



Onboarding Toolkit

Everything you'll need to
onboard your new hire

Strengthening Jewish Cincinnati



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What is Onboarding?

Orientation vs Onboarding vs Integration

- **Orientation** will occur on the first day or during the first week, to introduce new hires to policies and procedures.
- **Onboarding** is the process that socializes new employees to ensure they have the necessary skills and knowledge to become effective team members. These are the things we do to bring a person safely on board.
- **Integration**, especially for those in leadership and key positions, is a collection of activities that help the new staff member to navigate the internal/external networks and gain insight into organizational and team dynamics.

What will HR do? Orient.

What will the hiring manager do? Onboard and Integrate.

Before they start you will work with HR to coordinate the following:

Communicate the game plan via welcome email (see sample)

- Provide necessary paperwork
- Get them excited
- Provide logistics for new hire's arrival, first day, and first week
- Share the plan with the new hire and their team
- Send out the Welcome email to staff (see sample)



4 Why is Onboarding Important?

69% of employees stay at least three years when they experience great onboarding



37% of companies extend onboarding beyond the first month



18% of the role's annual salary allotment is the cost to replace an employee



25% of employees are lost within the first year due to poor onboarding

When we bring someone into our organization it is our hope to provide a supportive environment, build loyalty, create emotional attachment, and encourage commitment.



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Using this toolkit



This guide will likely need to be customized for your agency, location, department, and job specifications. It may also need to be adjusted to your new hire's skills, capabilities, and knowledge.

It's important to remember that onboarding is the responsibility of the entire organization, not just HR or the hiring manager. The hiring manager is, however, responsible for making sure it happens.

The entire organization is impacted when new employees arrive, so many people need to be involved in onboarding efforts.

This tool kit will guide you through the critical steps and provide you with the information and tools to help you by:

- Setting up a thorough onboarding schedule
- Making a great first impression
- Giving ideas for documents to include in your orientation
- Suggesting steps you can take to give your new employee some small wins right away
- Building strategies for ongoing supervision

We want our staff to:

- Connect emotionally
- Understand company values – what matters here
- Feel welcome
- Understand how they fit in
- Understand their impact on the big picture
- Know they are valued
- Feel productive quickly



Onboarding Roles

Human Resources

- Complete all necessary HR new hire forms (tax forms, I-9, policy acknowledgements, etc)
- Complete JCC membership agreement with employee (if eligible)
- Secure employee's photo for HRIS/Payroll system
- Secure employee's key fob/badge
- Review process to requesting PTO (paid time off)
- Provide instructions for how to reserve a huddle room
- Provide a copy of the agency's handbook and review its key aspects
- Provide instructions on how to use their phone
- Go over parking diagram and review employee parking policy
- Share dates for the two required trainings:
 - **HR New Hire Orientation:** One-hour training given by HR which reviews housekeeping items such as what agencies are on campus, payroll, IT, membership, HR policy, etc. Employees and managers must ensure new hires attend this orientation within two months of hire
 - **Quarterly Emergency Preparedness Training:** All new hires must attend within three months of hire.
- Review all aspects of benefits programs with new hires
- Inform employees that most forms mentioned above are available online
- Give employees a tour of the office space
- Explain where each agency department is located
- Explain what Shared Business Services (SBS) is, and how it impacts them (i.e., payroll, mileage reimbursement, etc.)

Supervisor

- Work with HR to coordinate and provide necessary paperwork
- Communicate welcome emails with staff and new hire (sample below)
- Encourage the new hire to feel excited, welcome, and integrated into the team
- Provide logistics for new hire's arrival, first day, and first week
- Share the plan with the employee and their team
- Your newest team member deserves an onboarding experience that is positive, memorable, and meaningful, so take the time to properly prepare

Now it's up to you

Take the time to make a lasting positive impression on your new team member with a thoughtful and intentional onboarding experience.

Keep in mind that this is a guide. It will require customization to your agency, location, department, job requirements and the skills, abilities and knowledge of your new person.



Don't be afraid to experiment and make this an enjoyable experience for everyone.

8 Employee Welcoming Tools

New employee introduction email example

Dear <New Hire Name>,

We're so excited that you will be joining our team at <Organization>. We know you will be an excellent addition to the <Department> and we're looking forward to your official start on <Date>.

Over the next few days, HR will be in touch with some information and paperwork to make your first day as smooth as possible.

Please send me a headshot/photo of yourself so I can share with the team to help them more easily recognize you when you're here.

If you have any questions/concerns in the meantime, don't hesitate to reach out! I'm looking forward to seeing you soon.

<Your Name>

Internal welcome email example

Dear Team,

We have a fantastic new team member joining us on <Date>. <New Hire's Full Name> will be working in <Department> and will report to <Supervisor's Name>. Everyone who was involved in the hiring process is confident <New Hire's First Name> will be a great fit, and we are eager for them to get started.

