Helping New Employees Succeed

The Manager's Guide for a Successful
Onboarding Process

UNIVERSITY of
HOUSTON
HUMAN RESOURCES

TABLE OF CONTENTS

IMPORTANCE OF ONBOARDING

POWERFUL EMPLOYEE ONBOARDING
STATS YOU NEED TO KNOW

hello

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

20%
of employee turnover happens in the first 45 days.

Employees who go through a structured onboarding program are

58%
more likely to be with the organization after three years.

Organizations with a standard onboarding process experience

50%
greater employee retention.

https://www.sweetprocess.com/employee-onboarding/

A successful and effective onboarding process can improve employee retention and reduce turnover. By providing the new employee support throughout the onboarding process, it will help them adjust and become more productive quicker as well as help them feel like they are an important part of the team.

Studies have shown the importance of a successful onboarding program. The results show greater satisfaction from management as well as greater performance from the employee.

ONBOARDING CHECKLIST

EMPLOYEE DUTIES (BEFORE START DATE)

- ☐ Sign the offer letter
- ☐ Visit the HR Service Center (341 McElhinney)
  - ○ [Bring correct documents for I9 and Direct Deposit](#)
  - ○ Scan fingerprints (if using TCD)

SUPERVISOR/DEPARTMENT DUTIES (BEFORE START DATE)

- ☐ Assure background check and other paper work has been completed.
- ☐ Confirm start date
- ☐ Send welcome email (template)
  - ○ When to report to the department
  - ○ Who to ask for and where to report
  - ○ What to wear and what to bring
- ☐ Expectations for the first day
- ☐ Introduction packet if there is a large delay between offer and start date
- ☐ Regular communication
- ☐ Provide position, department & University information
- ☐ Set up workspace as move-in ready
  - ○ Contact IT for computer and phone set up
  - ○ Contact Access Control for keys
  - ○ Order any uniforms, equipment, or supplies needed
  - ○ Clean and set up office
  - ○ Print off an order sheet
- ☐ Order business cards
- ☐ Create a first week schedule
- ☐ Print off the [New Hire Online Training list](#)
- ☐ Select a "buddy" for the new employee and ensure the "buddy" is comfortable with the responsibility (See pages 6-7)
- ☐ Set calendar invites for important people to meet
- ☐ Complete ePAR (Electronic Personnel Action Request)
- ☐ Register New Hire for New Hire Orientation

"YOU ARE THE POWER" NEW EMPLOYEE CELEBRATION

- ☐ Introduction to UH
- ☐ Overview of UH policies

- ☐ Benefits Information
- ☐ UH ID
- ☐ Parking permit

DAY 1 - MANAGER

- ☐ When possible, escort your new employee from NEC to your office (Or send representative).
- ☐ Send out welcome email to department
- ☐ If the employee is bi-weekly, discuss TRAM procedures
- ☐ Answer any immediate questions the employee may have
- ☐ Tour of department & introductions to co-workers
- ☐ Provide keys, uniform, equipment, etc
- ☐ Give employee time to get acquainted with his/her workspace
    - o Log into computer/phone systems
    - o Set up email, voicemail, etc
- ☐ Introduce to "buddy"
- ☐ Lunch
- ☐ Review first week and training that will occur and by whom
- ☐ Provide schedule
- ☐ Review with employee
    - o Department organizational chart
    - o Describe department goals and mission statement
    - o Explain levels of supervision
    - o Review job description
    - o Explain their role within the department and how it fits into department goals, mission and vision.
    - o Department expectations & policies
- ☐ Provide any department instructions, manuals, guides, desk manuals for employee review
- ☐ Provide New Hire Online Training List (Have employee enroll in required trainings)
- ☐ At end of first day, review the day's activities, discuss next day's activities and answer any pending questions.

FIRST WEEK

- ☐ Have employee complete New Hire Training and any additional required trainings
- ☐ Have employee set up benefits (See Benefit Timeline section) Provide them with a copy of the Benefits timeline.
- ☐ Discuss milestones and projects
- ☐ Review calendar of events
- ☐ Set 30 day priorities
- ☐ Define individual goals and objectives

- ☐ Discuss expectations
- ☐ Clearly define the career path if applicable
- ☐ At end of first week, review the week's activities and gauge how new employee feels about their first week.

