SUPERVISOR'S GUIDE TO

ONBOARDING

A Strategic Workforce Planning Program Resource

Helping new employees get off to a RUNNING START

DHR

Department of Human Resources
County of Los Angeles

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Preface

County executives are the leaders in implementing change management efforts by shaping culture through demonstrating and reinforcing what is valued. The information presented in this *Guide* can assist County executives in making onboarding a departmental priority. Building upon information presented throughout the *Guide*, an Executive Onboarding section is included in this *Guide* to present information that focuses on the needs of new County executive-level staff.

Introduction

Background

The Department of Human Resources' Strategic Workforce Planning program provides resources to help departments achieve the County's Strategic Plan Goal of Operational Effectiveness. As part of this effort, this *Supervisor's Guide to Onboarding* provides information to managers and supervisors about helping new employees quickly adjust to their new jobs and work environments. The steps taken to ease new employees into their roles can have long-reaching effects on their job satisfaction, productivity, and capacity to provide effective service.

Purpose

The purpose of this *Guide* is to present *general information* that can serve as a useful foundation for developing an onboarding process. Specifically, it has been developed to help you achieve the following goals:

- Understand what onboarding is
- Recognize the importance of onboarding
- Create a process for successful onboarding
- Evaluate the impact of an onboarding process

> Research and conventional wisdom both suggest that employees get about 90 days to prove themselves in a new job. The faster these employees **feel welcome and prepared** for their jobs, the faster they will be able to successfully contribute to [the job].
>
> - Society for Human Resources Management
> *Onboarding Employees: Maximizing Success*

Who Should Use This Guide?

This *Guide* was written for you, an individual manager or supervisor seeking to enhance the onboarding process you implement for your new employees. Please make sure you are already familiar with your department's procedures for processing and transitioning newly-hired or newly-promoted employees.

Onboarding Overview

Definition

Onboarding is the process of helping new employees become engaged, productive, and successful members of your team. It includes all of the activities that occur to make them feel welcome and help them transition to their new jobs and work environments. Onboarding should occur with employees in one or more of the following categories:

- **New to the County.** New employees need help becoming familiar with the procedures and culture of the County and your department, division, and/or unit. If it is their first job, they will also need help becoming familiar with the working world.

- **New to your department, division, and/or unit.** While County employees who transfer within our organization already have some familiarity with County culture, they will nevertheless need to understand and adjust to the unique characteristics of your specific department, division, and/or unit.

- **New to a supervisory position.** New supervisors will have as many new procedures and challenges as employees who are new to the County. Onboarding will help guide their transition into a supervisory role.

This *Guide* uses the term "new employees" to represent all of these employees.

How Onboarding is Different from an Orientation

Onboarding is often confused with new hire orientations. Although they occur in a similar time frame, the onboarding process is different from an orientation. The following table highlights the major differences between an onboarding process and a typical new hire orientation.

	Orientation	Onboarding
Duration	Usually a few *hours*, but can sometimes take place over a few *days*	Varies depending on the job and the needs of the employee. It usually continues for at least the first *90 days* to the end of the probationary period, or until the employee is adjusted and fully productive.
Participants	Human Resources representative(s) and new employee	Human Resources representative(s), supervisor, coworkers, and new employee
Organizational Mission	Discussed in *general* or given to the employee to read	Discussed in relation to the employee's *specific* role in achieving the mission
Expectations & Roles	Discussed at a *general* level or not discussed at all	Discussed within the first week in relation to the employee's *specific* role
Methods of Measurement	If included, survey of the new employee's satisfaction with the *orientation*	Turnover rate, time to productivity, satisfaction with the onboarding process, etc.

The Importance of Onboarding

Most new employees begin work with enthusiasm. Ineffective onboarding, however, can cause them to quickly become frustrated. An ineffective onboarding process can include the following:

- Overwhelming amounts of information and paperwork on the first day
- Unavailable workspace and work tools (e.g., computer and supplies)
- Uncertainty over who to approach with questions or concerns
- Unclear or inconsistent work expectations

Proper onboarding helps new employees maintain their enthusiasm. It also can reduce their time to productivity, help prevent turnover, and establish a positive first impression that can be sustained throughout their County careers.

Onboarding Roles and Responsibilities

Several individuals play a role in creating a successful onboarding process:

- Human resources representatives have a supporting role in the onboarding process. In addition to several administrative functions, their responsibilities include helping you coordinate onboarding tasks, overcome onboarding obstacles, and ensure your onboarding process compliments departmental procedures.

- Supervisors (**YOU**) have the *most* important role in the onboarding process because you have the most interaction with new employees. Your responsibilities are the following:
    - ✓ Customize onboarding practices and tools
    - ✓ Select current employees to help guide new employees
    - ✓ Define roles and your expectations for new employees
    - ✓ Check in with new employees to provide feedback and support
    - ✓ Discuss onboarding obstacles and successes with Human Resources Representatives

- Peer Advisors are current employees on your team who help new employees adjust to their new jobs. Peer advisors' responsibilities include the following:
    - ✓ Interpret policies and procedures
    - ✓ Introduce new employees to their coworkers
    - ✓ Advise new employees about challenges they may encounter
    - ✓ Answer questions that are too trivial perhaps for new employees to ask you
    - ✓ Share information about workplace culture, unwritten rules, and office traditions

    Peer advisors for new supervisors offer *informal* guidance on how to perform the following:
    - ✓ Establish credibility as a supervisor
    - ✓ Position initiatives to be accepted in the department, division, and/or unit
    - ✓ Utilize new resources or tools that are now available to the new supervisor
    - ✓ Navigate new work interaction dynamics (e.g., coworkers becoming direct reports)

The case study on the next page illustrates the positive effects of including a peer advisor role in an onboarding program. It also highlights successful implementation of some of the other recommendations described in this *Guide.*

> Organizations with a standard onboarding process experience:
>
> - **54%** greater new hire productivity
>
> - **50%** greater new hire retention
>
> - **Two times** the level of new hire engagement
>
> *- M. Lombardi*
> *The Aberdeen Group*
> *Onboarding 2011:*
> *The Path to Productivity*

Organization
XYZ Corporation

Organization Profile
XYZ Corporation provides communication and aviation electronic solutions. The company employs approximately 20,000 people in over 60 locations worldwide.

The Situation
The company experienced high turnover costs due to a significant number of new hires leaving in their first two years. Leaders within the company began to recognize the need to create a consistent, positive experience for new employees to help them integrate into the workplace.

