

Build an Exceptional Team that Gets Results

Session 3

Onboarding & Reboarding

LUANN UNIVERSITY

Today's Goal

Learn actionable information to set up your new hire
or reset with an existing hire to *thrive*
and build your business to extraordinary levels of success



Onboarding best practices

Did you know?

- ✓ Organizations with structured onboarding saw a 60% year-over-year improvement in revenue, and a 63% improvement in year-over-year customer satisfaction
- ✓ Organizations with a strong onboarding process improve new hire retention by 82% and productivity by over 70%
- ✓ Employee turnover can be as much as 50% in the first 18 months of employment (and cost a company six to nine months of salary – or more - to identify and onboard a replacement)



Establish emotional bond.



Inspire and connect your new employee to your culture, values, mission and vision. Foster relationships 1:1 and with the team.

Build knowledge.



Share information about your company, the job, expectations, policies and practices, and systems, tools and resources.

Show them how.



Show them what they need to know and how to do it to succeed in their job – processes, systems, etc.



VISION, VALUES, CULTURE

Share the Company's vision, values, and culture. Discuss how the company vision and values apply to the new team member in their specific role in the company. Discuss what the company is known for? What does excellence look like in the firm? Provide real-life positive examples of what living the values and excellence looks like in the company. Include a diverse group of employees to meet the new team member and share on different topics so the new team member is exposed to the breadth of the organization.

Sample
COMPANY CULTURE



INSIGHTS
RESPONSIVE
EXCEPTIONAL
TEAM
PROBLEM SOLVERS
AWESOME JOB
CLEAR COMMUNICATION
EFFICIENT
CREATIVE
CUSTOMER SERVICE
STRONG TEAM
FLEXIBLE
GREAT JOB
GREAT RESOURCE
OUR CULTURE
HELP
ACCURATE
SUPERB
AMAZING WORK
PERFECTION
EAGERNESS
HELPFUL
CONSISTENT
ABOVE & BEYOND
EXCELLENT
LIGHTNING FAST
SUPPORTED
DEDICATED
GREAT TEAM
EFFECTIVE
SOLUTIONS

Sample
COMPANY VALUES



P.R.I.D.E.

PASSION

We have a passion for our business, our standards, ourselves, our clients, our work product.

RESPECT

We treat each other and customers with kindness, professionalism, and respect.

INTEGRITY

We are honest and operate with strong moral values and always do what is best for our customers; we are accountable for our work.

DEPENDABILITY

You can depend and rely on us to do what we say we are going to do; we operate from teamwork and our teammates can count on us.

EXCELLENCE

We deliver excellence in customer service and products.

WELCOME IN A WAY TEAM MEMBER KNOWS THEY MATTER

Authentically demonstrate with your planning ahead and onboarding actions that new team member is important to the team and that you care about them and their success. As the principal or hiring manager spend the entire first day with the new team member (highly honoring). Take the new team member to lunch or go with the entire team.

- ◆ Current role and how they will be working with new team member.
- ◆ Professional background (experience at other firms, etc.).
- ◆ What they love about their job.
- ◆ What they love about working at this company.
- ◆ What they like to do for fun in their free time.
- ◆ What brings them joy in life.

Did you know?

- 50% of employers try to retain their employees with a counter-offer.
- 58% of job seekers say they would consider another job if they do not hear from someone at the hiring company between the time of offer acceptance and the first day of the job.
- 69% of job seekers say the first day on the job experience will impact their decision to stay with the company for more than one month.
- 76% of job seekers who accept a position expect they will have lunch with team members on their first day.



Onboarding Checklist

New Hire Name	Position	Welcome Date

Use this checklist to prepare, track and ensure completion of important action items to successfully welcome and onboard a new employee.

PRE-START

Upon acceptance of the job offer and confirmation of the start date, complete these steps:

- 1. Introduce and welcome new hire to the company**
 - a. Email new hire to welcome and confirm start date and convey excitement; include confirmation of start time and location (if on-site) and any helpful instructions (i.e., parking)
 - b. Ask new hire for a brief bio with fun facts and picture for the purposes of a company introduction
 - c. Using the bio and picture, craft an email to introduce new hire to the company (cc: the new hire to invite others to welcome them)
- 2. Communicate to teams**
 - a. Share with relevant people that the position has been filled
 - b. Communicate name and start date
- 3. Create orientation and onboarding plan**
 - a. Establish the plan for the first day, week and 30, 60, 90-day objectives (template)
 - b. Collaborate on development of plan with key resources
 - c. Communicate and coordinate schedules with key contributors, participants
 - d. Schedule employee for the next available company onboarding session
 - e. Schedule employee with HR to review handbook, company policies
- 4. Equipment and technology set-up**
 - a. Order and set up computer, devices and other workstation needs
 - b. Create user accounts, enable access to required systems, software, applications
 - c. If remote position, send equipment and IT set up instructions before first day
 - d. Designate a resource to support new hire in getting equipment up and running
- 5. New Hire Paperwork**
 - a. Send new hire information and required paperwork to complete and how to provide or complete (i.e., I-9 form)
 - b. Send new hire benefits-related paperwork to review in advance, if possible