FIRST MONTH

- ☐ Informal check-ins with the new employee
- ☐ Review the first month
- ☐ Provide feedback regarding performance
- ☐ Solicit feedback from employee
- ☐ Solicit feedback from peers

90 DAYS

- ☐ Obtain and provide feedback regarding topics such as performance, attendance, skills, and abilities.
- ☐ Solicit feedback from the new employee; it's important to hear his/her thoughts as well regarding challenges as well as positive experiences.
- ☐ Solicit feedback from peers; it is important to hear other coworkers' assessments of the new employee.
- ☐ Determine what additional resources or trainings are necessary for the new employee.

FIRST SIX MONTHS

- ☐ Continue meeting with your team member on a regular basis. The first week for a new employee is often full of meetings, information gathering and tours. However, your new hire will probably still feel "new" for some time, so it's important that you keep a line of communication open with him or her and continue to structure some time for questions, information sessions, and training. Sample questions to ask your new team member at these meetings are provided in the Question section.

DURING THE FIRST SIX MONTHS TO ONE YEAR

- ☐ Regularly meet with new employees to review progress on goals, review performance, and give feedback. Also, ask for feedback about how things are going and if they're getting the support they need from you and others.
- ☐ Ask new hires if there are learning and professional development opportunities that seem interesting to them. Discuss which ones are appropriate, introduce Catalyst training programs (including Lynda.com) and show them how to enroll.
- ☐ Conduct evaluation period/trial period formal review.

☐ Encourage your new team member to get involved with the community. They could do this by talking to colleagues about campus groups, publications and other professional activities and resources that are available.

SUCCESS TIPS FOR MANAGERS

BE SURE TO:

1. Create or assign a work space for your new employee.

2. Insure that the employee's supervisor will be in the office when the employee starts work.

3. Let all team members know when the new person is starting so he/she will be greeted by name and guided to his/her work area.

4. Assign a "buddy" to stay with the new employee; introduce them to the team, show them around the office, etc… starting Day 1.

- Insure the buddy will be in the office during the employee's first few weeks.
- Insure the buddy has a positive attitude and is knowledgeable about the people and procedures in the office.

BUDDY PROGRAM

THE ROLE BUDDIES PLAY

A new employee's orientation is greatly enhanced by setting up a buddy for the employee. A buddy is not a substitute for a supervisor, but is someone who can provide guidance and answer the new employee's questions about the work environment and the workplace culture in a positive and encouraging way. A buddy can relate new employee information to actual situations.

HOW TO STRUCTURE A BUDDY ASSIGNMENT

A buddy should build rapport with the new employee by meeting face-to-face and answering questions by email, phone or instant messenger within a reasonable amount of time. It is encouraged for buddies to meet face-to-face for a minimum of 30 minutes each week for an established time period; however, support can go beyond the defined time period if appropriate and useful. Provide the "Being a Buddy" handout to the assigned buddy (at the end of this section).

WHAT MAKES A SUCCESSFUL BUDDY

To be a buddy, an employee must understand the culture, have good interpersonal skills, and want to help. Below is a list of other qualities to consider when looking for a buddy:
- Can be given the time to be accessible to the employee
- Holds a job similar to that of the new employee (i.e. peer)
- Possesses a full understanding of the work environment (minimum length of service of six months or a year)
- Has a good performance record
- Is well regarded by peers
- Has good communication and interpersonal skills
- Has patience and is empathetic
- Has a positive attitude
- Possesses a strong sense of confidentiality

THE RESPONSIBILITIES OF A BUDDY

A buddy should provide as much concise information as possible to help the new employee feel comfortable in his/her work environment. The buddy should be a resource to the new employee on work rules, workplace culture and norms, and unwritten policies and procedures. Below is a list of other responsibilities of a buddy:
- Helping socialize the new employee with peers, joining them for lunch, etc.
- Identifying resources in the workplace
- Providing a tour of the workplace if the supervisor has not already done so
- Reporting any serious issues/concerns to the manager/supervisor or Human Resources
- Answering questions and referring the new employee to the appropriate resource
- Instilling a sense of belonging

"BEING A BUDDY"
Success Tips for Buddies

Congratulations on being selected as a "Buddy" for [new employee's name] who is joining us on [start date] as a [job title]. As a Buddy, you are a key player in our onboarding program, helping the new employees to become better acquainted with the university, the department, his/her co-workers, and his/her job.