Initiative
Leaders at XYZ Corporation needed to accomplish the following goals through an onboarding program:

- Create a positive impression of the company.
- Foster a sense of purpose.
- Effectively integrate new employees into the workplace.

Many of the problems new employees were encountering seemed to result from an inconsistent communication approach. To fix this problem and accomplish the program goals, the following methods were developed and implemented:

- Sending welcome letters and information packets containing details about company benefits, policies, and procedures to new employees *before* they begin working.
- Using leader checklists to ensure that workspaces are setup prior to a new employee's arrival.
- Inviting new employees to informal gatherings to introduce them to other new hires.
- Pairing current employee "sponsors" with new employees through a mentoring program that introduces new employees to current staff and helps with the new employees' development.

Results
One year after the program was implemented it was determined to be a success. New hires expressed their satisfaction with the onboarding program. According to one new employee, "Everyone was so helpful in my training that I was immediately making progress and contributing." Existing employees also noticed a difference in new employees. A manager noted, "When I first started at XYZ Corporation seven years ago, there was no computer or phone waiting for me. With a formal onboarding program in place, we've noticed that our new employees begin feeling comfortable right away." Program managers gathered information from all new employees throughout their first year to constantly update and improve the onboarding experience.

Major Components
Of Effective Onboarding

According to the Society for Human Resources Management, there are four distinct "building block" components of successful onboarding programs. It is important to leverage each of them in your specific onboarding process. The components, called the "Four C's," are described below.

	Description
Compliance	Includes teaching employees basic legal and policy-related rules and regulations
Clarification	Refers to ensuring that employees understand their new job and all related expectations
Culture	Includes providing employees with a sense of organizational norms – both formal and informal
Connection	Refers to the vital interpersonal relationships and information networks that new employees must establish

The next section of this *Guide* provides specific guidelines on structuring your onboarding process to include these important components.

GUIDELINES FOR A SUCCESSFUL ONBOARDING PROCESS

Several guidelines for you to consider as you structure your onboarding process are provided below. Using these guidelines as a foundation, customize the onboarding process to reflect the specific needs of the new employee and the unique elements of your department, division, and/or unit. A sample *Supervisor Onboarding Checklist* can be found in **Appendix A** to help you keep track of onboarding tasks.

Preparing for the Onboarding Process

- **Work with your departmental Human Resources representative** to track new employees through the hiring process. This will help you plan when to start the onboarding activities.

- **Begin communicating with new employees *before* they start working.** A personal phone call, email, and/or letter from you at the conclusion of the hiring process can help build or renew new employees' connection with you and their new job, which is particularly important if the hiring process was lengthy.

> ### ONBOARDING TOOLS
> Congratulate new employees on being selected and communicate the following to them:
> - Your enthusiasm about working with them
> - Work site details (e.g., security, parking, public transportation)
> - Information about the dress code
> - Pay information (i.e., when they will receive their first check)
> - Names of the team members with whom they will be working
>
> A sample welcome letter and guidelines for developing one are provided in **Appendix B**.

- **Notify your team that new employees will be arriving soon.** Share introductory information about the new employee (e.g., "Robert Johnson will be joining us as an Analyst. He went to ABC University and has worked for XYZ County") to facilitate initial conversations when the new employee arrives. Additionally, obtain updates from the team about assignments or team projects that will involve the new employee.

- **Select a peer advisor.** This should be a friendly, outgoing, high-performing employee who is knowledgeable about the following:
    - ✓ The new employee's job
    - ✓ Your work style and how the team interacts
    - ✓ The history and culture of the department, division, and/or unit

  Whether you select an employee to fill the role, ask for a volunteer, or divide the responsibilities of the role among several members of the team, ensure that each peer advisor has enough time to properly serve in the role.

- **Prepare peer advisors to fulfill the responsibilities of their role.** Discuss your expectations and emphasize that while the primary purpose of the role is to help new employees, it also demonstrates peer advisors' interpersonal skills. Explain how serving in the role relates to the peer advisors' own career and developmental goals.

> ### Onboarding Tools
> A sample checklist for peer advisors to use can be found in **Appendix C**. It lists their major activities in relation to helping new employees. Customize the checklist to meet the needs of your department, division, and/or unit and provide it to all peer advisors.

- **Prepare a welcome packet** for new employees. The onboarding process should help new employees understand the department's mission, vision, priorities, and culture. Unlike the County of Los Angeles Employee Handbook which provides *general* information for all employees, the welcome packet contains useful reference information tailored specifically to employees in your department and on your team. Example documents to include are listed below.

  - ✓ *Terminology Guide*. New employees often have difficulty understanding what is being communicated to them because the terms are unfamiliar. A terminology guide defines these terms, which helps to lessen this frustration and lead to faster learning.

  - ✓ *Role Relationships Handout*. Unlike an organization chart that outlines general structural/functional relationships, a role relationships handout provides specific, concrete examples of how positions, teams, units, and divisions interact in relation to your team and/or the new employee's position.

  - ✓ New Employee Checklist. There are many administrative activities that new employees must complete during their first weeks on the job. A checklist helps them keep track of these activities and related information.

  - ✓ *Office Floor Plan*. Most new employees perceive a new office to be a confusing maze of cubicles, conference rooms, and hallways that they must navigate. An office floor plan helps guide them from one place to another.

  - ✓ *Map of Surrounding Area*. Just as new employees need help becoming familiar with their surroundings *in* the office, they may need help with their surroundings *around* the office. Knowing where to go for lunch and run errands (e.g., dry cleaners, bank, or post office) can help them feel connected.

> ### Onboarding Tools
> A sample welcome packet can be found in **Appendix D**. It includes examples of each of the documents listed above, as well as guidelines for you to consider as you develop your own materials.

- **Prepare workspaces before new employees arrive.**[1] Not having work tools and a designated space to work can be very frustrating for new employees. It prevents them from being productive and feeling "situated." It also suggests that you did not anticipate or plan for their arrival. Depending on your worksite, a prepared workspace can include the following:

  - ✓ A clean desk
  - ✓ Office supplies (e.g., pens, notepad, stapler, tape, etc.)
  - ✓ A functioning computer and phone
  - ✓ Email and phone directories for the department, division, and/or unit[2]
  - ✓ Equipment operation manuals (e.g., how to set up and check voicemail)
  - ✓ Procedural information about the work of the team (e.g., standard operating procedure and writing style guide)
  - ✓ Any other equipment necessary for the position (e.g., safety gear or uniform)

  A prepared workspace can include the physical objects listed above as well as other tools new employees need to do their work (e.g., email address, Internet access, long distance calling authorization, etc.). Be sure that any forms for acquiring these tools are ready for new employees to complete when they arrive. The sooner these forms can be processed, the sooner new employees will be able to work as fully-functioning members of your team.

