

## Summary of Comments on Onboarding\_II\_printable.pdf

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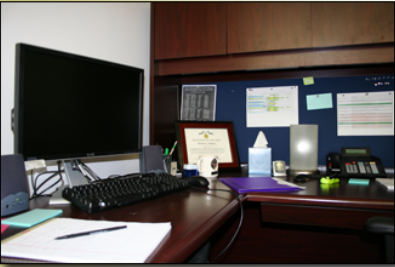


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Module 2: Performance Management

Lesson 1: Onboarding



### Lesson Welcome

Welcome to the lesson on Onboarding. As a supervisor, it is important to make the right first impression about your organization to new employees. The purpose of this lesson is to provide you with information about the human resource tool of onboarding new employees.

### Lesson Learning Outcomes

1. Define the term onboarding
2. Explain the four levels of onboarding
3. Discuss the role of the employee, the manager and organization in the onboarding process

*Click the Next button to continue.*

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Module 2: Performance Management Lesson 1: Onboarding

Supervisor Scenario



Click to view To Do List.

Click to review your team.

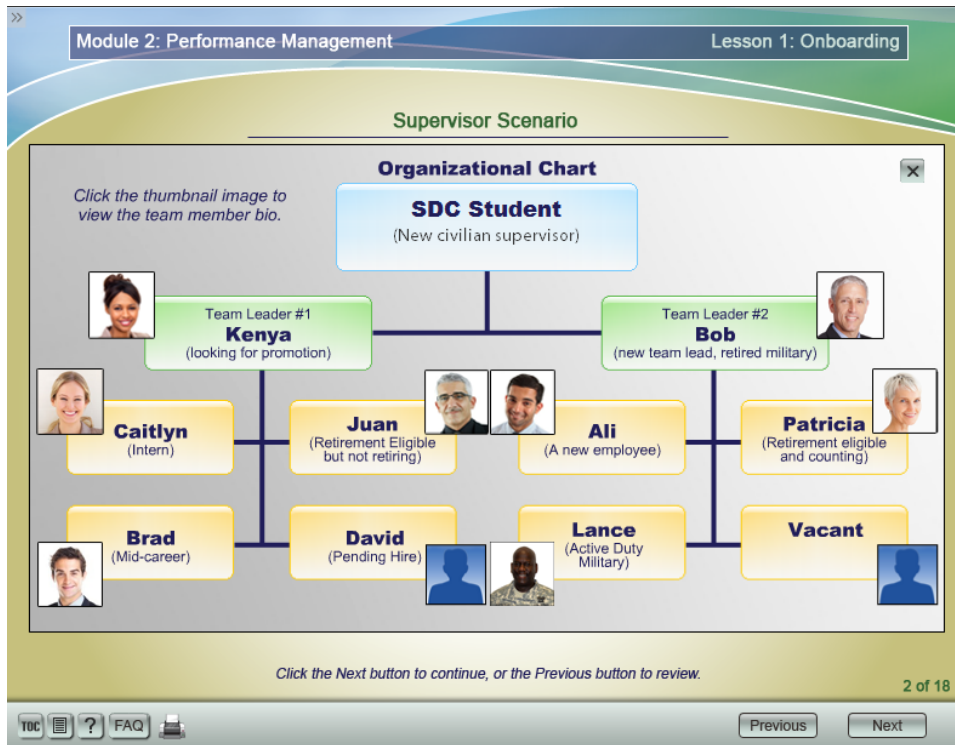
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Lesson 1: Onboarding

Supervisor Scenario



**KENYA-Team Leader #1**

*Kenya is one of the two team leaders and supervises 3 people. She is a 30 year old female who is neither married nor has any children. She has been working for the government since she was 17 as a student hire. She has always had excellent annual appraisals. She has her Master's Degree and is currently working on her PhD in Leadership. She has been a part of the training division for 5 years, and had applied for the position of the Supervisor you have now been promoted to. Kenya was very disappointed that she wasn't selected for the position and immediately started job hunting. She considers herself a very hard worker, but she is feeling devalued at this time.*