6. Prepare Workstation

- a. If new hire will start at the company's location, prepare workstation so that it is nicely organized, welcoming and clear of clutter
- b. A special touch is a plant, flowers or gift that represents your company

DAY ONE

1. Hiring manager - Be ready to meet and greet new hire upon arrival (being on time signals care and that the person matters to you). This might be in-person or a video call if remote.
2. Follow the onboarding plan for day one

30 DAY

1. Use dedicated 1:1 meeting time to review status and progress of onboarding and milestones associated with the 30-day mark
2. Follow the onboarding plan, use as ongoing reference through the first 90 days
3. Finalize goals for the remainder of the year, goals which new hire will be accountable for achieving as part of the job scope

60 DAY

1. Use dedicated 1:1 meeting time to review status and progress of onboarding and milestones associated with the 60-day mark
2. Follow the onboarding plan, use as ongoing reference through the first 90 days

90 DAY

1. 90-Day Onboarding Review
 - a. Two to three weeks before the 90-day milestone arrives, send the new hire an email inviting them to complete the 90-Day Onboarding Review
 - b. Simultaneously include a proposed meeting date and time to discuss
2. Use dedicated 1:1 meeting time to review status and progress of onboarding and milestones associated with the 90-day mark
3. Celebrate accomplishments and achievement of milestones

POST 90 DAY

1. Continue to devote a 1:1 meeting to discuss goals and performance, learning and development needs and provide direction or support, as needed (quarterly, minimum)
2. When you see it, say it. Continue to share positive or constructive performance feedback in a timely manner and with honesty and kindness.

Onboarding Plan

New Hire Name	Position	Welcome Date
Christina Jenkins	Executive Assistant	May 24, 2023

Welcome! We are excited to have you join our team. This onboarding plan for the next 90 days has been thoughtfully developed to help you feel connected to our company and people and to get you up to speed as comfortably and as quickly as possible.

YOUR FIRST DAY – May 24, 2023

8:30 am with Jeff McMahon

Welcome

- Introductions around the office
- Office tour
- Workstation location, set up – get settled
- IT and account information (login / systems info)

9:30 am with Jeff McMahon

Setting the Stage

- Overview of onboarding plan and schedule for next 30 days
- Overview of company and values (and meaning to your role)
- Overview of company landscape (organizational chart, roles)
- Overview of company goals and priorities
- Important milestone goals and deliverables for first 30-90 days (refer to objectives)

11 am with Jeff McMahon

Overview of the Job

- Your job description
- Important milestone goals and deliverables for first 30-90 days (refer to objectives)

12 pm with Jeff McMahon

Team Introductions

- Team introductions (names, position, scope of work)
- Lunch with Manager and team

OBJECTIVES

What we want you to learn, know and/or do over the next 90 days. Key milestones and goals.

30 Days:

1. Build relationships with members of the team
2. Gain understanding of company culture and values
3. Gain understanding and clarity of role and responsibilities

60 Days:

1. Transition and assume all responsibilities
2. Establish performance goals for remainder of year

90 Days:

1. Perform key responsibilities confidently and competently
2. Complete 90-day onboarding review and discuss with Manager

Schedule of Learning, Training and/or Meeting Commitments for First 30 Days**Tuesday, May 24**

1-4 pm	Training	Lisa Garrett
	<ul style="list-style-type: none"> • Design Manager system • Fabric library organization system 	

Wednesday, May 25

8-11 am	Training	Lisa Garrett
	<ul style="list-style-type: none"> • Client communication 	

Important Scheduling Items

Key dates to know:

1. Biweekly team meeting
2. Weekly 1-1 meeting

Resources and Support

The following individuals are available to support you.

Function	Name	Position	Contact Info
Payroll/Benefits	Sally Jefferies	Payroll Administrator	619.200.2000
IT/IS	Gordon O'Connor	IT Support	619.200.2002
Office Supplies	Ashley Frank	Office Manager	619.200.2003



DEEP DIVE INTO THE JOB

Review a detailed job description with your new team member and discuss each specific functional responsibility area and the expected outcomes. Discuss the team member's skills and experience related to these functions; ask team member which of these functions comes naturally and is one of their superpowers. Align on areas of strength and agreed upon areas where they will need additional training, support, or resources. Provide a big picture view of how this job fits into the business as a whole and how it positively impacts the business process, the team, customers, etc. Discuss why this role/job is important and how it adds value to the whole. Share the key performance indicators of the job and paint a picture of what an exceptional job looks like.