  > Best-in-Class organizations realize the significance of starting the onboarding process before new hires begin employment. They are more likely to start the onboarding process upon the acceptance of an employment offer and **before the first day on the job**.
  >
  > - Aberdeen Group
  > *All Aboard: Effective Onboarding Techniques and Strategies*

- **Prepare for discussions with new employees.** To improve onboarding success and ensure that you are prepared to guide new employees through their period of adjustment to the job, take the following actions *before new employees arrive*.

  - *Understand Your Work Style.* Your team must understand and work with your work style (e.g., how you interact with them and involve them in decision-making). Rather than having new employees figure this out through experience, describing your style early during the onboarding process will help them more quickly adjust.

  - *Identify Your Goals and Expectations*. Although your expectations of employee-involvement in goal-setting may change over time, it is your responsibility to determine what new employees will accomplish during their first few weeks or months on the job. You will have different goals and expectations for new employees depending on their position and specific work projects and assignments. Considering this information before new employees arrive will help ensure that they can begin working on achieving some goals and meeting your expectations right away.

    Setting goals that follow the **S.M.A.R.T.** format helps new employees understand what is expected of them. The example on the following page compares two goals in relation to meeting the requirements of this format.

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[1] Human resources will notify and work with you to ensure that the workspace fulfills any reasonable accommodation needs, if required.

[2] Countywide directories are available on the Intranet (http://web.co.la.ca.us/lacounty).

S.M.A.R.T. Goal Example

S.	M.	A.	R.	T.
Specific	**Measurable**	**Achievable**	**Relevant**	**Time-bound**
Clearly state what should be accomplished.	Define how completion will be determined.	Ensure the outcome is attainable.	Relate the outcome to a real need.	Describe a deadline for completion.

GOAL A: **Develop a comprehensive presentation about all your project research.**

Specific	What kind of presentation?
Measurable	What does "comprehensive" mean exactly?
Achievable	Which project? *All* projects?
Relevant	Why? For what audience?
Time-bound	By when?

GOAL B: **Develop 5-8 PowerPoint slides with speaker notes about your Project X research. Discuss the purpose, method, findings, and recommendations. Bill will present the slides at the managers' meeting next Thursday. Email me a draft by 1pm on Monday.**

Specific	PowerPoint slides with speaker notes about Project X
Measurable	Address purpose, method, findings, and recommendations
Achievable	Research for a single project can be summarized in 5-8 slides
Relevant	For Bill to present at the manager meeting
Time-bound	By 1pm on Monday

As you can see from this example, goals that follow the **S.M.A.R.T.** format (i.e., Goal B) are more complete than goals that do not (i.e., Goal A). They provide sufficient detail that helps lead to their successful completion. Especially because the first few months on a new job can be stressful for new employees, they will appreciate that you provide them with this level of detail, as appropriate for their position. It will help them become productive faster, which benefits them, you, and the team.

Additionally, employees who are new Management Appraisal and Performance Plan (MAPP) participants will need assistance developing relevant and effective performance measures that adhere to MAPP standards.

- **Prepare for discussions with new employees (cont'd)**

  - *Determine New Employees' Information Needs*. Different employees have different information needs. Their specific work history will guide what information to convey and how detailed you should be in describing it[3]. Consider the following questions to help you evaluate a new employee's information needs:

    - ✓ How much work experience does this new employee have?
    - ✓ Does this new employee have previous experience in the public sector?
    - ✓ Does this new employee have previous experience in the County?

    The table below describes different types of information new employees may need to understand. Although a combination of individuals can be involved in sharing this information, **YOU** are primarily responsible for ensuring that it is conveyed.

Information Category	Examples
Countywide	Mission, vision, and values ● Organizational structure ● Human resources policies (e.g., absences, holidays, breaks, benefits, etc.)
Departmental	Mission, vision, and values ● Decision-making process/chain of command ● Timekeeping system ● Work schedule options and overtime policies ● Procurement procedures ● Cell phone use/texting policies
Location	Office floor plan ● Parking and public transportation ● Emergency exits/evacuation plan ● Security requirements (e.g., keys) ● Map of the surrounding area ● Water/Coffee club information
Job	Procedural guides ● Career ladder ● Training needs
Team/Work Unit	Your work style ● Review and feedback process ● Regularly-scheduled meetings ● Procedural guides ● Role relationships
Individual Employee	Your goals and expectations ● Role ● Training needs ● Work schedule (including breaks)

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[3] Although work history provides a basis for considering employees' needs *before they arrive*, you may need to modify your approach after observing and working with them on the job.

During the Onboarding Process

The onboarding process usually occurs *at least* during the employee's first 90 days on the job to the end of his/her probationary period, or until the employee is fully productive. The actual time needed will vary depending on the job and the needs of the employee. Below are several activities that you can undertake to facilitate new employees' transition during this period of career adjustment.

- **Set aside time to meet one-on-one with new employees**, particularly during their first few days on the job, to show them that they are important to you. You should use a combination of formal (e.g., scheduled) and informal (e.g., casually stopping by their desks) meetings throughout the onboarding process.

- **Convey information in small, manageable pieces to promote understanding.** Remember that adjusting to the job can be overwhelming for new employees. They will probably not retain what is shared during long, "marathon" meetings in which you cover many topics in-depth. Only discuss information as it is needed and spread the remaining information throughout the onboarding process, if possible.

> Because research shows that the trajectory of a new hire's success is set as early as the **first two weeks**, it is important to make the first day a special one.
>
> - Society for Human Resources Management
> *Onboarding Employees: Maximizing Success*

- **Share stories with new employees.** Stories recount past situations, events, and experiences that can be used as learning tools for new employees. Stories can provide the following benefits:

    ✓ Exemplify organizational values

    ✓ "Bring to life" why certain practices exist, which provides a perspective that may reduce resistance and ease the adjustment to learning something new

    ✓ Illustrate the achievements of individual employees to show you appreciate employees' contributions and to inspire new employees to make outstanding contributions themselves

    When sharing a story, be mindful of its purpose (e.g., to inform, advise, warn, educate, inspire, etc.) and convey it so the message is clear.

