A large, faint watermark of the County of Mendocino seal is visible in the background. The seal features a circular design with the text 'MENDOCINO COUNTY' and the year '1850'.

County of Mendocino

# ONBOARDING GUIDE

An Employee Engagement Team Resource for Supervisors & Managers



Helping Employees Get off to a Running Start



## Congratulations on Your Hire!

Congratulations on hiring your new employee! We know this can be a busy time for both you and your new hire, so we've done some work for you and put together this Onboarding Guide. In this guide you will find best practices, tips and links to more online resources and templates to guide you through the onboarding process.

Please review the material provided and feel free to contact the Employee Engagement Team via email @ [employee-engagement@mendocinocounty.org](mailto:employee-engagement@mendocinocounty.org) if you aren't finding the assistance needed.



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# WHERE TO START

This *Guide to Onboarding* provides information to managers and supervisors about helping new hires 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.

## 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 begins with the job offer, includes new hire orientation provided by Human Resources and continues with the department for 3-12 months afterward.

## Introduction

Onboarding at the County of Mendocino should be an engaging experience designed to make the new employee feel welcome in their surroundings, and minimize the time it takes to become productive members of their department. It begins before the new employee steps foot on our campus with preparing the new employee's workspace. It continues with designing a first-day schedule that intentionally connects the new employee with existing team members to help them get acclimated, and includes setting short and long term goals that include relevant training and development opportunities.

Our goal is to positively impact employee success through this new onboarding program by retaining a highly competent and engaged workforce. As the supervisor, we need your assistance in providing your new employee with an onboarding experience that will set them up for success in their new role at the County of Mendocino.

## The Importance of Onboarding

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.



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

- Overwhelming amounts of information 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



Onboarding is a prime opportunity for employers to win the hearts and minds of new employees. It is the magic time when new employees decide whether to stay engaged or become disengaged.

# WHERE TO START

## Purpose

The purpose of this *Guide* is to present *general information* that can serve as a useful foundation for developing an onboarding process unique to your department. 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

## Who Should Use This Guide?

Managers, Supervisors and Peer Guides can benefit from using this guide for employees who are:

- **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.



Organizations with an onboarding process experience 54% greater productivity

## Guidelines For a Successful Onboarding Process

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.



and 50% greater employee retention!



Download the sample [Onboarding Checklist](#) to help you keep track of onboarding tasks.

# BEFORE YOUR NEW HIRE STARTS



69% of employees are more likely to stay for 3 years if they experienced great onboarding

Retention starts at recruitment. Hiring the right candidate is the first step in the onboarding process. When a candidate has been selected, the onboarding process starts. Once the candidate accepts the position, the manager/supervisor can begin planning for the new employees first day/week.

A great deal of the work necessary to successfully onboard a new employee is done before the employee's first day. Some of the suggested actions to "prepare" for a new employee are

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

## 1. Put Yourself in Their Shoes

Pretend you are new and think about what you would expect or like to happen on your first day and create a plan accordingly. We often become so engrossed in our own roles that we can barely remember the time when we weren't deeply acquainted with the people, processes, and products that make our businesses work. Being the new hire in the office, much like being the new kid on the block, isn't easy. Put yourself in their shoes and empathize with the stress of walking into a new environment where everyone already knows each other and shares a common bond.

## 2. 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. 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

Download the [Sample Welcome Letter](#) to get started.



## 3. Notify Your Team That a New Employee Will Be Arriving Soon

Share introductory information about the new employee at least 1 week before their arrival to facilitate initial conversations when the new employee arrives (e.g., "Robert Johnson will be joining us as an Analyst. He went to ABC University and has worked for XYZ County").

Existing employees are more likely to assist in onboarding if they are informed of a new hire. Sending an email to staff regarding a new hire not only lets them know who is starting and when, it also welcomes the new employee. Additionally, obtain updates from the team about assignments or team projects that will involve the new employee.

# BEFORE YOUR NEW HIRE STARTS

## 4. 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 Mendocino 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.

**Org Chart.** Providing new hires with organizational charts can alleviate a number of problems with the onboarding process. First and foremost, it gives the new employee a better understanding of the structure of your organization, which can be a bit difficult to understand during your first days with the company. For that reason, it improves a new hire's ability to communicate effectively from day one. They will have a much better idea of who to go to with a specific problem. With a better understanding of the structure of different departments, they can take it upon themselves to build beneficial relationships that help improve their chance of success.

**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.

**Phone List.** A general County-wide department directory is provided to new employees in their Employee Handbook provided at orientation. Providing a departmental directory allows the employee to hit the ground running when they have a question in their first days or weeks of employment.