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**BOB-Team Leader #2**

*Bob is six years into his second career as an Army civilian and recently promoted to team leader supervising three other employees. He is pretty psyched about his promotion. He is great on the technical end of things, but he still needs more polish with improving his leadership style. Bob's leadership style could be best described as directive, but he is trying very hard to adopt a more participative and situational approach to leading his subordinates. He is highly motivated, always willing to take on anything. A former Marine, Bob is 44 and, with his lanky build, looks even younger. He is still married to his college sweetheart; they have twin boys and are content. Bob is a dedicated and hard working supervisor who takes his work seriously knowing that his department is making a significant contribution to helping the war fighter.*

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**CAITLYN - Intern**

*Caitlyn is the newest member of the organization with this being her first experience with the Federal Government. She entered the workforce straight out of college through an Army intern program. With a bachelor's in business, Caitlyn lacks the experience required to be a SME in any of the technical areas of the organization but makes up for that with her energy and desire to learn. She is very passionate about using and integrating technology into the processes already established within the organization. Caitlyn is not sure how long she wants to be a federal employee but right now enjoys the possibility of flexible schedules so she can spend more time with friends and family.*

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**JUAN - Retirement Eligible But Not Retiring**

*Juan is the longest tenured employee within the organization. He has been around to see a change in leadership many times and has been an integral part in maintaining stability during those times of change. Juan had submitted his paperwork to retire last year but because of the current economic situation decided to postpone retirement until a later date. Juan has a wealth of knowledge and is very competent at doing his job. However, he prefers to work alone and not participate in team projects.*

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**ALI - New Employee**

Ali has been employed with the federal government and this organization for two weeks. Before this job Ali, worked for one of the big six consulting firms. He decided to leave the private sector after six years to join the public sector for job security based on new developments in his personal life. Ali recently found out he will be a father in six months. Ali has been a quiet observer since his arrival trying to determine the culture and climate of the organization.

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**PATRICIA - Pending Retirement**

Patricia is a 65 year old woman who enjoys work and tends to be very motherly towards the rest of the team. She is very religious. She is an expectant grandmother and is looking forward to retiring and taking care of the new baby. Pat is the budget analyst and has been with the organization for the last 11 years. She knows the 'ins and outs' of her job and is the expert on the new budget management system database. She wonders who will be her replacement because she would like to start training that person before she retires within the next 4 months.

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Supervisor Scenario



**BRAD - Mid-Career**

Brad has been employed with the federal government for fifteen years two of which have been with his current organization in the same position. During his tenure, he has been employed by three different government agencies. Brad is a dedicated worker who is well respected and liked by both management and fellow employees. On at least two separate occasions, he has applied for management positions that were ultimately given to other employees with less experience and education. Brad is eager to seek out different job opportunities; therefore, he has recently enrolled in a night school Master's program at a local university. It is no secret that Brad belongs to the "Big Four," a group of employees that eat lunch together every day and gossip about the organization.

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**LANCE - Active Duty Military Member**

Lance is a career non-commissioned officer (NCO) recently assigned to the department. Lance was born in Hamilton, OH and was raised in Wilkes-Barre, PA. He enlisted in the Army in 1997 and throughout the course of his career, has had three combat tours and leadership experience at the platoon level. Before coming to the organization, he served as an Instructor for Initial Entry Training and later as a Course Chief. Lance's awards and decorations include the Defense Meritorious Service Medal, Meritorious Service Medal, Joint Service Commendation Medal, Army Commendation Medal (8th Award), and Army Achievement Medal (4th Award) among others. His wife gave birth to a daughter over a year ago who has some significant special needs and he was assigned to your organization as part of a compassionate reassignment. He has an Associate's Degree in business and is currently working on his B.S. degree through off-duty education on post. Lance has a strong work

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**Supervisor Scenario**


The following are three possible responses that Bob could give:



"No problem, I will be glad to make sure that he has successfully completed his orientation checklist and it has been forwarded back to human resources and he needs no other assistance."

"I would be glad to speak with him regarding the culture and climate of the organization, clarify work conditions, etc..."

"I will follow up with Ali in your absence regarding his initial transition; however, when you return you still will need to speak with him about specifics such as your leadership style, your expectations, etc..."