- **Define roles by showing new employees how they fit into the "big picture."** New employees often leave organizations because their experience does not match what they expected. When defining roles, be *realistic* and straightforward in specifying how new employees' roles impact the department, division, and/or unit. The Role Relationships Handout is a particularly useful tool for facilitating this discussion.

- **Engage new employees in fun, interesting ways.** Onboarding can include non-traditional methods for helping new employees adjust to their new jobs. Some ideas are described below.

    ✓ Arrange lunches and receptions to provide social networking opportunities. This can help begin the process of building relationships, which is especially important for newly promoted supervisors or managers.

    ✓ Use interactive tools to facilitate learning. For example, create an online "scavenger hunt" to encourage employees to find information about the functions of County departments. These activities are most useful in the first week of employment for employees who are new to the County.

- **Follow-up over the first few weeks or months**. Your goal is to convey information and show support to new employees during the onboarding process and throughout your time working together. Be sure to complete the tasks listed below.

    - ✓ Ask how the employees are managing the workload.
    - ✓ Actively listen to and address any concerns that new employees have.
    - ✓ Discuss whether your and the new employees' expectations are being met.

- **Track performance throughout the probationary period.** Be sure to monitor new employees' performance to ensure they are meeting the needs of the job. Recognize employees for early work accomplishments and help employees maintain the momentum of success. Address performance issues immediately to potentially correct actions before they become patterns.

    Ultimately, the probationary period is the final step in the hiring process and represents the point when the final determination on whether new employees are deemed qualified for their new roles. As the supervisor, it is your responsibility to certify new employees' appointments and to act accordingly within the time-bound evaluation period.

After the Onboarding Process

Below are several activities that you can undertake to evaluate and improve your onboarding process for new employees in the future.

- **Measure the impact of onboarding.** This includes your own assessment of the effectiveness of onboarding employees on your team (e.g., Did it take less time than you expected for the new employee to begin contributing to the work of the team? Are you able to retain new employees?), as well as providing information to help human resources understand the impact of onboarding (e.g., by completing a survey on new employee engagement and productivity).

- **Gather feedback from peer advisors**. Peer advisors can provide useful insight, such as whether any questions new employees ask require lengthy/repeated explanations before the new employees grasp them. This may indicate that more training is needed and/or that there are some areas new employees find challenging.

- **Gather feedback from new employees**. Solicit new employees' suggestions for improvements to the onboarding process, as they will have a different perspective after being on the job for a while. Asking for this kind of feedback demonstrates to new employees that their opinions are valued. Implement employees' reasonable and valuable suggestions to ensure continuous improvement of your onboarding process.

Executive Onboarding

This *Guide* discusses onboarding guidelines and activities that are useful for and applicable to most position levels throughout the County (i.e., entry-level to upper management). However, new employees in executive positions can also benefit from planned and meaningful activities to assist them during their periods of career transition and adjustment. Executive onboarding differs from traditional onboarding because of the unique challenges new executives face. For example:

✓ New executives are often hired or promoted to implement strategic initiatives that require changing the status quo rather than fitting into it.
✓ They must navigate among widely competing stakeholder agendas and pressures to accomplish work for the organization.
✓ New executives are often confronted with a "sink-or-swim" expectation based on having already acquired a high-level of experience and expertise.

Executive onboarding must prevent executive derailment and expedite the executive's contribution to optimizing strategic achievement. In addition to implementing an onboarding process as previously described in this *Guide*, managers of new executive-level employees can benefit from implementing the following additional guidelines:

- **Explain situational nuances** to help the new executive grasp the often unwritten rules and practices that impact the leading of a department. Provide and discuss all relevant information that will orient the new executive and enable him/her to make strategic decisions early. This information can include the following:
  ✓ organizational history and characteristics
  ✓ departmental mission, vision, and strategic objectives
  ✓ key metrics, regulatory guidelines, and authority structures
  ✓ human resources, budget, and contracts procedures
  ✓ norms of communication
  ✓ biographies and resumes of senior-level direct reports

- **Facilitate relationship-building with key stakeholders** by assigning a senior-level mentor/sponsor/coach who can perform the following:
  ✓ make formal introductions to direct reports and senior staff
  ✓ introduce the new executive to external stakeholders
  ✓ arrange formal/informal meetings with senior staff to share knowledge and build trust
  ✓ create regular networking opportunities

- **Clarify performance goals and objectives** by outlining individual and department performance expectations, communicating issues requiring immediate attention, identifying constraints and likely barriers to performance, providing feedback, and facilitating leadership development.

> Estimates of outright failure in the **first 18 months** range from 38% to over half, and many more executives fail to be as successful as was predicted in the hiring or promotion phase.
>
> When leaders in a new situation don't build the right kind of foundation **early in their incumbency**, they may never get the right traction.
>
> Organizations can increase the number of leaders who become powerfully effective…by **equipping them with resources and programs that maximize their integration**.
>
> - Center for Creative Leadership
> *Executive integration: Equipping transitioning leaders for success*

The case study below illustrates the positive effects of an executive onboarding process.

Organization
ABC Corporation

Organization Profile
ABC Corporation is the second largest bank holding company in the United States by assets. The company employs approximately 290,000 full-time associates.

The Situation
The banking and financial services industry average for executive derailment is 40 percent.

Initiative
Between 2001 and 2006, the company hired 189 external executives, and more than 200 internal candidates went through a formal executive onboarding process. The company has three major goals for its executive onboarding program:

- Minimize the high costs of executive derailment
- Accelerate executive performance results
- Facilitate a smooth integration experience for new executives.

The executive onboarding program incorporates the following:

ONBOARDING TOOL	PURPOSE	TIMING
WRITTEN ONBOARDING PLAN	Helps new executives organize and prioritize the onboarding process	Provided during first week
LEADERSHIP TOOLS	Helps new employees understand the leadership frameworks at the company	Provided during first week
KEY STAKEHOLDER MEETINGS	Allow for important flows of information and for expectation setting	During first two months
NEW LEADER-TEAM INTEGRATION	Helps accelerate the development of relationships between the new executive and his/her team	During first 2-3 months
NEW PEER INTEGRATION	Helps accelerate the development of relationships between the new executive and the rest of the executive team	During first 2-3 months
STAKEHOLDER CHECK-IN MEETINGS	Help diagnose potential problems, receive developmental feedback, and create solutions	During first 3-4 months
EXECUTIVE NETWORKING FORUMS	Help new executives connect and network with other executives	Held quarterly

Results
The organization now has an executive success rate of 88 percent.