<insert photo of new hire>

The team will be taking <New Hire's First Name> to lunch on Monday and everyone else should feel free to drop by to say hello or join us for a meet-and-greet meeting on <Day and Time>.

Let's give <New Hire's First Name> a warm welcome! Their success is our success. Get excited to greet them on Monday!

<Your Name>

Helpful Checklists

Physical Space

Think about what new hires need at their desks, but first consider adding something special. A desk plant? A box of candy? A mug with our logo?

- Desk and chair – clean and make sure everything is in working order
- Computer or laptop (submit request to IT)
- Phone and extension list / staff directory / phone threat sheet, voicemail setup
- Calling out and long-distance codes
- How to transfer call and set up conference call
- Keys for building, office, and/or filing cabinet
- Name badge and holder, business cards (order first week)
- Office supplies (e.g., pens, paper, stapler, etc.) – enough for day 1
- Onboarding packet, handbooks, directories and important materials
- Swag (e.g., water bottle, t-shirt, pen, journal, etc.)

Bonus Points

- *Set a budget and let them order other office supplies they may want / need*
- *Put a gift certificate to a local restaurant or coffee shop in their top drawer*
- *Assign a buddy/colleague*
- *Chat a bit about email/office etiquette*

Virtual Space

- Email– Setting up email signature.
- Caution: Do not overwhelm their inbox
- Access to network/logging in
- Access to any shared (on the cloud) folders, documents, etc.
- Access to printers, copier codes, faxes, scanners, etc.
- Help with adding Outlook, Teams, or Zoom and Password
- Manger app to phone for company business (if they wish)
- How to request HELP
- Make sure they are added to all appropriate distribution lists
- Make sure they are given access to any relevant accounts (Payroll system)



Best boss ever: Checklist

Set up for success

- Review job role and responsibilities
- Discuss manager style & expectations
- Review performance goals
- Schedule meetings with the key “players” working with the new hire
- Overview of common programs & useful websites
- Explain conference room reservations
- Provide employee directory
- Explain desk setup and how the hire can request needed items
- Schedule regular 1:1s
- Add new hire to regular team meetings
- Confirm that employee has received and reviewed policies and procedures
- Review holiday lists provided by HR

Map the lay of the land

- Break rooms; refrigerators, microwaves, and Kosher options
- Bathrooms
- Conference rooms
- Photocopiers
- Supplies and purchasing policies
- Parking
- First aid kit & emergency supplies

Create a warm welcome

- Prepare a week one agenda
- Make lunch plans for their first day
- Have team sign a welcome card
- Give employee company schwag: tshirts, notebooks, thermos, mug, etc.
- Send welcome email to staff
- Introduce employee to co-workers
- Introduce to department leads and executive teams
- Take a walking meeting outside the office to learn more about the employee’s life outside of work
- Suggest a welcome get together in a meeting room with an planned ice-breaker

Show investment

- Identify the training and development activities new hire needs in the next 6 months
- Sign up for classes
- Suggest influencers to follow
- Identify and access immediate development opportunities
- Identify and set measurable career goals

Help ensure integration

- Help develop an “Elevator Speech”– Who I am, why I’m here, and my role
- Make list of stakeholders to meet both internal and external
- Prioritize that list
- Explain how to best approach stakeholders
- Ask yourself and your team– what is most important for new hires to know about our organizational culture and politics? Then share this with your new hire not just once, but regularly provide overview of each department role and how they interact.

11 Elements of a successful first day

These might not happen on day one, but try to fit them into the first week.

1. Greet new hires at the door
A friendly face at the door will put them at ease.
2. Go over schedule for the day
Take them to a comfortable space to look over their schedule for the day and answer any questions they may have.
3. Introduce new hires to their buddies
If your new hire has been assigned a buddy, introduce them and give them an opportunity to spend some time together. Consider having the buddy give the new hire a tour. If you have a mentorship program, the mentor can take the place of a buddy.
4. Give them a tour
Show them around, point out the functional areas in the space, show them the office layout, and introduce them to people as you walk around. This is a good time to let them know about any security procedures and protocols, where to find the bathrooms, lunchtime hangouts, and coffee, etc.
5. Show them their space
Take them to their workspace, show them the setup, provide them the log-ins, and give them some time to settle in. Allow new hires time to complete their paperwork as they familiarize themselves with their workspace.
6. Ensure welcome from senior leadership
Have senior leaders welcome the new hires. Even if it is only a brief meeting, this can make a very positive impression on new employees.
7. Give them an overview of the organization
Go over the mission, vision, and values of the organization. Explain how the organization is structured, what each department does, and how they interact. Give them an idea of how their roles fit into their departments and the organization.
8. Take them out to lunch
Have one person or a small group take them out to lunch. At lunch, the group can share what they wish they knew on their first day, and the best parts of working there, as well as provide information about the neighborhood (where to eat, closest pharmacy, etc.) into their departments and the organization.
9. Schedule a meeting with human resources

Discuss work hours, overtime, use of paid time off, and the benefits package. Also, go over all policies and procedures related to safety at work, including harassment prevention. Specifically, those coming into jobs that are at a higher risk for harassment (e.g., development roles, leadership roles, manager roles, etc.) should be briefed on the organization's written policies and procedures for reporting and addressing any potential issues. Remind all new hires of when they are scheduled to participate in harassment prevention training.