YOUR RESPONSIBILITIES AS A BUDDY INCLUDE:

- Being an informational resource for the new employee on policies, procedures, work rules, norms, etc.
- Providing insight, feedback, and information that support the new employee's social involvement in the department
- Assisting in training the new employee
- Being a tour guide; provide introductions
- Identifying resources to help the new employee

A NEW EMPLOYEE WILL EXPECT THE FOLLOWING FROM YOU:

- Advice, guidance, encouragement, and a positive attitude
- Confidentiality with shared information
- Honest feedback
- Help in understanding the culture of our company and the branch
- Help in understanding how to get things done
- Assistance in building networks and relationships within the department and with customers
- Insight into how to make relationships with people effective and productive
- How to balance three forms of communication – E-mail, telephone, in-person

TIPS FOR BUDDIES

- Don't worry about being perceived as the "expert." Your experience is important to the new employee.
- You don't have to have all the answers.
- Be patient and positive. It takes time to develop a relationship. Don't try to cover everything right away.
- Buddies need to allow enough time for growth.
- Don't try to force a relationship.
- Look for a preferred style of communication and/or cultural identification.
- Don't try to turn the new employee into your clone. That person may have a different style from yours.
- Let the new employee develop.
- Listening may be more important than giving advice.
- Don't be judgmental; ask questions such as "What do you need?" "What makes you feel that way?" "How can I help?"; don't draw conclusions without exploring the reasons why someone feels or acts a certain way.

- Keep a good attitude and stay in a teaching spirit.
- Don't lose heart because of a new employee's failures. You cannot always ensure success, but you can help that person to begin again more intelligently.

BUDDY SCHEDULE

New Employee's Info:

Name:_____

Job Title: _____

BEFORE THE NEW EMPLOYEE STARTS

- Assist the manager in preparing the new employee's work area by ensuring that the work area is clean, and has a computer, phone, trash can, office supplies, etc.
- Review the new employee's background so you are familiar with their experience.

WEEK ONE

- Meet and greet the employee on their first day with you.
- Take the new employee on a tour of the location and introduce them to other employees.
- Explain mail procedures, using the copier/fax/scanning machines, and any other procedural information specific to your department.
- Show them their work area and ensure they have all the supplies they need.
- Assist new employees with any questions he or she may have.

FIRST MONTH

- Have informal check-ins throughout the month with new staff member to if they have any additional questions or if you can assist them in any way.
- Review what has already been covered

AFTER THE END OF THE FIRST MONTH

- Buddy relationship may continue informally as desired or needed.

BENEFITS TIMELINE

All elections made cannot be changed or cancelled until open enrollment (summer) unless there is a qualifying life event (QLE): marriage, birth, adoption, divorce, or an eligible dependent gains or loses coverage.

Election of any benefit coverage:

- In ERS (NOT P.A.S.S.!!!) ERS Homepage
    - Click on "Not Registered?/Register Now"
    - Enter necessary information
    - Problems? Call 713-743-3988 (HR Service Center)
- Verify your benefits in ERS, NOT P.A.S.S.!!!