 Put yourself in Bob's place as the Acting Supervisor, and select the best option. Later we will consider all three options and why each may or may not be the best choice. For now, let's look at the lesson content.

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**Onboarding:**  
*You never get a second chance  
to make a first impression.*

**What is Onboarding?**  
We will begin with first defining the term onboarding.



*Take a few minutes and write down how you would  
define the term onboarding.*

Continue with the lesson content to see how close you  
are to an accurate definition of onboarding.

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Onboarding refers to the process of integrating new employees into the organization, of preparing them to succeed at their job, and to become fully engaged, productive members of the organization.

### Onboarding Defined

Onboarding refers to the process of integrating new employees into the organization, of preparing them to succeed at their job, and to become fully engaged, productive members of the organization.

It is important for a supervisor to understand the concept of onboarding. Onboarding focuses on the following:

1. A strong employer welcome
2. Affirmation of the employee's right choice in a job
3. Affirmation that the employee fits into the organization
4. Long-term relationship building

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### The Onboarding Experience

Think back:

To your most successful onboarding experience – what made it successful?

To your most unsuccessful onboarding experience – what made it unsuccessful?

As a supervisor, what changes could be made to turn the unsuccessful experience into a successful experience?

According to the Aberdeen Group, a business research organization, 90% of employees make their decision to stay at an organization within the first six months. It is critical for organizations to make a

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### Successfully Onboarding

As a supervisor, do you....

- Believe that you onboard new employees?
- Believe that your onboarding is fully aligned with organization goals and objectives?
- See opportunities for improvement?



*Take a minute to write down an example of how new employees are onboarded in your organization. Let's see how your example compares to the process of onboarding discussed later in the lesson.*

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Key onboarding activities, such as clearly communicating performance expectations, providing feedback, involving co-workers and peers, and providing training are integral to boosting performance.

Booz Allen Hamilton conducted a study of federal agencies and federal leaders in 2008 regarding onboarding new employees. The results of their study was presented in a study entitled "Getting on Board: A Model for the Integrating and Engaging New Employees." The study concluded effective onboarding programs can improve employee retention by 25%. Proper onboarding can reduce the high cost of turnover. When a new employee quits, it may take months to recruit and train a replacement. This creates productivity losses, and other employees may grow demoralized. When employees are properly onboarded into an organization, they feel a part of the team and understand where they fit into the organization.

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Lesson 1: Onboarding

### Why is Onboarding Important?

- Increased Retention
- Increase Morale
- Increase Productivity
- Bonding Time with Management
- Bonding Time with Organization

Click the image to the right to see a case study about the importance of onboarding.

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Module 2: Performance Management Lesson 1: Onboarding

### Orientation Vs. Onboarding

TYPICAL ORIENTATION	ONBOARDING
Transactional focus and goals	Strategic focus and goals
Less than one week	Includes first year
Owned and executed by human resource office	Integrates multiple offices, functions and individuals
Addresses some new employee needs	Addresses all new employee needs – from information, equipment and accounts to training and networking
Employee attends	Employee is active participant with vested interest in success
Yields new hires with completed paperwork and some general information	Yields successful first year for new employees – maximizes employee engagement and retention

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### Top Challenges for Onboarding

As a supervisor, it is important to recognize there will be challenges to the onboarding process. The top five challenges to onboarding are:

- Lack of robust process
- Not made a priority
- Viewed as only a checklist
- Failure to define the experience
- Unclear ownership of process

*Mouse over the bullet points for more info.*

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Lack of a robust process – to remedy this challenge a supervisor can create an onboarding roadmap. Onboarding principles ensure the onboarding process is comprehensive, integrated and reflective of the organization's needs.

Not made a priority – to remedy this challenge a supervisor should ingrate onboarding with the hiring management process.

Viewed as only a checklist – to remedy this challenge a supervisor should ensure and check to verify that employees have a positive experience after joining the organization. The goal here is to acclimate and engage employees.

Failure to define the experience - to remedy this challenge a supervisor should emphasize strategic long term workforce planning. This process would require more than the typical one day or one week orientation process. The experience should extend to the first six months.