10. Arrange a check-in

At the end of the day, schedule a check-in with each new hire's direct supervisor. Use this meeting to go over the schedule for the first week, discuss working relationships, and debrief the first day. This is a good time to solicit feedback from new employees about their experiences that day so that supervisors can make sure to meet their needs moving forward.

Sample First Day Schedule

9:00 am	Arrival
9:35 am	Review the day's schedule
9:50 am	Meet buddy and take tour
10:35 am	Set up workspace
10:45 am	Organization overview
12:00 pm	Lunch
1:00 pm	Meet HR and finish paperwork
2:00 pm	Department head meet-and-greet
3:00 pm	Set up workspace and computer
4:00 pm	Supervisor check-in
5:00 pm	Departure



The First Week and Beyond

You should schedule most of the first week for your new hires. Provide them with enough structure to help them adjust to their new work environment. Give them the opportunity to get to know the people with whom they will be working, and allow them time to ease into their own daily routine.

1. Cross-departmental meetings

Convene meetings with all collaborating departments. This will provide an opportunity to make introductions to key players.

2. Meetings with other stakeholders

Consider all stakeholders new hires should be aware. Provide a list of people they should meet, and help in setting—or set—a schedule. If face-to-face meetings are not possible, is there someone who can brief them on these stakeholders?

3. Time for check-ins and regular feedback

Ensure the success of a new hire by making weekly check-ins with a direct supervisor a priority. Regular check-ins build a relationship based on trust and transparency. This is also a way to keep track of the onboarding process and make changes as necessary— a best practice for ongoing development and performance management.

Topics to discuss:

- What can you expect from me?
 - What do I expect from you?
 - What worked well this week?
 - What could have been better?
 - How can I be helpful to you?
- What are the expectations for when you work from home.

4. Short meetings

Coffee or short meetings with co-workers and stakeholders is an effective way for the new hire to get the lay of the land. Think about sending quick introduction emails to facilitate brief meetings with the right people.

5. Time to set expectations

Having clear expectations for the entire onboarding process will help new hires navigate it better. During the first week, work together to set clear expectations for the first 30/60/90 days.

6. Job shadowing

If an option, it is a great way for new hires to get an idea of what their days may look like. It also provides the opportunity to get to know one person on a deeper level. Think about having them shadow someone of a similar seniority level.

7. Meetings with the supervisor

Is it possible to take new hires to a meeting and have them observe? Watching their supervisor in action helps build a relationship based on trust and respect.

8. Time to observe a program/event

If there is a program or an event coming up, consider having new hires attend or give them a small role. Seeing the work of the organization in action will help them feel connected to the mission.

9. Performance reviews

Performance reviews should be discussed at the beginning of the onboarding process to ensure full transparency. Although some surprises are fun, surprises related to performance reviews are not. Be open and upfront about the process, timing, and expectations.

10. Organizational calendar

Are there any projects, meetings, training, or events that are scheduled for the organization? Should new hires attend any of them? Will new hires be helping with any of them? Consider what may be helpful for new hires in their onboarding process.

11. Formal training in workplace safety

To demonstrate the importance of workplace safety, provide formal training around harassment policies and safety at work.

12. Something fun and energizing

Get creative! Everyone wants to love what they do, so help new hires feel energized and happy to work for your organization. Consider giving them the opportunity to experience the fun side of your work culture.



Sample week one schedule:

Time	Tuesday
9:00 am	Arrival, settle in
10:00 am	Meet with supervisor (portfolio, responsibilities, supervision, performance reviews)
12:00 pm	Lunch with Coworkers
1:00 pm	At desk review progress thus far (re: project/program/event)
3:00 pm	Team bonding / Icebreaker meeting
Time	Wednesday
9:00 am	Arrival, settle in
10:00 am	Coffee with coworkers
10:30 am	Meeting with Marketing Team
12:00 pm	Lunch
1:00 pm	Meet with HR and finish paperwork
2:00 pm	Department head meet-and-greet
3:00 pm	Set up workspace
4:00 pm	Check in with Supervisor
Time	Thursday
9:00 am	Arrival, settle in
10:00 am	At desk work on project/program/event
12:00 pm	Lunch
1:00 pm	Off-site meeting with organization partners and supervisor
3:00 pm	Debrief back at office and prep for evening event
4:00 pm	Leave for event (venue) to observe
Time	Friday
9:00 am	Arrival, settle in
9:30 am	Meeting with supervisor to set up 30/60/90 day goals
12:00 pm	Lunch
1:00 pm	Open

Set goals for the first 90 days

Below are suggested prompts to set goals with your new hire.