EXPECTATIONS

It is important to let your new team know the company norms and what you expect from them so they can meet and exceed your expectations and goals. Having defined norms and goals will increase your employee's comfort level and their ability to succeed. Communicate team norms. See sample team norms on next page. Set and communicate clear goals or outcomes for the first 1-3 months. These should include activities, training, task competence, specific action items, measurable goals, etc. Where do you see this person at the end of 30 days? 60 days? 90 Days?



Sample Team Norms

Customer Service

Be timely, accurate and responsive to fulfill requests from each other and our customers.

Model Company Values

Set a positive example for other employees; encourage others to do the same.

Teamwork

Show each other that we are important; encourage and support each other as one team.

Communication

Keep each other informed on matters that impact us.

Honesty and Respect

Raise issues directly with the person; do not gossip.

Learn from Each Other

Admit our mistakes and back each other up.

Reliability

Meet deadlines, be on time to all meetings.

Initiative

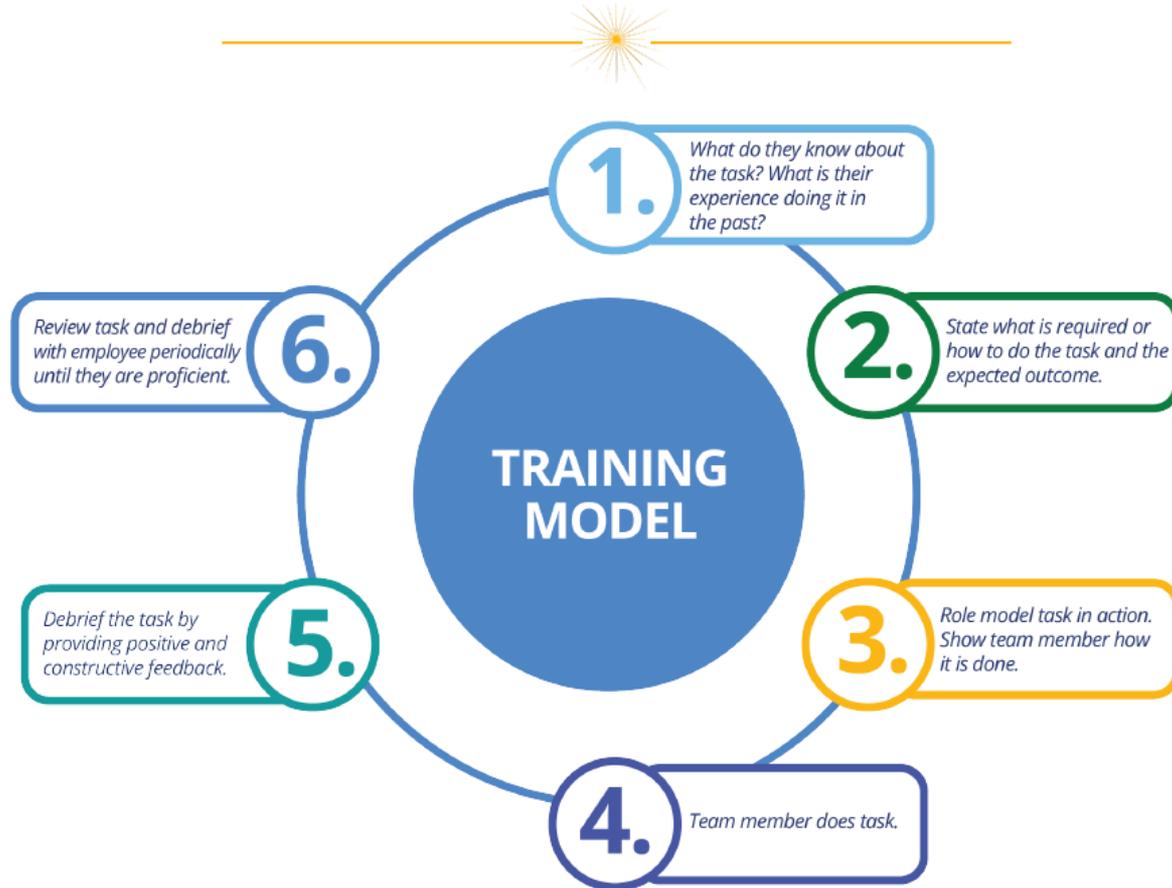
Take initiative, be proactive in supporting each other, performing our work and providing service to others.

Strive to Make Changes Together

If changes affect the team, work together whenever possible.

Fun

Take time to know each other, celebrate, play and enjoy time together.



1:1 Meeting Outline

1. Build Rapport, Trust and Openness

Ask employee questions to establish rapport and check-in on a personal level. Examples:

- How are you?
- What went well over this past week?
- What challenges came up for you this past week?
- Was there anything that surprised you?