Unclear ownership of the process - to remedy this challenge a supervisor should automate the tasks of the onboarding process. Identifying and assigning roles and responsibilities for onboarding. Each role in the process depends on the other to ensure a successful onboarding process.

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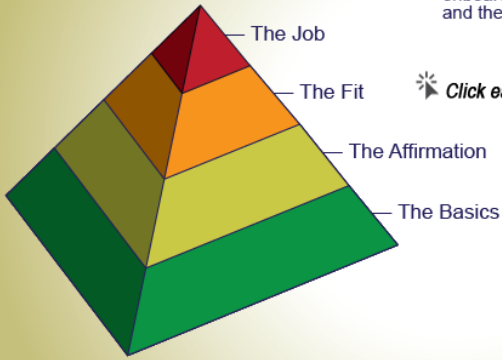
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Lesson 1: Onboarding

### The Four Levels of Onboarding

It is important for the supervisor to start the onboarding process from Day 1, building strong working relationships with their employees. There are four levels of the onboarding process – the Basics, the Affirmation, the Fit, and the Job.

☛ Click each pyramid level title for more information.



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**Welcome new employees upon arrival.** Do not leave your new employee in the waiting room on their first day. A supervisor or co-worker should be available to greet the new hire as soon as he or she arrives. First impressions can often determine the tone of relationships, so make sure that you're attentive and friendly.

**Have their workstation ready.** Arriving at the office to a fully functional computer, phone system and work area is definitely meaningful to new employees. Have an IT representative walk them through passwords and other technology setup procedures. Be sure that new employees are comfortable, and address any concerns that they might have about the new space.

**Teach the employee the basics.** Think about what you would want to know on your first day on a job. Don't make your new employee ask all the questions and end up feeling like a nuisance. Start with the work environment: Point out the bathroom, the kitchen, the printer and the supply closet — anything that will be important for the employee to know on the first day. Make sure the new employee has a full email directory and organization phone list. Provide an overview of the organization chart and explain the purpose of the organization. Discuss work hours with supervisor, and learn the ropes of the where to park in the parking lot.

**Check in at the end of the day.** Stop by your new employees' workspaces at the end of each of their first few days to find out how things are going. Make sure to answer any questions, and express your pleasure at having the new hires join the organization.

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Click each pyramid level title for more information.

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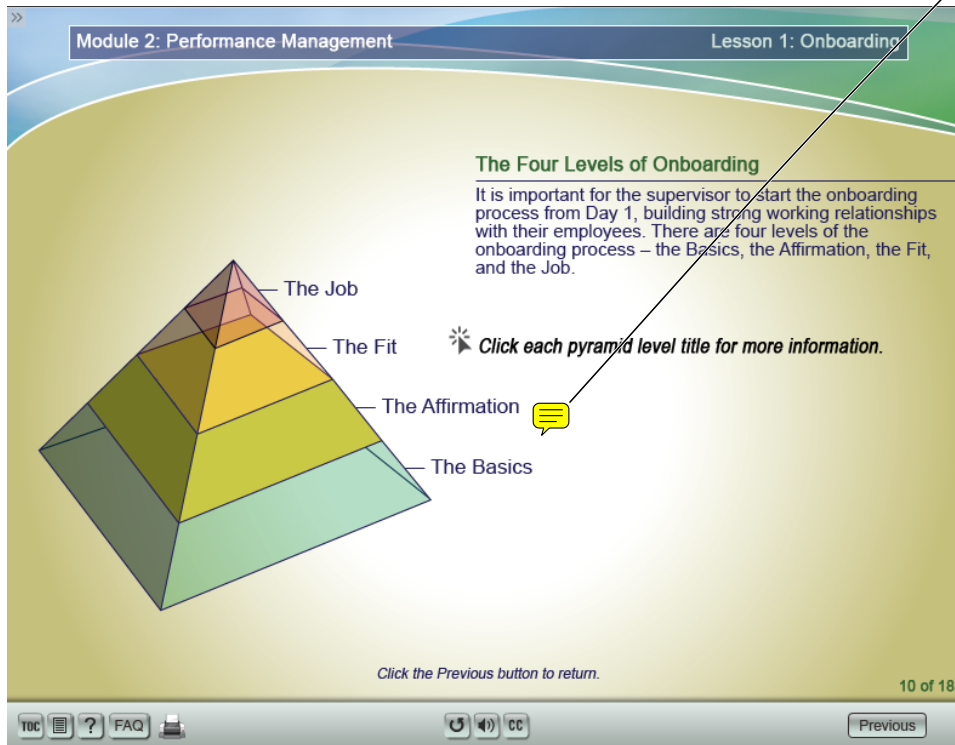
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Level 2, the Affirmation, is where the supervisor sets the groundwork for employee engagement to affirm that the new hire made the right choice in accepting the job.