Conclusion

This *Supervisor's Guide to Onboarding* has defined and outlined the importance of onboarding, including differentiating it from an orientation. Through the two case studies provided, the *Guide* has illustrated effective onboarding implementations at other organizations. In describing the roles and responsibilities of the individuals involved in making an onboarding process successful, the *Guide* has presented onboarding as a collective approach to integrating employees who are new to the County, new to a department/division/unit, and new to supervisory roles. As described, onboarding is important not only for line staff, but also for new supervisors, managers, and executives.

Using the framework and customizable tools provided in this *Guide* can help you implement an onboarding process that incorporates the four major components for effectiveness (i.e., compliance, clarification, culture, and connection). Intentional and meaningful onboarding efforts will enhance your new employees' engagement, job satisfaction, and most importantly, their career success. We encourage you to use the principles, guidelines, and tools described in this *Guide* to give your employees a running start to a bright future.

Appendix A

Supervisor Onboarding Checklist

1. **Before the New Employee Arrives**
   - ☐ Call, email, and/or send a letter to welcome the new employee and provide necessary information for his/her first day of work.
   - ☐ Create your onboarding welcome packet.
   - ☐ Select a peer advisor.
   - ☐ Ensure that your staff knows when the new employee is arriving.
   - ☐ Obtain brief status updates of projects that will involve the new employee.
   - ☐ Ensure that a work space is prepared.

2. **On the New Employee's First Day**
   - ☐ Welcome and set aside time to meet one-on-one with the new employee.
   - ☐ Encourage the new employee to ask questions and voice his/her concerns. Make sure to be available to provide answers in a timely manner.
   - ☐ Introduce the new employee to his/her peer advisor.

3. **During the First Week**
   - ☐ Have work assignments ready so that the new employee can feel productive right away.
   - ☐ Discuss goals and training schedule. Help remove any obstacles that may make the goal unattainable.
   - ☐ Make sure that the peer advisor and the new employee are meeting.
   - ☐ Ensure that the new employee is obtaining key information (e.g., benefits, timecards, departmental communications, etc.).

4. **Throughout the First 90-days to the End of the Probationary Period**
   - ☐ Meet regularly with the new employee to discuss achieving and setting new goals; the employee's work pace; and how the employee is adjusting.
   - ☐ Consistently provide positive and constructive feedback to help the new employee keep his/her performance on track.
   - ☐ Be available to answer questions or address concerns.
   - ☐ Ensure the new employee is meeting all necessary personnel.
   - ☐ Determine whether or not the new employee's expectations are being met. Discuss specific experiences and examples.
   - ☐ Ask for feedback regarding the onboarding process and the new employee's experiences.

Sample Welcome Letter

COUNTY OF LOS ANGELES
DEPARTMENT OF SPECIAL SERVICES
HEADQUARTERS
1234 MAIN STREET • LOS ANGELES, CALIFORNIA 90012
(213) 555-2406 • FAX (213) 555-0387

SUSAN JONES
SPECIAL SERVICES DIRECTOR

August 27, 2015

Robert Johnson
4567 Center Street
Los Angeles, CA 90010

Dear Robert,

Congratulations and welcome to the Research Unit of the Department of Special Services! I am looking forward to being your new supervisor and working with you on your projects and assignments. Your first day of work is coming up very soon, and I want to give you some information to help you get ready.

I have been informed that your orientation with human resources is at 8:30 am on Wednesday, September 16 at headquarters (you should have already received notice and instructions from them). Please report to our office at 6789 Main Street immediately after the orientation ends.

If you are driving to our office, you can park in one of the visitor spaces near the entrance to the building. We will issue your parking decal and gate card for the employee parking lot before the end of the day. If you are taking public transportation, the Main Street and Victory stop is the one closest to our office.

When you arrive, check-in with the receptionist and wait in the lobby. Mary, Lynn, Ryan, and Paul are all excited that you are joining our team, and one of them will come to the lobby to greet you. I will meet with you sometime after you get settled in your new workspace. We will discuss your work schedule when we meet, but expect your first day to end at 5:00 pm.

Also, just to let you know, everyone in the office will be wearing jeans on September 16 in support of a "Blue Jeans for Babies" charity event. If you like, feel free to dress accordingly that day. Traditional business attire is expected otherwise.

Lastly, I wanted to inform you about our payroll system so you can make any necessary plans. Unfortunately, it takes a few weeks to get new employees processed in the system. Since September 16 is your first day, you will receive your first paycheck on October 15. It will be for a full month's salary.

I hope that this information is helpful. If you have any questions, call me at (213) 555-9412 or email me at hilaryjacks@ssd.lacounty.gov. Otherwise, see you on the 16th!

Sincerely,

Hilary Jackson

Hilary Jackson
Special Services Assistant Director

Guidelines for Developing a Welcome Letter

1. The tone should be professional, but still friendly and personal. Try not to make it sound like a form letter.

2. Convey your excitement about working with the new employee.

3. Include relevant details about the following:
    *   Parking and public transportation
    *   Security measures
    *   Dress code
    *   Work schedule for the first day
    *   Pay information (i.e., when they will receive their first check). Many new employees are frustrated to find out that it will take them a full month to get paid. The sooner they can be informed of this, the sooner they can make any necessary financial plans or arrangements.
    *   Special events taking place on the new employee's first day. You want the employee to be able choose to participate in these events and not "stick out" from the rest of the team.

4. Include the names of the people with whom the new employee will be working. This will help the new employee begin remembering names. "Putting a face to a name" is easier than trying to keep track of new names <u>and</u> new faces on the first day.

5. Encourage the new employee to contact you with any questions or concerns.

Appendix C

Peer Advisor Onboarding Checklist

Introduction: The goal of onboarding is to help new employees quickly become successful members of your department, division, and/or unit. As a peer advisor, you will serve as a resource for new employees to help them in this process. Use this checklist to ensure that you are completing the necessary activities.

☐ Take the new employee on a tour of the facilities, including break rooms, restrooms, copy rooms, and emergency exits.

☐ Share information about how office snacks and beverages are obtained (e.g., if they are purchased by an employee group or if it is a "pay as you go" system).

☐ Explain how to use office machines such as the copier or scanner.

