



Name:

Start Date:

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Policy

Organizations need to be committed to ensuring all employees receive a successful orientation. It is essential that employees feel valued and are familiar with the organizational structure, co-worker's roles as well as their own role and responsibilities. It's important to ensure a successful transition into the position, as well as set the stage for building the team and creating a positive experience for the new employee through the Onboarding process.

Benefits include lower turnover costs, fewer errors and increased productivity in a shorter time frame. There will be on going meetings through-out the process. If the new employee is facing any challenges, additional support and training may be provided.

This Orientation Guide will provide the necessary tools and resources, and consistency of approach to help prepare for the employee's first weeks throughout the entire Orientation process.



Scope

This guide applies to all employees who are new or returning to the organization.

Goals of Orientation

- Ensure the new employee feels welcome
- Demonstrate that each employee who joins the organization is valued
- Define and explain roles, and responsibilities for the new position as well as co-worker positions
- Ensure the employee understands the values of the organization and the direction the organization is headed
- Build positive connections between the employee, co-workers, and management
- Make workplace resources readily available
- Exhibit a commitment to a diverse and inclusive workplace
- Provide the necessary ongoing support for a successful transition

Role of Management

- Responsible for overseeing the orientation process
- Review Organizational structure
- Assess any skills gaps that need to be addressed for the new employee to be able to successfully do their job
- Provide the necessary training to address skills gaps
- Provide the tools necessary to do successfully do the job
- Be a mentor
- Provide a “Buddy” who will help the new hire adapt to their new role
- Come prepared with any questions about the job
- Come prepared to start work that day
- Connect with the Buddy that has been assigned and ask any additional questions that may come up about the job or organization
- Follow the direction of Management
- Utilize the tools provided to successfully complete the job

Role of Employee

- Come prepared with any questions about the job
- Come prepared to start work that day
- Connect with the Buddy that has been assigned and ask any additional questions that may come up about the job or organization
- Follow the direction of Management
- Utilize the tools provided to successfully complete the job



Before the First Day

Before the first day of work complete the following tasks.

For Employee

• Draft offer letter and obtain signature	Yes	No
• Introduce your role in the orientation process and assign a “buddy”	Yes	No
• Advise new employee of what to expect the first day (what to bring, parking, whether to bring a lunch, are there lunch room facilities)	Yes	No
• Advise of information required for payroll	Yes	No
• Advise to bring driver’s license and insurance (if applicable)	Yes	No
• Advise of basic expectations (dress, parking, hours, location)	Yes	No
• Arrange to have lunch on the first day. Put welcome bag together.	Yes	No

Preparation, if Applicable

• Order technical accessories, if applicable	Yes	No
• Order Key or security card	Yes	No
• Arrange a tour of the organization	Yes	No
• Set up Health and Safety Training	Yes	No
• Set up any other pertinent Training	Yes	No
• Order any other accessories that may be necessary	Yes	No
• Add employee to organization chart or add their information into your employee tracking system	Yes	No
• Set up meetings with critical people (Financial, Manager for Introduction meeting)	Yes	No
• Ensure work station is set up	Yes	No
• Have all the necessary forms ready for review (Code of Conduct, Confidentiality, Attendance etc...)	Yes	No
• Arrange a lunch with buddy and new employee	Yes	No
• Prepare employee’s calendar for the first 3-4 weeks	Yes	No



First Week Action Items

This list should be built into the training plan. Actionable items will be created based on industry and internal practices. Here are some examples:

- Welcome new employee give gift and show them their workspace
- Review the first week schedule of events with the new employee so they know what to expect
- Review organizations mission, vision, values, organizational structure etc....
- Review company manual. Review work hours, flexible work, overtime, vacation, sick time proper attire and any other internal policies, emergency procedures etc...
- Review Job description, duties and expectations. Provide details of how the job fits into the larger organization
- Once initial meeting is done introduce employee to coworkers and their “buddy”
- Give tour of organization

End of 1-3 Months

At the end of 1-3 months- schedule a meeting with the employee and manager to discuss the following:

- How the employee is doing and if there are any areas of the Onboarding process that did not work well and what did work well
- If they feel have had a chance to meet all their team members and integrate
- Have open discussion of any questions the employee may have, how they have transitioned into the position and if there are areas they may need additional support
- If the probationary period is three months and has been successfully completed talk about performance goals and set objectives for the next year

End of 6 Months

At the end of 6-months schedule a meeting with the employee and manager to discuss the following:

- Employee’s overall impressions. Find out how the employee perceives the organization. If there are any challenges or concern, address them
- If the probationary period is six months and has been successfully completed talk about performance goals and set objectives for the next year



End of 1st Year

The Onboarding process is complete at the end of the first year from date of employment. The Manager should schedule a meeting with the employee to discuss the following:

- How the employee has been doing since the last meeting. If there were any challenges have they overcome the challenges.
- Conduct a Performance check in or full review depending if you offer regular coaching or once a year review:
 - Review performance and ensure you cover what has been going well, what has not been going well, a plan for improvement and set further goals and objectives.

Best Tips for Onboarding Practices

1. Assign a buddy. This is the go to person to have questions answered and help the new employee assimilate quicker.
2. It's nice to provide a small welcome gift. Something with the company logo on it is nice.
3. Ensure you communicate the company's culture and vision.
4. Always have clear open communication.
5. Outline job responsibilities. New hires want to know exactly what their responsibilities are.
6. Provide effective on the job training.
7. Give early feedback on how they are doing on the job. End of the first day, a few days later and then moving forward the end of each week while on probation.
8. Set expectations and goals early on.
9. Have a plan and use a checklist to ensure nothing gets missed.
10. Introduce the new employee to the team.
11. Ask them for feedback on how the onboarding is working for them and what they need.
12. Don't overwhelm your new employee on the first few days. Schedule some breaks and don't cover too much information in one sitting.

Onboarding Guide



Calendar

Employee Name:				
Day/Date	Time	Action Items	Name	Role
1.				
2.				
3.				
4.				
5.				

Onboarding Guide



Employee Name:

Day/Date	Time	Action Items	Name	Role
6.				
7.				
8.				
9.				
10.				

Onboarding Guide



Employee Name:

Day/Date	Time	Action Items	Name	Role
11.				
12.				
13.				
14.				
15.				



Onboarding Guide



Employee Name:

Day/Date	Time	Action Items	Name	Role
16.				
17.				
18.				
19.				
20.				