**Introduce new employees to others at the company.** Try to introduce new employees to members of their team and other important people in the organization. Also, send an email that announces new workers' arrivals and describes some of their past experience so that veteran employees are aware of their skills and background.

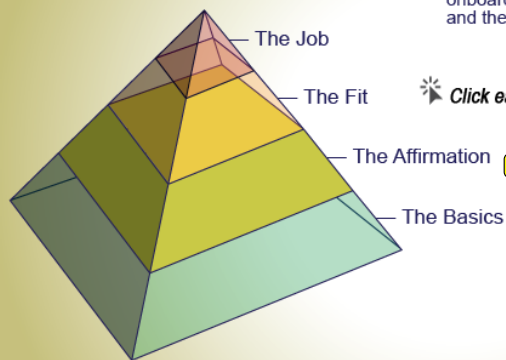
**Assign work buddies.** Work buddies can help new employees comfortably transition to their new professional environment. The buddy should work in the same field and be able to answer questions, explain policies and offer encouragement for the first month of a new hire's employment.

**Give them a tour of the building.** New employees should be comfortable navigating the workplace. Make sure that they are familiar with important locations in the building, including bathrooms, the kitchen, and additional entrances and exits. It's preferable to share the unspoken aspects of organization's culture to ensure that all new employees understand their work environments. Don't make the mistake of assuming that cultural nuances are obvious or that new employees will raise questions if they're unsure about what to wear or when to arrive at work.



### The Four Levels of Onboarding

It is important for the supervisor to start the onboarding process from Day 1, building strong working relationships with their employees. There are four levels of the onboarding process – the Basics, the Affirmation, the Fit, and the Job.



☛ Click each pyramid level title for more information.

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### The Four Levels of Onboarding

It is important for the supervisor to start the onboarding process from Day 1, building strong working relationships with their employees. There are four levels of the onboarding process – the Basics, the Affirmation, the Fit, and the Job.

Click each pyramid level title for more information.

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Level 3, the Fit, is affirmation for the long haul. It is during this level that new hires learn the mission and values of the organization. Creating alignment between organization mission and the role of every employee is a basic leadership challenge. Every employee should understand how his or her role supports the organization's mission. This is longer-term affirmation, where the organization, led by the supervisor, models the culture to which the organization aspires. Additionally, new hires learn work conditions and job specifics are described.

Give new employees something to do. It's hard to jump right in when you're new, but it's even worse feeling as though you aren't needed. Make sure that new employees have a training manual to read and small, simple tasks to complete during their first few days. They will feel valued and useful but not overwhelmed.

And then focus on the work. Go over the employee's role in the company, but stick to the basics; you don't want your employee to feel overwhelmed. The worker is a smart person — that's why you hired him or her. The employee will learn the details later on. Today's goal is just making him or her feel like they are part of the organization.



Level 4, the Job, is where organizations have the opportunity to differentiate themselves from other organizations.

Supervisors and employee are actively engaged in this level. Supervisors should provide meaningful work for new employees, ensure the assignment is understood, and provide timely and constructive feedback on completed assignments.

Supervisors start building a foundation for a trusting relationship with the employee. Build trust, by being consistent, reliable, present and empathetic. Be truthful and open with information, and generous in giving credit where it is due. Be collaborative, using win-win techniques to resolve conflict. Earn trust by trusting others.