☐ Show where supplies are kept and explain procedures for obtaining them.

☐ Explain the building security procedures.

☐ Share information about unwritten office rules or departmental traditions such as casual Friday.

☐ Explain any voluntary office programs that are currently taking place (e.g., wellness programs) and inform the new employee how he/she can take part.

☐ Share information about formal and informal social activities that take place outside of work, such as recreational sports teams.

☐ Share information that you found helpful as a new employee.

☐ Be available for questions from the new employee.

☐ Give honest answers and maintain confidentiality when appropriate. For example, you do not need to tell your supervisor about a minor embarrassing incident that happens when the new employee is learning or doing something new. However, you should report any major violations that have significant impact on the new employee, other employees, the County, or your department, division, and/or unit.

☐ Remember that the new employee's work styles may not be like your own and that he/she does not have to perform a task exactly as you would.

☐ Use your experiences to inform the new employee of any challenges unique to his/her role.

If you are a peer advisor for a new supervisor, complete the following additional activities:

☐ Advise on how to build new relationships with previous peers who are now direct reports.

☐ Advise on how to manage more ambiguous tasks or assignments.

☐ Explain how quickly changes can be implemented and accepted within the County and/or the department, division, and/or unit.

☐ Help establish connections with important personnel central to the new supervisor's role (e.g., upper management and other supervisors).

☐ Provide honest feedback about how work styles between the new supervisor and the direct reports are fitting together or conflicting.

☐ Set-up meetings to introduce the new supervisor to important personnel within and outside of your department.

Sample Welcome Packet

Terminology Guide
Research Unit • Department of Special Services

> Welcome! As you interact with us to complete your projects and assignments, we may occasionally use terminology that is unfamiliar to you. To help you get "up to speed" quickly, we have compiled this list of explanations for commonly used terms. We hope that you find it useful as you adjust to working on our team. Please let us know if there are any terms that we forgot to include so that we can update this list.

9/80: An alternative work schedule where you work 80 hours over 9 business days and take the 10th day off. The 10th day is called your RDO.

AP: Appraisal of Promotability. These are evaluations that supervisors complete for employees applying for promotions. There are two kinds of APs: Commentless (CAP) and Traditional (TAP).

Board: *"This came down from the Board."* The County Board of Supervisors. These five elected officials govern the County. Board assignments have priority over most other assignments.

CSR: Civil Service Rules. These are the legal guidelines that direct how we carry out the County's human resources function. They help ensure our processes are fair. They rarely change.

DHRM: Departmental Human Resources Manager. The Director of Personnel delegates these individuals the authority to perform many human resources functions for their departments.

DPSS: Department of Public Social Services (a list of other common department acronyms is provided in your welcome packet). Frequently, when we use this term, we are referring to the physical location of a nearby DPSS office. It is down the street at 3435 Wilshire, and we often use rooms there to conduct job analysis studies, written tests, and interviews.

DSS: Department of Special Services. Your department! The best place to work!

Master Calendar: Normally, we use this term to reference examinations run on a regular schedule because there are on-going, continuous hiring needs for these job classifications (e.g., Intermediate Typist Clerk) across multiple County departments. Exams that are not Master Calendar generally have only occasional hiring needs and/or one department that hires the job classification.

RDO: Regular day off. You earn one RDO for every two-week period that you work on the 9/80 work schedule (see 9/80). Most of us have our RDOs on Fridays, but you may be able to choose another day.

Run: *"Who is running the exam?"* This refers to the department that administers a particular examination (e.g., posts the bulletin; accepts and reviews the applications; contacts the applicants; etc.). Sometimes it also refers to the specific analyst within the department who is in charge of these activities.

Page 1 of 6

Sample Welcome Packet

Role Relationships Handout
Research Unit • Department of Special Services

This handout describes employee roles an **Analyst** interacts with while performing typical job duties.

Role	Primary Interaction(s)	The Results
Department Head *Oversees all functions of a department.*	• You may provide periodic written or verbal updates to Department Heads regarding high-level, high-priority, or sensitive examinations.	The Department Head is apprised of critical information about filling important vacancies.
Departmental HR Manager (DHRM) *Oversees the HR functions in a line department.*	• DHRMs request our services for job analysis and test development projects for their departments. • You provide DHRMs with criteria for selecting subject matter experts for these projects.	You will have appropriate subject matter experts for your projects.
Exam Analyst *Administers the exam process.*	• You provide exam analysts with current and historical information about job analyses and tests. • You may also answer questions or provide information to help them conduct job analyses or train raters.	This helps Exam Analysts create job bulletins and coordinate various aspects of the exam process.
Subject Matter Expert (SME) *Provides accurate job information*	You will work with SMEs during your job analysis and test development projects. They provide information to help you understand the job.	The tests you develop will accurately reflect the requirements of the job.
Appeals Unit *Investigates and responds to formal appeals about the exam process*	Appeals staff ask you to provide information about job analyses and tests as part of some of their investigations.	This helps the Appeals Unit effectively respond to candidates' appeals.
Budget Unit	• DHRMs provide our budget unit with financial information and payment for our services. • Budget staff provide billing codes for you to use on your timecard to track hours spent on projects.	Departments are billed and our department is paid appropriately for the work that you perform.

