Manager's Onboarding Checklist

Successful onboarding is an intentional collaborative effort that encompasses various departments, Human Resources, and services across campus, all needing to work together seamlessly to welcome new and transitioning employees.

Whether you are onboarding a new employee from outside the University or you are welcoming an employee who is transferring from another department you must plan for their success in their new position. The following checklists includes items for you to consider and actions to take for successful onboarding in your area.

A manager's goal in onboarding is to:

➢ Create a sense of belonging, commitment and excellence in your environment
➢ Help the employee understand their role in your department and its value to the overall mission of the University
➢ Provide the employee with tools to be successful and strategies to navigate within the new role.

Before the new employee arrives:

TASKS	NOTES
☐ Establish a meeting schedule for the new employee's first week and months (with you and your team)	
☐ Create a department orientation agenda to share on the first day	
☐ Assign a mentor to coordinate the orientation and training	
☐ Create a training plan. See the guide below	

☐ Set up the work area for the new employee.
  ☐ Desk
  ☐ Office supplies
  ☐ Computer, phone and network services *
  ☐ Garbage and recycling receptacle *	

☐ Make a personal contact with the new employee by email or phone to answer their question before they start after HR's notification of acceptance.
  ☐ Discuss start date & time
  ☐ Work schedule (start & end time, breaks and lunch)
  ☐ Who to meet on the first day (HR/ Director/ Immediate Supervisor)
  ☐ Location
  ☐ What to wear
  ☐ Previously scheduled vacation
  ☐ What to expect
  ☐ Where to park* (See instructions to Request a Parking Permit Online)	

☐ Email the team an informal announcement about the new employee along with a short bio.	

TASKS	NOTES

☐ Arrange for temporary parking for first day (if not requested in advance by employee).
    ☐ *Parking services guest permit*
    ☐ *Instructions to Request a Parking Permit Online*	

* RESOURCES	

IT Services
    ☐ *Request for Banner Services Form*
    ☐ Phone, Computer Services, Share Drives
        o YSU Tech Desk, techdesk@ysu.edu or x1595
    ☐ Activate a New Account, password self-service instruction guides	

Keys ☐ University Locksmith, wwagnon@ysu.edu or x3241	

Business cards, badges and office signage
    ☐ Business cards - Creative Digital Design, creativedigitaldesign@ysu.edu or x7166
    ☐ Office signage - Facilities, facilities@ysu.edu or x2953
    ☐ Name badges - Graphic Services, graphics@ysu.edu or x3560	

Recycle bins ☐ Contact Dan Kuzma, djkuzma@ysu.edu or x2294	

Space is provided for adding other tasks or resources.

First day:

TASKS	NOTES
☐ Welcome new employee	
☐ Provide a department orientation agenda, org chart, team member names with short bio, position description o See *How to View and Print a Job Description*	
☐ Introduce the new employee to the other team members	
☐ Explain your department's function in the University, relationship to other departments, students and/or customers.	
☐ Explain their role in the scope of your department's function.	

☐ Tour the department
     o Restrooms
     o Coat rack
     o Break rooms/refrigerator
     o Supply cabinet
     o Vending machines
     o Stairs/ elevators
     o Emergency exits and/or shelter
     o Other conveniences nearby (coffee, restaurants, etc.)	

☐ Allow time to explore the new environment and set up the work area.	
☐ Secure signatures for IT Services forms, key cards, etc.	
☐ Tour Kilcawley Center o Join new employee and mentor for lunch	

☐ Assist with first access to a University computer and phones
     o Sign in and walk them through Password Self-Service
     o Assist with setting up a voice mail
     o Assist with accessing email and setting a professional signature	

First Week:

TASKS	NOTES
☐ Review Web Time Entry or Leave Reporting instructions o See the *Web Time Entry/ Leaving Reporting* resource page	
☐ Follow-up discussion of one-to-one meetings with team members	
☐ Assign tasks for the week	
☐ Follow-up with mentor (clarify and plan activities)	
☐ Follow-up with new employee	

Space is provided for adding other tasks or resources.

First 30 days:

TASKS	NOTES

☐ More introductions, if applicable
      o Professional connections to new employee in other departments/ units.
      o Campus leaders	

☐ Discuss performance appraisals
      o What makes a person successful in this role?
      o See bargaining agreements for evaluation schedules
      o Discuss probationary period, if applicable (See bargaining agreements)	

☐ Schedule systems training *
      o Banner
      o Email
      o eCUBE
      o Concur
      o Specialized software / systems	

* TRAINING RESOURCES
Activate a New Account, Password Self-Service guides
Concur
eCUBE
Get to know Office 365
PCard
Productivity Software
Training and Development , Various topics
Web Time and Leave Reporting

Space is provided for adding other tasks or resources.

First 90 days:

TASKS	NOTES
☐ Check in regularly about training plan. o Inquire about their impression of work, team relationships and understanding of their role.	
☐ Plan unit activities which build team cohesiveness (meetings, icebreakers, lunch)	
☐ Follow-up with employee on training and performance	

First 180 days:

TASKS	NOTES
☐ Conduct performance appraisal	

Additional Reading:

Executive Coaching Article - Men and Women in Leadership - Helping Their Employee Succeed

Assigning a Mentor/ Being the Mentor Article – Using Mentoring to Develop Employees

Team Building Strategies Articles – Seven Strategies for Developing Cohesive Teams

Steps to Building an Effective Team

Space is provided for adding other tasks or resources.

Training Plan

Training is directly related to the skills, knowledge, and strategies necessary to do a particular job. A formal training plan will assist you in structuring development of your employees. It is important to specify what your employees are to know, any details of the training and methods or activities where employees will acquire the knowledge explained in the objectives. What is the evidence of a successful training experience? Will it be evaluated?

Date Scheduled	Training Goals	Learning Objectives	Method/ Activity /Contact	Evidence	Evaluation Method

Resources

Garfinkle, J. (n.d.). How men and women in leadership can help their employees succeed. Retrieved October 14, 2013, from Garfinkle Executive Coaching Web site at http://www.garfinkleexecutivecoaching.com/

Heathfield, S. M. (2014, August 21). *Use Mentoring to Develop Employees*. Retrieved from About.com: http://humanresources.about.com/od/glossarym/g/mentoring.htm

Schreiner, E. (2014, August 21). *Small Business Chronicle*. Retrieved from Chron: http://smallbusiness.chron.com/seven-strategies-developing-cohesive-teams-17354.html

St Olaf College. (2014, August 21). *St Olaf College Orientation*. Retrieved from www.cupahr.org: http://www.cupahr.org/knowledgecenter/kc_template.aspx?id=11685

University of California, Berkeley. (2014, August 21). *Steps to Building an Effective Team*. Retrieved from VC Administration and Finance: http://hrweb.berkeley.edu/guides/managing-hr/interaction/team-building/steps

University of Florida, T. O., & Development, U. o. (2014, August 21). *Onboarding Advocacy*. Retrieved from Maximize Your Leadership Potential: http://hr.ufl.edu/wp-content/uploads/leadership/resources/job_aids/onboarding_advocacy.pdf

Youngstown State University, Office of Human Resources. (2014, August 21). *Bargaining Unit Agreements*. Retrieved from Bargaining Unit Agreements: http://web.ysu.edu/gen/ysu/Bargaining_Unit_Agreements_m760.html