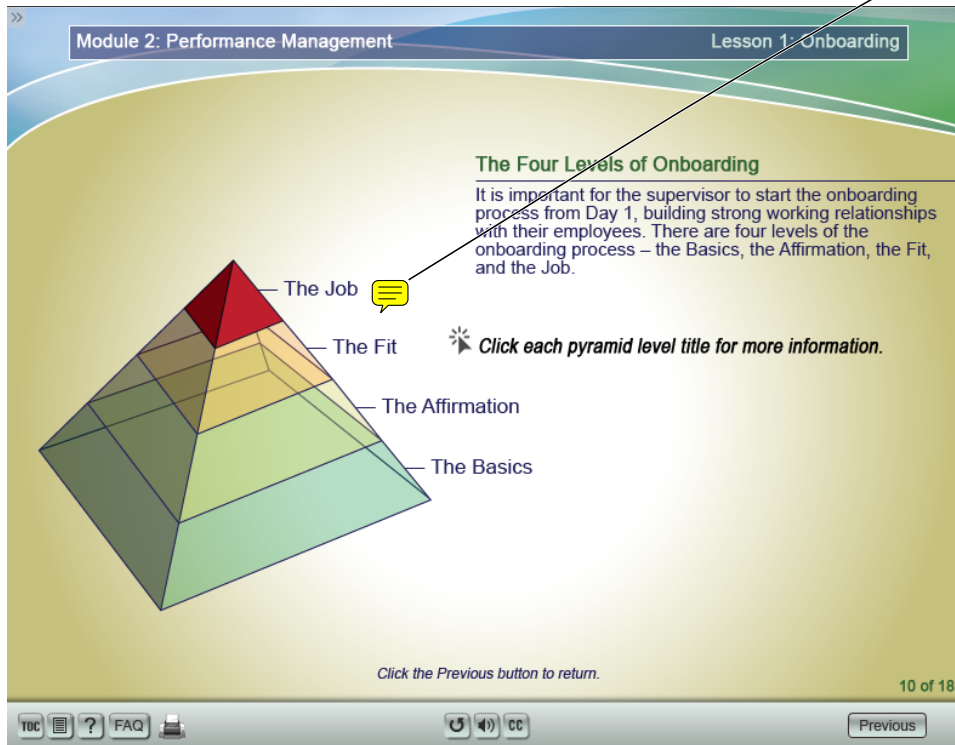
Supervisors work to help their employees shorten their learning curve. The learning curve can be divided into four areas:

Culturally- by describing the unwritten rules and expectations

Organizationally- by walking through key processes and introduce the employee to key leadership.

Personally- by helping the new employee learn from mistakes and provide ongoing feedback.

Relationally- by discussing how decisions are made, information is shared and disagreements are handled.




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### The Onboarding Process




Before First Day First Day/Orientation First Week First 90 Days First Year

- Extend personal welcome to employee
- Communicate first day logistics to employee
- Send paperwork in advance and / or online portal access
- Prepare for employee (checklists, inform team,...)

 Click each tab above for more information.

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### The Onboarding Process

Before First Day First Day/Orientation First Week First 90 Days First Year

- Focus on sharing the mission vision and values
- Incorporate executive leadership
- Orient employee to organization and office norms
- Introduce employee mentor
- Meet immediate requirements for employment

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### The Onboarding Process



Before First Day First Day/Orientation **First Week** First 90 Days First Year

- Ensure direct managerial development
- Set performance expectations and job scope
- Assign meaningful work
- Communicate resources or networks required for work

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### The Onboarding Process


Before First Day First Day/Orientation First Week First 90 Days First Year

- Provide essential training
- Monitor performance and provide feedback
- Obtain feedback through new hire survey / cabinet surveys and other means
- Create employee development plan

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### The Onboarding Process




Before First Day First Day/Orientation First Week First 90 Days **First Year**

- Recognize positive employee contributions
- Provide formal and informal feedback on performance
- Reinforce employee development plan

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Module 2: Performance Management

Lesson 1: Onboarding

Employee



Supervisor

Organization

Three Groups Must Be Involved!

For onboarding to be successful, there are three elements that must take an active role in the process - the employee, the supervisor and the organization. Let's explore the role of the employee, the supervisor, and the organization in this process.