2. Review Goals, Progress

Reference the onboarding plan and check-in on progress. Ask employee to share with you about their progress and status. Take the time to update goals or make adjustments to the plan, if needed. Celebrate accomplishments and milestones.

- What goals and objectives are on track for you? Where are you feeling most confident?
- What might not be on track and why?
- Where can I provide more direction?
- Where can I provide more support?
- What do you need to help you succeed?

3. Inquire about Employee Experience

- How is your overall experience working with (company) so far?
- Do you have any feedback or insights about what it's like working here?

4. Close and Next Steps

Review what you covered in the meeting and align on action items. Thank employee for their time and end on a positive note.



Sample

90 DAY REVIEW BY MANAGER



INSTRUCTIONS

90-day performance meeting is a milestone discussion of an employee's progress towards proficiency in the key responsibility areas of his/her position. This is an opportunity for both employee and supervisor to discuss and clarify performance expectations and standards, guide further training and development planning, and establish performance goals for the remainder of the year. Please review the job description and provide examples as appropriate below.

REVIEW

Employee: _____ Supervisor: _____

Job Title: _____ Date of Review: _____

1. **What does exceptional work look like in this position?** Provide specific examples.

2. **Performance On Track** – Key responsibilities and/or tasks the employee is performing particularly well or is progressing in the right direction.

3. **Opportunities** – Key responsibilities or tasks the employee can further develop and improve. Bring up to a higher level of proficiencies.

4. **Culture and Values** – How is the employee living the values and aligned with the company culture? Provide an example. Is there any misalignment with the company culture and values? Provide suggestion as appropriate.

5. **Training and Development** – What additional communication, support or training will be provided.

6. **Goals and Expectations for the next 90 days** – Specific goals (with dates) for the next 90 days to one year.

7. **Supervisor Commitment** – The next steps the manager will do to follow up and support the employee's development.

8 Simple Ways to Show You **CARE**

1

Make time to answer a question

2

Truly seek to understand your employee's point of view

3

Spontaneously check in with an employee to see how they are doing

4

Listen and consider the ideas and suggestions of your employee

5

Honor your commitments to your employee

6

Notice when your employee is not being themselves and ask why

7

Take five minutes to chat

8

APPLICATION

What will you do specifically to improve or enhance your onboarding process?

What will you do with existing employees to enhance their engagement, productivity and effectiveness?

RESOURCES AVAILABLE TO YOU

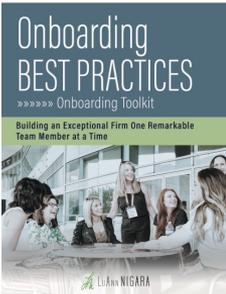
Onboarding Checklist

New Hire Name	Position	Reporting Line

Use this checklist to ensure that all critical components of employee onboarding are identified, assigned and followed at a new hire.

PRE-START
Upon acceptance of the job offer and confirmation of the start date, complete these steps:

1. Review and welcome new hire to the company
 - a. Send new hire an approval and welcome letter that includes company information, start date, time and location of onboarding activities and contact information for support.
 - b. Set up new hire's email, login and password for the company's intranet.
 - c. Send new hire a welcome letter and provide for the provision of a company introduction.
 - d. Send HR file and packet, such as request to reassign new hire to the company and the new hire's onboarding checklist.
2. Communicate to teams
 - a. Send HR file and packet to the team that the new hire has been hired.
 - b. Communicate name and start date.
3. Meet supervisor and onboarding plan
 - a. Prepare the plan for the first day, week and 90, 180, 360-day onboarding timeline.
 - b. Collaborative development of plan with the new hire.
 - c. Identify the new hire's supervisor and the new hire's manager.
 - d. Schedule an interview for the new hire with company's onboarding manager.
 - e. Identify employee self-serve resources, company website.
4. Equipment and technology setup
 - a. Check and confirm computer, device and office workstation needs.
 - b. Check and confirm mobile device, email, calendar, calendar, calendar, calendar.
 - c. Prepare software, hardware and equipment and IT set up instructions before first day.
 - d. Prepare a request to request hardware and software equipment as needed.
5. New Hire Expenses
 - a. Check and confirm the new hire's and required documents to complete and how to provide to complete it, if it exists.
 - b. Send new hire onboarding checklist to ensure in advance, if possible.



Complimentary Onboarding Checklist

- Email Jennifer at Jennifer@eileenbahn.com to request your copy

Onboarding Toolkit

- Available for purchase for \$697 at <https://luannnigara.com/product/onboarding-toolkit/>

Expert Onboarding Consulting with Jennifer Tokatyan

- Includes Onboarding toolkit, Predictive Index behavioral assessment Inspire Module software for one year and expert support, 5 hours of expert consulting to guide you in onboarding your next employee
- Package rate \$8,247
- Contact Jennifer at Jennifer@eileenbahn.com