideally, it should be shared with the new team member for completion **prior to the first day.**

YOUR NAME:
<b>What is your favorite:</b>
Color:
Candy:
Restaurant:
Store:
Season:
Music:
Movie..
Workplace Drink (coffee, tea):
Other:

TELL ME MORE!
What are your dietary restrictions, if any?
Something you want me to know about you:
Something that really annoys you:
What are you passionate about:
What's the most helpful way for you to receive feedback?
How do you act when you are stressed out?
How do you recharge:
What do you do for fun?
What motivates you?
When is your birthday (month and day only)?
Preferred recognition (e.g. public or private words, time, \$\$/gifts)?

## TOOL #2 - ORIENTATION PLAN

You made the investment to recruit and hire; now intentionally invest in their success by having an orientation plan that covers the four building blocks over the first year. Communicate the plan to the new hire so they know what to expect and can hold their supervisor accountable for it. What your orientation plan should contain:

	PREPARE	WELCOME/ORIENT	
	PRE FIRST DAY	FIRST DAY	30 DAY
Compliance	First day activities checklist	Complete required forms	Follow-up survey
Clarification	Daily/weekly communication checklist	Onboarding into work assignments /learning plan	Onboarding into departmental and organizational policies and procedures
Culture	Welcome call to new hire Prepare work area	Personal greetings Orientation to culture and values	Orientation to department and organization strategy, goals, objectives, metrics
Connection	Memo to staff with new hire info Mentor/coach assignment	Team lunch	Kickoff one-on-one coaching

CONNECT/INTEGRATE		
90 DAY	180 DAY	1 YEAR
First day activities checklist	Complete required forms	Follow-up survey
Daily/weekly communication checklist	Onboarding into work assignments /learning plan	Onboarding into departmental and organizational policies and procedures
Welcome call to new hire Prepare work area	Personal greetings Orientation to culture and values	Orientation to department and organization strategy, goals, objectives, metrics
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## ORIENTATION PLAN TIMELINE

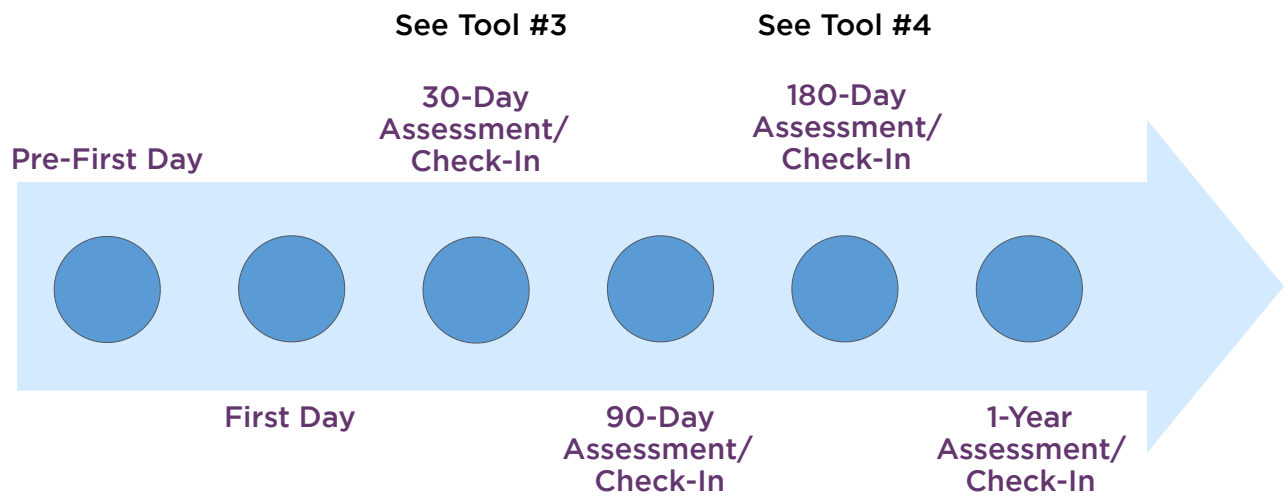
### PRE-FIRST DAY CHECKLIST

- ✓ Call new employee and welcome him or her to the team
- ✓ Send memo to staff informing them of the new employee's arrival
- ✓ Prepare the new employee's work area
- ✓ Create a checklist of activities during the new employee's first day
- ✓ Create a checklist of information to communicate daily/weekly during the new employee's first month
- ✓ Create a checklist of suggested activities and work-related assignments for the employee to complete during the first three months
- ✓ Assign a staff member to serve as a mentor and coach to the new employee
- ✓ Schedule time to spend with the new employee the first day, weekly throughout the first month, and 1-2x per month for the first year

### FIRST DAY CHECKLIST

- ✓ Personally greet new employee and introduce new employee to team, mentor and/or coach
- ✓ Conduct tour of building and work sites
- ✓ Provide overview of department and its relationship to the rest of the organization
- ✓ Review job description, responsibilities, and schedule
- ✓ Have employee complete required forms
- ✓ Orient employee to his/her desk/work station
- ✓ Take employee to lunch
- ✓ Begin ongoing onboarding process (activities and work assignments, organizational orientation, learning plan, etc.)
- ✓ Meet with employee at end of day
- ✓ Create a checklist of suggested activities and work-related assignments for the employee to complete during the first three months
- ✓ Assign a staff member to serve as a mentor and coach to the new employee
- ✓ Schedule time to spend with the new employee the first day, weekly throughout the first month, and 1-2x per month for the first year





### 90-DAY CHECK-IN

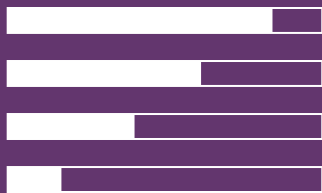
- ✓ Review department goals and priorities
- ✓ Discuss department policies and procedures
- ✓ Discuss performance standards and expectations
- ✓ Explain the performance evaluation process
- ✓ Explain career development options
- ✓ Assess effectiveness of structured on-the-job activities
- ✓ Review and update learning plan. Assign a staff member to serve as a mentor and coach to the new employee
- ✓ Schedule time to spend with the new employee the first day, weekly throughout the first month, and 1-2x per month for the first year

### TOOL #3: 30-DAY ASSESSMENT TOOL

Creating learning plans and development goals too soon in the onboarding process is a common mistake. An assessment tool applied monthly during the first 90 days enables crafting of customized learning plans and development goals.

**Instructions:** Please complete this self-assessment. This tool is strictly for your benefit. Please rate your level of understanding and comfort with the topics noted below. Also note the opportunities you have had to develop your knowledge within those topic areas over the past 30 days through on-the-job activities and assignments, self-study, and training events.

RATING (H, M, L)	TOPIC	None	Limited	Some	Extensive
	Organization history/culture				
	Organization mission, vision, values				
	Organization structure				
	Organizational policies, procedures, and processes				
	Departmental policies, procedures, and processes				
	Application of technology to defined roles and responsibilities (systems, apps)				
	Industry knowledge and competitive landscape				
	Products and services (what's offered, why, how, to whom, and at what price)				
	Financial results and key financial drivers				
	Organizational and departmental strategy, goals, objectives, and metrics				



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