Goal #1

What do you want to achieve?

What does success look like?

What support, training, or resources do you need from me?

By when do you want to achieve that? (mm/dd)

Review what was achieved:

Goal #2

What do you want to achieve?

What does success look like?

What support, training, or resources do you need from me?

By when do you want to achieve that? (mm/dd)

Review what was achieved:

SAMPLE Onboarding Evaluation

For each of the following statements, answer on the scale of:

Strongly Agree (SA), Agree (A), Neutral (N), Disagree (D), Strongly Disagree (SD)

SA	A	N	D	SD	
☐	☐	☐	☐	☐	I felt eager to begin work
☐	☐	☐	☐	☐	I felt welcomed in the organization
☐	☐	☐	☐	☐	I work in a friendly and supportive environment
☐	☐	☐	☐	☐	I feel engaged and productive in my work
☐	☐	☐	☐	☐	I received essential information about my team and organization's culture, mission, vision, and values
☐	☐	☐	☐	☐	I received information in a timely manner
☐	☐	☐	☐	☐	I know what is expected of me by my supervisor
☐	☐	☐	☐	☐	I know what is expected of me by my coworkers
☐	☐	☐	☐	☐	I understand my job responsibilities
☐	☐	☐	☐	☐	I understand the purpose of my job
☐	☐	☐	☐	☐	I understand how my job fits into the mission of the organization
☐	☐	☐	☐	☐	I have the essential supplies, equipment, and support to do my job, or know where to find them
☐	☐	☐	☐	☐	I understand the organization's policies and procedures concerning performance evaluations
☐	☐	☐	☐	☐	I understand the organization's policies concerning misconduct and grievances
☐	☐	☐	☐	☐	The activities and information provided were valuable
☐	☐	☐	☐	☐	I had a positive overall onboarding experience

What were the most helpful activities/information covered during onboarding?

What activities or information do you feel were not helpful or not needed?

How can we improve the first 90 days for new hires?

What other comments do you have about your onboarding experience?



Conversations to have after the first 90 days

Training assessment and development needs

Investing in your staff strengthens the talent pipeline within your organization. Have a conversation about the skills your new hires may want to develop in the next six months.

Onboarding debrief

After 90 days, it makes sense to review the onboarding process. Talent management Advisor will provide the onboarding evaluation to help inform your onboarding process planning and structure. Every new hire provides us with the opportunity to improve the onboarding experience for the next new hire.

Job goal assessment

A good way to ensure that new hires are adjusting well to their role is to have recurring conversations about the status of ongoing projects, what has been accomplished, and what may need an adjustment, etc. Consider revisiting the previously established job goals to keep them relevant and flexible.

Safety at work

Continue the discussion with new employees about the importance of feeling safe at work, and reinforce the organization's commitment to creating a workplace that feels safe for everyone. Have there been any instances where they felt uncomfortable and may want to discuss with you? Do they know exactly what to do if an issue arises?



Remember

The key to developing a positive organizational culture is to immediately establish with all new employees that safety is a top priority, and that unacceptable actions and words will be addressed immediately.

Best boss ever: Check-in

Questions to ask your new hire over coffee:

- How's it going? How do you feel in your new job?
- What are you enjoying most about your role?
- Is the job/team/company what you expected?
- Has anything surprised you? If so, what?
- Has training been helpful? What would you add or change?
- Do you have all the tools and resources that you need?
- Do you feel like you have gotten to know your coworkers well?
- Do you feel out of the loop about anything?
- What should we provide to new employees that we have missed?
- What is working/what is not working?
- Is anything about your role, the team or company still unclear?
- How can I be a better manager to you?
- As your manager, what can I do to make your transition easier?

First six months on the job

It is best practice to have a performance discussion prior to the end of the first year. Many of the suggestions below are also appropriate topics to discuss with employees who have been with your organization for longer than a year. Here are some topics to discuss.

- Did you meet your goals? How do you feel about the workload?
- What are appropriate goals for you in the coming year?
- What else do you need to be successful?
- How would you like to challenge yourself on the job in the next year?
- What skills would you like to develop further?
- What do you think you did well this year?
- What could you have done better?
- How can we improve the performance review process?
- What is the hardest part of this job for you? What is your least favorite part of the job? What is your favorite part of the job?