**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.

**Campus Map.** For larger locations, providing new hires with a map of the County of Mendocino campus their department is located within will give the employee a greater sense of other departments located in their vicinity. This knowledge may come in handy as their department networks with other County of Mendocino departments.

**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.



Download the [Sample Welcome Packet](#). It includes examples of each of the documents listed above, as well as guidelines for you to consider as you develop your own materials.

# BEFORE YOUR NEW HIRE STARTS

## 5. Prepare Workspaces Before They Arrive

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
- 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.

## 6. Arrange a Helping Hand Through a Peer Guide

This should be a friendly, outgoing, high-performing employee who has enough time to properly serve in the role and 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

90% of employees  
decide if they will stay  
with a company in their  
first 6 months



Download the [Sample Peer Guide Checklist](#). 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 Guides.

Rather than setting new employees up for success, organizations with poor onboarding processes are setting the stage for an early exit. Nearly 33% of all new hires quit their jobs within the first 6 months.



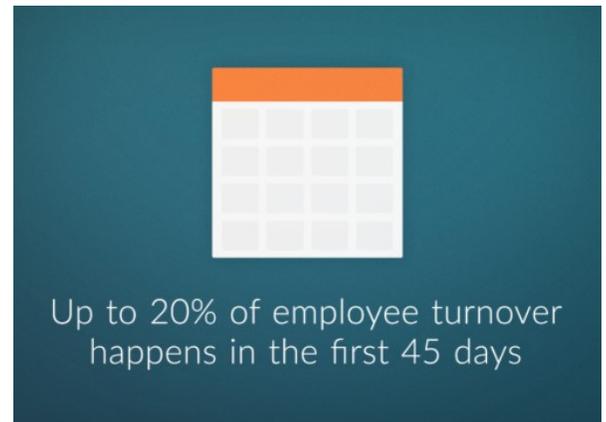
# DURING THE ONBOARDING PROCESS

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.

## 7. Make Their First Day Special

Most companies actually celebrate more when employees leave the company than when they arrive. New employees want to feel like they have chosen a company who is excited to have them on the team. Onboarding is the perfect opportunity to make a positive lasting impression on a new employee. Often hires may experience "new job remorse". An effective onboarding program recognizes this reality and works to create a dynamic motivational atmosphere that erases employees' doubts and concerns, leaving them confident that they made the right decision. Some practical ideas for consideration include:

- Give them a welcome card signed by the whole office
- Arrange an office potluck or consider taking them out to lunch
- Roll out the welcome mat and give them a small welcome gift such as a plant, coffee, mug, flowers or welcome sign
- Treat their first day as a celebration rather than an administrative task
- Check-ins and making people feel like their contributions matter are all great ways to ensure that your new hires feel seen and heard and it costs nothing



## 8. Define Expectations, Roles and Explain The Training They Will Receive

- **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. 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?
- **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.
- **Identify Goals & 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. 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.

# DURING THE ONBOARDING PROCESS

## 9. Set Aside Time to Meet One-on-One With New Employees

Particularly during their first few days on the job, set some time aside to have frequent one-on-one meetings with new employees 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.

At the end of each day in the first week, schedule time to check in with the employee to inquire how their day went. Encourage the employee to ask questions, and allocate sufficient time to listen and address questions the employee may have. You can also use this time to get to know the employee better (E.g. Explore work styles, and how the work style will complement each other and the work of the team.)

## 10. Stay Connected, Show Support & Solicit Feedback

- **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.
- **Show Continued Support.** The first six months of employment are crucial to an employee's retention with an organization. Once an employee has been with the organization for six months, he/she should have a good idea of the organization as well as his/her role and responsibilities. After the first six months, initial excitement about being part of a new organization may wane. Managers/ supervisors need to continue to develop staff to ensure they are connected and committed, that their opinions matters, and their contributions are being appreciated and recognized. Encourage your employees to take advantage of the variety of training options available to them through Human Resources to continue their growth and development.
- **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.



Effective onboarding can enhance employee engagement, increase productivity and ultimately, lead to higher rates of retention. Don't take a sink or swim approach to onboarding your new hires. Start early and touch base often to give your employees the kind of employment experience they won't want to leave.

# 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.
- **Gather feedback from Peer Guides.** Peer Guides 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.

# CONCLUSION

Intentional and meaningful onboarding efforts will enhance your new employees' engagement, job satisfaction, and most importantly, their career success. We encourage you to use these principles, guidelines, and tools in this Guide to give your employees a running start to a bright future.



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