

Planning New Employee Onboarding

Onboarding new employees involves creating a plan and then putting it into action.

Creating a Plan

WHAT IS AN ONBOARDING PLAN?

After an employee accepts the job and prior to them starting, create a plan to transition them into the role and onto the team. An onboarding plan needs to be built for the specific level and position of the new employee and reflect the unique work environment of the department/college/unit.



WHY CREATE A PLAN?

While a well-thought out onboarding plan is critical for employee success and engagement, the first day is crucial. It is the moment of truth for employees to form their first impression. A good onboarding plan quickly engages a new employee in the work of the department, college, or unit and:

- Shortens the time it takes a new employee to start performing successfully and contributing to their department, college, or unit;
- Helps a new employee quickly learn how to use their skills, knowledge, and expertise in their role and how to effectively work with their colleagues;
- Demonstrates that your department, college, or unit is well-run and values their employees by being prepared for them when they start;
- Significantly reduces the chances that a newly hired employee will leave shortly after they start or be unable to perform their job.

WHAT AMOUNT OF TIME SHOULD THE PLAN COVER?

Onboarding timing depends on the function of the job which varies based on job level, breadth of the role, experience level of employee, and familiarity with the organization. A common time frame is a 30-60-90 day onboarding plan. This framework is useful, but only as long as it is aligned with the goal of the onboarding process, which is to help the employee become a fully functioning member of the team or department. Rather than focusing on the specific start/stop times of the onboarding elements, focus on moving employees through onboarding at a speed that allows them to be successful.

WHO IS INVOLVED IN THE ONBOARDING PLAN?

The supervisor: The supervisor of the new employee plays the primary role. Some departments/colleges/units have formal onboarding plans while others do not. As a supervisor of a new employee, it is important to connect with your local HR team to coordinate and find out about the available tools, resources, and guidance that they can provide. It is good practice to check in with them before the new employee arrives.

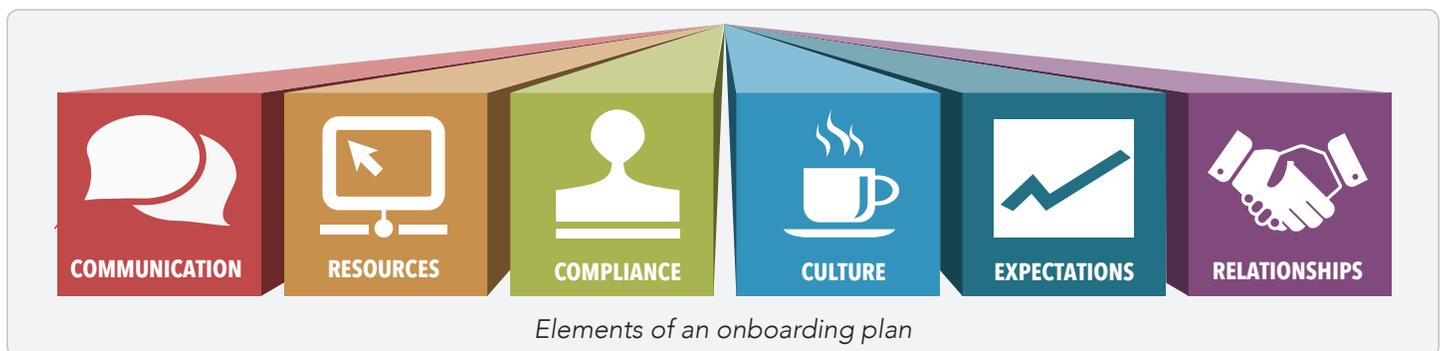
Planning New Employee Onboarding (Cont.)

The team: The new employee's team also plays a vital role in the onboarding process. Your goal as a supervisor is to build an effective team* by clarifying the new employee's role on the team and enlisting their collective help in contributing to the success of the new employee. Discuss and find ways the team can welcome the new employee.

For example, ask one team member to act as the designated go-to person when the new employee encounters problems or has questions. As you create the plan, keep in mind who may/may not actually be in the office the day the employee starts. Is anyone scheduled for long vacation? Or out on a leave?

The new employee: Onboarding is a two-way street. The new employee should take responsibility for learning the details of their role and begin to perform their job duties. In addition, they should be encouraged to ask questions to learn about their role, co-workers, organizational culture and leverage their strengths.**

What should be included in the onboarding plan?



HOW DO I PERSONALIZE THE PLAN FOR THE NEW EMPLOYEE***?