Sample Welcome Packet
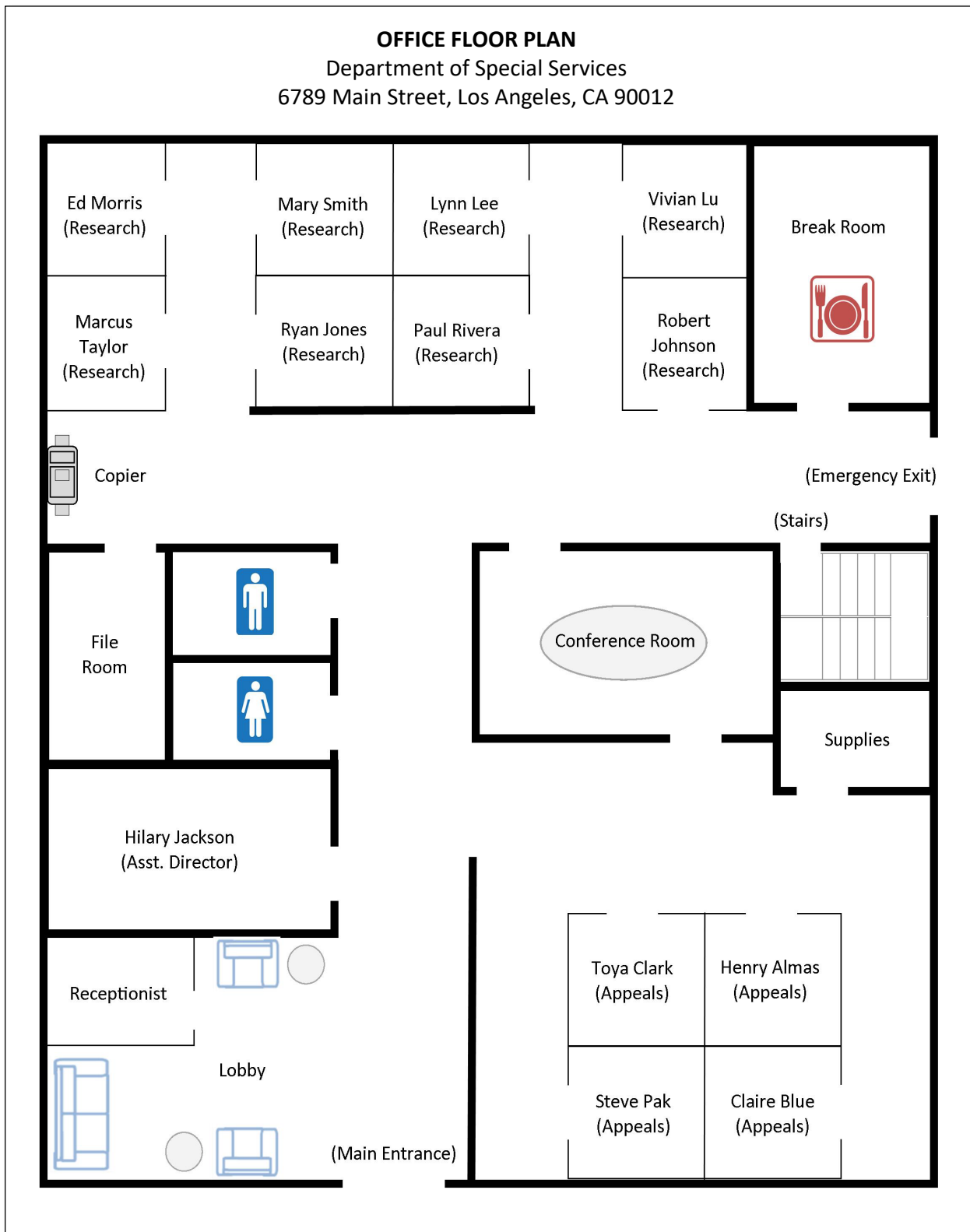
New Employee Checklist
Research Unit • Department of Special Services

New employees often receive an overwhelming amount of information in the first few days on the job. The purpose of this checklist is to help you keep track of the information you have received and the information you still need to obtain. Most of these items will be covered within the first week; however, it may take up to the first month of employment to complete the list.

☐   Date of new employee orientation: _____

☐   Receive employee handbook

☐   Receive employee directories (e.g., phone and email)

☐   Fill out State/Federal Tax forms and I-9 form
       Contact Name: _____   Phone/Email: _____

☐   Fill out direct deposit form (Optional)
       Contact Name: _____   Phone/Email: _____

☐   Deadline for completing the Sexual Harassment Training via the Learning Management System: _____

☐   Employee Benefits
       Orientation Date: _____   Deadline for Enrollment: _____
       Contact Name: _____   Phone/Email: _____

☐   LACERA (Los Angeles County Employees Retirement Association)
       Orientation Date: _____   Deadline for Enrollment: _____
       Contact Name: _____   Phone/Email: _____

☐   Work schedule: _____

☐   Find out procedures for reporting an absence

☐   Receive identification card

☐   Obtain parking decal and/or make public transportation arrangements

☐   Complete and obtain required signatures for forms concerning work equipment and tools (e.g., email address and Internet access), as needed

☐   Receive employee number

Sample Welcome Packet

OFFICE FLOOR PLAN
Department of Special Services
6789 Main Street, Los Angeles, CA 90012

| Ed Morris (Research) | Mary Smith (Research) | Lynn Lee (Research) | Vivian Lu (Research) | Break Room |

Marcus Taylor (Research)

Ryan Jones (Research)

Paul Rivera (Research)

Robert Johnson (Research)

Copier

(Emergency Exit)

(Stairs)

File Room

Conference Room

Supplies

Hilary Jackson (Asst. Director)

Receptionist

Toya Clark (Appeals)

Henry Almas (Appeals)

Lobby

Steve Pak (Appeals)

Claire Blue (Appeals)

(Main Entrance)