MEDICAL INSURANCE (60 DAYS TO ELECT)

- One option for medical insurance: POS (Point of Service)
- All full-time benefits eligible employees are automatically enrolled
- Part-time benefits eligible employees **MUST** elect coverage within their **first 60 days** of employment
- Includes medical, vision and prescription drug coverage
- Your medical card will not be mailed to you by ERS until after the coverage begins
- ERS (877-275-4377)

DENTAL INSURANCE (30 DAYS TO ELECT)

- Two options for dental insurance
    - DHMO: You must use in-network dentist only
    - PPO: You may use a dentist inside or outside of the preferred network of dentist
- Dental insurance **MUST** be elected by all employees if desired (it is NOT automatic)

OPTIONAL LIFE INSURANCE (30 DAYS TO ELECT)

- If elected within 1st 30 days, no evidence of insurability (EOI) is required for 1 or 2 times your salary
- If not elected within 1st 30 days, you will have to wait until open enrollment (July) and will be required to complete EOI
- You may elect one, two , three, or four times your salary

ACCIDENTAL DEATH & DISMEMBERMENT (AD&D) (30 DAYS TO ELECT)

- Available from $10,000 to $200,000 AD&D insurance (costs range from .20/month to $4.00/month)
- After 30 days, elections and cancellations are available only during open enrollment (July)

DEPENDENT TERM LIFE (30 DAYS TO ELECT)

- Provides a $5,000 term life insurance policy for your eligible dependents
- Cost is $1.38/month regardless of the number of dependents

DISABILITY COVERAGE (30 DAYS TO ELECT)

- Monthly premium calculated online in ERS based upon your monthly salary
- Short-Term Disability
    - Pays 66% of your monthly salary up to $6,600
    - Available after 30 day wait period
    - Coverage for up to 5 months
- Long-Term Disability
    - Pays 60% of your monthly salary up to $6,000
    - Available after a 180 day wait period
    - Coverage until age 65 (if under age 60)

TEXFLEX FLEXIBLE SPENDING ACCOUNTS (30 DAYS TO ELECT)

- Pledge from September – August
- Two different accounts
    - Health Care Account ($180/mo. min, up to $2,500/mo. max)
    - Dependent Care Account ($180/mo. min, up to $5,000/mo. max)
- Cannot transfer money from one account to another
- Cannot increase or decrease your account during plan year
    - Can only increase if you have a QLE
- Can rollover up to $500

OPTIONAL BENEFITS

- Visit the Benefits Website for additional information for Aflac, Metlife, and any of the benefits mentioned.

EQUIPMENT CHECKLIST

Having the necessary equipment and supplies available on the first day of work allows a new employee to be immediately comfortable on the job. Requests for computer and phone equipment and services should be done prior to the new employee's first day.

Equipment, supplies and information include:

- ☐ Campus Map
- ☐ [Keys to the building/office](#)
- ☐ Telephone,
    - o Phone directory of the department and other useful contacts (e.g. Human Resources, Business Services, IT Help Desk)
    - o Voicemail codes and Instructions
- ☐ Computer
- ☐ Printer (codes if required)
- ☐ Photocopier (codes, maintenance, supplies)
- ☐ Fax Machine (codes if required)
- ☐ General Office Supplies (stapler, tape dispenser, pens, scissors, paper)
- ☐ How to request equipment, repairs and supplies
- ☐ Organizational Charts
- ☐ [Business Cards](#)
- ☐ Order form for additional office supplies
- ☐ _____
- ☐ _____
- ☐ _____

SETTING UP COMPUTER ACCESS

To request computer access, send the following information to your IT Specialist

Procedure for New Hire (Full Time Staff or Work-study)

- Name of Staff/Work-Study PS #

- Department

- Start Date

- Location Room Number

- Specify whether they are going to be full time or part time staff.

- Name of department network share drives they would need access to.

- Off Campus Equipment. A PRP-2 form must be filled out for all off campus items.

- If the new hire is a student worker please make sure to fill out and sign a Sponsored "Personal Account" Application which can be downloaded from here: http://www.uh.edu/infotech/services/accounts/sponsored/index.php

This is to request an Exchange email account and or a Cougarnet account for the student worker if they do not already have one. This form should be signed and submitted at least 3 business days before new hire start date. **If the person is a full time staff then a Sponsored Personal Application does not need to be filled out unless the department wants the person to start before the actual start date.**

AREA/OFFICE TOUR

Providing a tour of the new employee's work area can prevent him/her from being or feeling lost or confused during the first week. Orientation to the physical environment can be accomplished on the first day of employment.