There are key elements in every onboarding plan: communication, resources, compliance, culture, expectations, and relationships. Instead of a one-size-fits-all approach, tailor the plan to the new employee based on:

Their level of experience:

- Are they new to this type of work? Determine what skills they need to develop or what professional development they will need.
- Are they an experienced professional? Could they take on advanced projects? The development that they need will be more advanced. How might they be a mentor for the rest of the team?

Their role:

- Is the new employee an individual contributor? Supervisor/Manager? Faculty? Executive?
- Who are the people they'll interact with and how should they be connected? (i.e., direct reports, colleagues, students, stakeholders, committees, alumni groups, etc.).



* For more information on building an effective team, see **Module 4: Leading Teams** on supervising.umn.edu.

** Share the **Conversation Guide for New Employees** to give them ownership in discovering their new organization and role.

*** Use the Onboarding Worksheet to create your own plan: z.umn.edu/onboardworksheet (**Word Download**)

Planning New Employee Onboarding (Cont.)

HOW DO I PERSONALIZE THE PLAN FOR THE NEW EMPLOYEE? CONT.

The familiarity with the University:

- Is the employee new to the University? Have they previously worked here? Were they a student? Or a transfer from within? Tailor their onboarding plan accordingly:
 - If they are brand new to the University, discuss the University structure, how your department/college/unit fits into the bigger picture, branding, professional groups within the University community, etc.
 - If they are already familiar with the University, discuss which communities of practice they are involved with, what they find helpful, how they would like to contribute (i.e. facilitating/presenting/mentoring).
- Put yourself in their shoes and meet them where they are. Don't make assumptions because they came from within the University. What do they need to know now?

ONBOARDING PLAN ELEMENTS



1. Communication

Once the job offer is accepted, keep in contact with the employee to build excitement for their arrival. This will send a welcoming message and instill confidence about them joining the team.

Before the first day, send a welcome information packet/email. Provide information such as parking, hours, location, directions, dress code, etc. Examples of what to send: a welcome card that everyone on the team signs, a welcome email with links to connect them to information about their role, the team, working for your department/college/unit, etc.



2. Resources

Consider what the new employee needs in order to be productive as quickly as possible. This may include a computer, phone, building access, desk, work area, equipment, special instructions, etc. Make sure this is all requested with enough lead time so it is ready when the new employee arrives on day one. Check with your local HR team for additional details.



3. Compliance

A new employee needs to be aware of the policies and procedures required for their job. Take time to map out which policies, procedures, or safety guidelines they need to know and by when. To determine this, consult the policy library at policy.umn.edu or your local HR team. If possible, spread this information out over a period of time rather than have it all completed on day one.

Planning New Employee Onboarding (Cont.)



4. Culture*

Culture is the shared assumptions, values, and beliefs that determine how the people within a particular organization perceive, think about, and react to each other and events.

Within the first few weeks of a new employee's experience in your organization, you'll want to focus on discussing and helping the new employee learn your organization's culture and norms and how to navigate relationships. For the first few weeks, this is more important than learning the job itself and is crucial to their success. Examples include:

- University/college/unit strategic priorities and discussing how their job/strengths can contribute.
- Jargon/acronyms
- History of the department/college/unit.

Tease out assumptions like:

- Meeting norms and behaviors
- Office space norms
- Lunch
- Dress code
- Joking.



* See the **Quick Guide to Organizational Culture and Onboarding** for more information.



5. Expectations

It is important to clarify expectations about the new employee's role, performance expectations, how to work with you and the team, and developmental opportunities right away.

Start by reviewing the job description to determine a new employee's performance goals and how they will achieve those goals.

Establish regular check-in conversations as part of an effective performance management* process.



* See **Module 2: Managing and Evaluating Performance** for more information.

Planning New Employee Onboarding (Cont.)

ONBOARDING PLAN ELEMENTS (CONT.)



6. Relationships

For an employee to feel connected, they need to establish vital interpersonal relationships and networks. As a supervisor, think about **key partners** (those outside the immediate team or department) that the new employee needs to know or may need to work with (frequently or not) to be successful in their role. Once these connections are identified, provide introductions via email or in-person. To avoid overwhelming a new employee, you might start with three people, and facilitate introductions between them and the new employee. When making introductions, be sure to include:

- Who the person is
- What their role is
- How they can help the new employee
- How the person and the employee will be interacting.

Example: "This is Bob and he has this ROLE and TASK. You will probably work with him/need to reach out to him, when you need to do TASK."

Along with making the introductions with others, it is important for you to foster relationships between you, the new employee, and the team as a whole. From the start, establish regular **ongoing check-in conversations** with the new employee.



Try it! Use the Onboarding Worksheet to create your own plan:

z.umn.edu/onboardwksheet (Word Document Download)