Sample Welcome Packet

Nearby Restaurants

1. Camy's ($)
2. Koko's Pizza & Chicken ($)
3. Café Metropolis ($)
4. Subway ($)
5. The Boiling Crab ($$)
6. King of New York Pizzeria ($)
7. Tomatillo Mexican Grill ($)
8. Chipotle ($)
9. Denny's ($)
10. IHOP ($$)
11. Jack in the Box ($)
12. Hao Chi Kitchen ($)
13. Seongbukdong ($$)
14. My Thai ($$)
15. Spoon and Chopsticks ($)
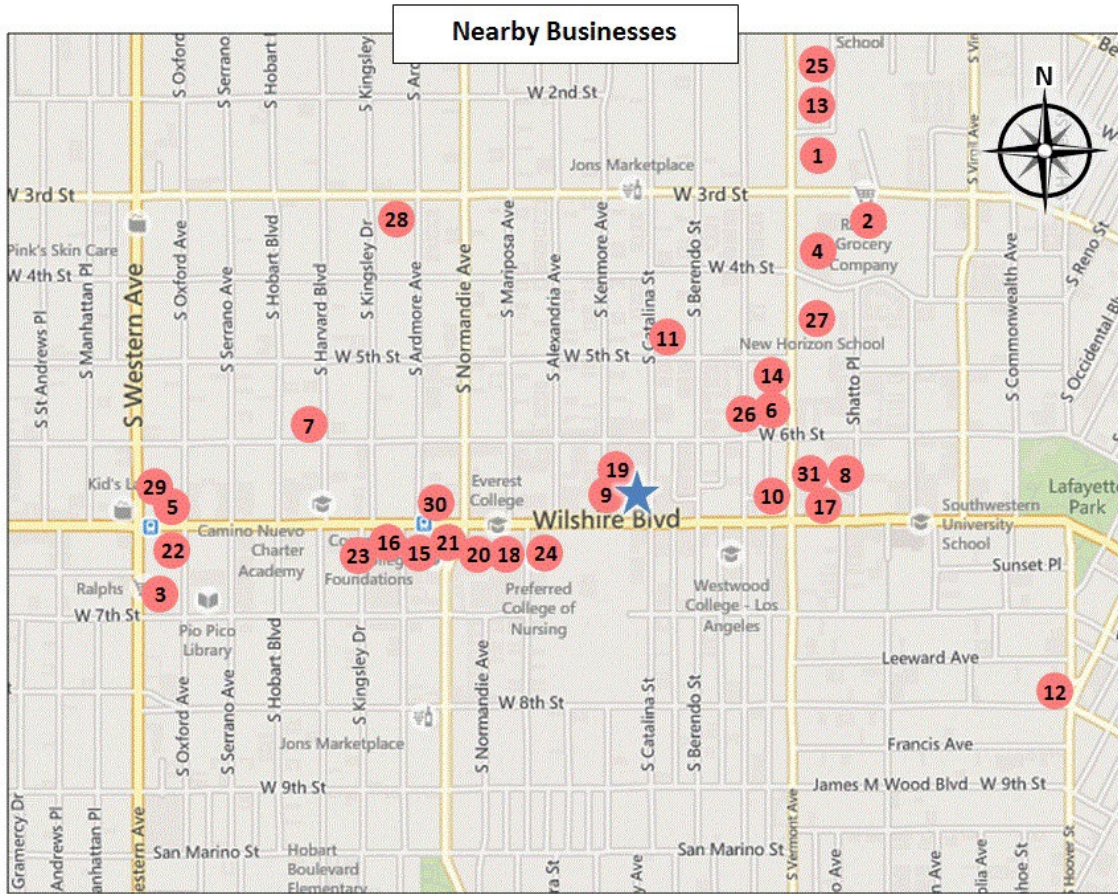16. Anima Pizza and Pasta ($$)
17. Paris Baguette ($)
18. Star BBQ ($$)
19. Carl's Jr ($)
20. Togo's ($)
21. Avenue 2 Grill ($)
22. Bistro on the Boulevard ($)
23. Simply Pho You ($$)
24. Ondal ($$)
25. Soot Bull Jeep ($$)
26. Jun Won Restaurant ($$)
27. Taco Bell ($)

($) = Under $10   ($$)= $11 - $30

Sample Welcome Packet

Grocery Stores
1. Vons
2. Ralphs
3. Ralphs

Pharmacies
4. Rite Aid
5. CVS
6. Walgreens

Post Office/Shipping
7. U.S. Post Office
8. UPS Store
9. FedEx

Gas Stations/Auto Care
10. Shell
11. Chevron
12. 76 Auto Care
13. AutoZone
14. V5 Car Wash

Banks
15. Citibank
16. Wells Fargo
17. Chase
18. Bank of America
19. Bank of the West

Cell Phone Carriers
20. Verizon
21. Sprint
22. AT&T
23. T-Mobile

Other Stores
24. Big 5 Sports
25. Radio Shack
26. Staples
27. Galleria Cleaners
28. Angel Cleaners

Metro Stations
29. Wilshire/Western
30. Wilshire/Normandie
31. Wilshire/ Vermont

Guidelines for Developing a Welcome Packet

Terminology Guide
- Tell the employee why you are providing the guide and ask for help improving it. Ask members of your team what terms should be described and how to define them.
- When possible, include a reference to how the employee might actually hear the term used (e.g., "This came down from the Board" in Board definition).
- Instead of just stating "what" the term means, include details like history and future direction to provide perspective (e.g., "…rarely change…" in CSR definition).
- Refer to other terms on the list and materials in the welcome packet to enhance learning.
- Try to maintain a light, conversational tone in the document (e.g., "The best place to work!" in the DSS definition). However, be sure to remain professional.
- Interpret what the term really means to the employee in a practical, meaningful way (e.g., "Frequently, when we use this term…" in DPSS definition).
- Provide details about the team to help the new employee learn about and fit in with the culture (e.g., "Most of us have our RDOs on Fridays…" in RDO definition).
- Include all commonly used terms, even if the guide becomes lengthy. For example, the guide developed for one unit in the Department of Human Resources has more than 46 entries.
- Alphabetize the terms for easy reference.

Role Relationships Handout
- Have current staff track all of their interactions for a given period of time to determine what roles to include on the handout.
- Order the role relationships according to frequency of interaction (i.e., role with most interactions are listed first).
- Describe the results of the interaction in relation to achieving a goal or directive of the operation.
- Include names and contact information for the employees in each role, if possible.

New Employee Checklist
- Ask members of the team what items should be included on the checklist and ask for feedback from new employees about improving it.

Office Floor Plan
- Label cubicles and offices with the name of the employee who sits there.
- Include the new employee's name and cubicle location.
- Include other units, sections, and divisions that occupy the same office space.
- Designate emergency exits, break room/lunchroom, copy room, conference rooms, etc.

Map of Surrounding Area
- Internet mapping websites (e.g., Google Maps) are useful tools for creating and customizing maps.
- Survey your current staff for restaurant or other business recommendations.
- Include relevant information such as price, type of food, distance from office, etc. to make the map truly useful for new employees.

Appendix E

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APPENDIX F

Authors

Angela C. Hawkins, Human Resources Analyst IV
Angela holds an MBA and has over 13 years of public-sector human resources experience involving succession and workforce planning; recruitment and selection; survey and training program development and implementation; and other human resources activities. She has presented at a regional conference sponsored by the International Public Management Association – Human Resources and has been published in its publication.

Marc C. Shartzer, Principal Human Resources Analyst
Marc holds an M.S. in Industrial/Organizational Psychology and professional certificates in Human Resources Management, Project Management, Technical Writing, and Business Management. He has over 15 years of professional experience in public, private, and consulting organizations. His areas of practice include selection research and test development, succession and workforce planning, organizational surveys, recruitment, training, compensation administration, and other human resources activities. He has presented at regional and international conferences and has been published in professional journals.

David Miller, Human Resources Analyst IV
David holds an M.S. in Industrial/Organizational Psychology and has 5 years of public sector experience involving recruitment, exam development and administration, classification, compensation, training, and agency-wide research. He has presented at a regional conference and has been published in professional journals.