A tour of the employee's work location might include:

- ☐ Overview of immediate work area
- ☐ Restrooms
- ☐ Break/lunch rooms
- ☐ Kitchen, including any department procedures
- ☐ Vending machines
- ☐ Supply room, including any department procedures
- ☐ Emergency and first aid supplies
- ☐ Photocopy and fax machine, including instructions on use
- ☐ Mail Centers
- ☐ Transportation services and stops
- ☐ Emergency Evacuation/Plans
- ☐ Other department locations on campus the employee may frequently interact with
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

QUESTIONS FOR THE EMPLOYEE

FIRST WEEK QUESTIONS (Conducted by supervisor/manager)

- Do you have any questions regarding New Hire Orientation?
- Do you need any additional information regarding your benefits?
- Do you have all the equipment and/or work tools you need?
- What other questions do you have?

CHECK-IN QUESTIONS (Conducted by supervisor/manager)

- How is your job going?
- Is it what you expected when you were hired?
- Any surprises? If yes, what were they?
- Has training been helpful?
- Is there any training that you are interested in attending?
- Has your Buddy been helpful?
- Can you suggest any changes for the Buddy program?
- Do you know where you stand in terms of your progress since you started working?
- How are your relationships with your co-workers?
- Do you have suggestions on how we could improve our work across the department?
- Are there any questions you still have/ is anything still unclear?
- Is there something we should be providing to new employees that we have missed?
- Do you feel out of the loop about anything?
- Is there anything that you need and to which you don't have access?
- Do you have any general suggestions?
- Do you have any general work needs that haven't been met?
- Is there anything you would like to tell me that I have not asked you?

EMAIL TEMPLATES

INTRODUCING EMPLOYEE TO DEPARTMENT

To [staff in new employee's work area/department]:

I'm very pleased to announce that [new employee] will be joining us as [job title] on [start date]. [New employee] will be responsible for [insert information about what he/she will be doing].

[New employee] has recently [information about recent relevant employment background].

Please come to [location of welcome gathering] on [date] to meet [new employee] and welcome [him/her] to our team!

You can reach [new employee] at:

- [work address/office location]
- [phone number]
- [email address]

INTRODUCING EMPLOYEE TO DEPARTMENT

Dear [department name] team:

I am delighted to announce that [new employee's name] will be joining our department as [job title of new employee] on [start date].

[Name of "Buddy"] will be assigned to help [new employee's first name] during the orientation process. However, all of us will be responsible for helping [new employee's first name] become a productive member of our team.

Please join me in extending a heartfelt welcome to [new employee's first name] on [his/her] first day.

Sincerely,
[Manager's/Supervisor's Name]

*Adapted from Jean Barbazette, *Successful New Employee Orientation* published by Pfeiffer & Associates, copyright Jean Barbazette, 1994 www.thetrainingclinic.com

WELCOME LETTER (from supervisor/manager)

Dear [Employee's first name],

Welcome to [department name]! I am delighted you are joining us as a [new employee's job title]. Your role is critical in fulfilling the mission of our department and the University of Houston.

Please arrive at [time] on [date] at [location] and ask for [designated staff member]. You can park at [location] and, if you don't have a vehicle, here is a schedule of public transportation that may be helpful [provide a link or include information in the package about public transportation].

You have been assigned a Buddy (named below) to help you become better acquainted with our department and your new position. Your Buddy is available to assist you with any questions you may have during your first weeks and months. A buddy can provide the following:

- Advice, guidance, and encouragement
- Confidentiality of shared information
- Honest feedback
- Help in understanding the culture of our university and the department
- Help in understanding how to get things done
- Assistance in building networks and relationships within the department and with customers

Your "Buddy":

Buddy's contact information:

The [department name] team is here to support your transition so, please know that you can call on any of us to assist you. We are looking forward to you joining our team and your success at the University of Houston.

Sincerely,

[Manager's/Supervisor's Name]
[Manager/Supervisor's Title]