 *Click within each circle for more information.*

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**SDC Student,  
the Supervisor**

### The Supervisor

- Drives the process
- Builds the relationship
- Focuses on dialogue
- Shares priorities and expectations early in the process

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### The Employee

- Takes responsibility
- Seeks clarity
- Takes action

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### The Organization

- Onboard Overview – how is it defined? What does it look like? How does it work?
- Identify Responsibilities
- Encourage ongoing dialogue at all levels

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### Supervisor-Employee Relationship

- How are we going to work together?
- My style, your style
- Both seeking a flawless start-up
- What do we really expect from each other?

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**Onboarding for More Than New Hires**

Onboarding is not just for new hires. When employees are reassigned, transferred, promoted or rehired, the integrating process starts all over. The employee has a new role to play within the organization.

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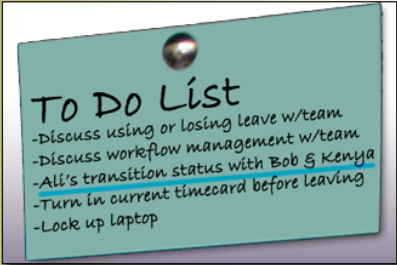
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**TO DO List**

- Discuss using or losing leave w/team
- Discuss workflow management w/team
- Ali's transition status with Bob & Kenya
- Turn in current timecard before leaving
- Lock up laptop

### Supervisor Scenario Revisited

Now that you have a better understanding of onboarding, let's revisit the earlier scenario where Bob was asked to follow-up on Ali's transition.

Look at your notes. Which response from Bob did you select as the best choice?

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Leadership Application

**NOT A GOOD CHOICE:** The onboarding process does not end after the employee receives the overview of the organization, the employee handbook, and completes necessary payroll and benefits paperwork, it is a continuous process that can last up to a year.

**NOT THE BEST CHOICE:** As the supervisor, it is your responsibility to be actively engaged with the employee, establish a trusting relationship, and communicate job responsibilities. This dialogue should not be just a onetime occurrence, but should take place throughout the transition period.

**THE BEST CHOICE:** As the supervisor, it is important for you to articulate your leadership style, outline your expectations of the employee, and for the employee to articulate their expectations of the supervisor.

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### Additional Considerations to Research


What are the consequences for the organization and employee if onboarding is not addressed or short-changed?


How does your organization bring new people in?

Whose responsibility is it to ensure a smooth transition?

How do you tailor onboarding?

What are the consequences of not having a formal onboarding process?

 [Click here](#) to open a PDF file of this list. You can then print it and add it to your Supervisor Development Folder.



*Remember you can always click the FAQ button to help you find answers.*

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### Lesson Takeaways

As a supervisor, make sure that:

- You are able to define the concept of onboarding
- You can list and explain the four levels of onboarding
- You can discuss the respective roles of the employee, supervisor and organization in the onboarding process



 *Click image for Supervisor Reflections*

Do you have a thorough understanding of the Lesson Takeaways? Do you still need to do some reading about the Additional Considerations listed on the previous screen? If you feel confident about your knowledge of Onboarding, proceed to the next lesson. If not, use the flyout menu to review, or use the Reference tool or FAQ tool to gain more knowledge.

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### Reflections for a Supervisor

As a supervisor, you should ask yourself...

- How much time will onboarding take?
- Is it worth the investment?
- How does onboarding relate to employee productivity, performance management, and team building?

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Module 2: Performance Management

Lesson 1: Onboarding



CERTIFICATE OF  
**Completion**  
THIS AWARD IS GIVEN TO  
**You**  
IN RECOGNITION OF SKILLS GAINED BY  
PARTICIPATION IN THE AWARD MANAGEMENT  
STAFF COLLEGE'S R.D.C. LESSON

### Lesson Complete!

**Congratulations, SDC Student.**

You have completed the Onboarding lesson. Remember, you can always come back to this lesson to review.

By clicking the Next button, you will be given the opportunity to provide us with feedback on the lesson you have just completed. Your input is important to us, and will help us keep our content and playability at the highest level possible.



*Congratulations!*

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