



## **PARTICIPANT GUIDE**

*Version 1.1 (updated 1.07.2015)*

# **New Employee Onboarding Onboarding Basics**



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## **NEW EMPLOYEE ONBOARDING: ONBOARDING BASICS**

The University of Wisconsin-Madison is committed to supporting new employees in their successful transition to our workplace, as well as supporting the university's need to quickly enable new employees to achieve high levels of proficiency. In part, successfully transitioning requires an onboarding program that engages each new employee beginning with the acceptance of the University job offer, and continuing through the entire first year of employment.

Documented onboarding programs that reflect common definitions, timing, activities, and roles – along with consistent execution and evaluation – will enhance employee engagement and job satisfaction, and shorten the time from hire to full productivity.

### **PURPOSE**

This workshop will introduce you to Onboarding and provide the foundation, explanation and support to enable you to initiate or refine an onboarding program within your unit.

### **LEARNING OBJECTIVES**

Upon completion of this workshop, you will:

- Be able to define Onboarding
- Understand the goals, outcomes and roles involved in Onboarding
- Understand the details and responsibilities of the Onboarding Policy
- Create the basic framework for an Onboarding program in your unit
- Define an action plan for completing and implementing Onboarding in your unit



What are your expectations for this class? What personal or departmental benefits do you anticipate from completing this class?

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### **TO LEARN MORE:**

Visit [ohrd.wisc.edu](http://ohrd.wisc.edu)

- Reference materials
- Templates
- Upcoming HR Design events

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## **AGENDA**

- What is Onboarding?
  - Definition, Roles, Goals and Outcomes
- The Onboarding Policy
  - Policy Overview
  - Policy Detail
- Your Onboarding Program
  - Framework
  - Resources
  - Action Plan
- Check for Understanding



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 **What is Onboarding?**

Onboarding is integrating and acculturating new employees into the organization and providing them with the tools, resources, and knowledge to become successful and productive.

  
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Onboarding Basics

**WHAT IS ONBOARDING?**

Research has clearly shown that a well-designed and -executed onboarding program will reinforce a new employee’s job choice. Onboarding enhances job satisfaction/engagement and shortens the time from hire to full productivity by ensuring that new employees receive the support, tools and resources they need, including a welcoming environment and clear expectations from their supervisors. When a new employee experiences a positive onboarding experience, his or her commitment to both the new role and the university is strengthened.

Onboarding is integrating and acculturating new employees into the organization and providing them with the tools, resources, and knowledge to become successful and productive.



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**WHAT ARE THE GOALS OF ONBOARDING?**

- Accommodating: Getting the new employee the tools, resources, and training to be successful
- Acculturating: Helping the employee understand and navigate the culture of the organization
- Accelerating: Minimizing the time before new employees are productive members of their workgroup

**WHAT ARE THE OUTCOMES?**

- Job satisfaction
- Employee retention
- Engagement and commitment
- Faster time-to-productivity

**ORIENTATION V. ONBOARDING**

Onboarding is a long-term support system that integrates new employees into the organization using a comprehensive plan.

<b>Orientation</b>	<b>Onboarding</b>
During week 1	Throughout year 1
Familiarize with organization’s structure, mission, and policies	Actively involve in activities to align with organization culture, goals, and mission
Employee attends presentations	Employee is actively engaged/mentored
Often performed primarily by HR	Involves multiple people and departments, including managers



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## WHAT ARE THE PRIMARY ROLES IN ONBOARDING?

Typical roles in the onboarding process are outlined below. Roles are sometimes overlapped or combined and responsibilities are often delegated to fit the needs of a particular division/department/unit.

Role	Responsibilities
Onboarding Coordinator	<ul style="list-style-type: none"><li>• Oversees entire onboarding process</li><li>• Coordinates tasks within the onboarding process</li><li>• Ensures immediate administrative needs of the new hire are met</li><li>• Coordinates meetings and scheduling – serves as the point person for new hire</li><li>• Tracks progress of the onboarding process</li><li>• Ensures new hire has an opportunity to provide feedback on the onboarding experience</li></ul>
Supervisor/Manager	<ul style="list-style-type: none"><li>• Welcomes new hire</li><li>• Peer partner assignment</li><li>• Communicating job expectations</li><li>• Meaningful work assignment</li><li>• Training/development plan</li><li>• Communicating department vision/mission/culture</li><li>• Availability/Frequent check-ins</li><li>• Timely performance feedback</li></ul>
Peer Partner	<ul style="list-style-type: none"><li>• Welcomes new hire</li><li>• Provides introductions</li><li>• Checks-in frequently</li><li>• Assists new hire with navigating the culture of the organization</li><li>• Serves as a resource or connects new hire with resources to answer specific questions</li></ul>



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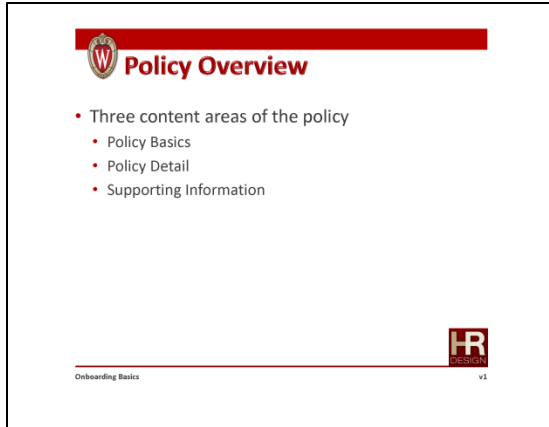
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The slide titled "Policy Overview" features a red header bar with a white "W" logo on the left and the title "Policy Overview" in white text. Below the header, a bulleted list contains three items: "Three content areas of the policy", "Policy Basics", "Policy Detail", and "Supporting Information". At the bottom right, there is a red "HR" logo. At the bottom left, the text "Onboarding Basics" and "v1" are visible.



Resource: The policy can be found at [www.ohrd.wisc.edu](http://www.ohrd.wisc.edu) under HR Design Resources.

## **THE ONBOARDING POLICY**

The Office of Human Resources supports campus onboarding efforts through a variety of means, including through the onboarding policy and associated training and tools. The policy and associated training and tools are intended to provide new employees with a comprehensive onboarding experience that reinforces their choice to work at UW-Madison and supports them in performing the functions of their job at a high level.

### **THREE CONTENT AREAS**

- Policy Basics
- Policy Detail
- Supporting Information

#### **Policy Basics**

The Policy Basics content area summarizes the policy, gives the rationale for having a policy and most importantly explains who the policy applies to and who has responsibility for ensuring implementation.



It is the expectation that all campus colleges/schools/divisions fulfill the requirements of the policy. It is the responsibility of the dean's or director's office to ensure policy implementation and compliance.

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## Policy Detail

The Policy Detail content area outlines the expectations for five areas.

### 1. Program development and training

- Each college/school/division is required to develop, implement, monitor and maintain a documented onboarding program.
- Colleges/schools/divisions are **allowed the flexibility** to delegate program creation to departments/units.
- The Enhanced Onboarding workshop will fulfill the required training element.




### 2. Program minimum requirements

- Programs should span one year.
- Program will detail activities, when they occur, to whom they apply, and who is responsible for completing the activity.
- Each program will designate and **onboarding coordinator** that has primary responsibility for maintenance of the program.



### 3. Required program activities

- a. Orientation to work unit for all new employees.
- b. Communicate an onboarding contact.
- c. New hires and supervisors are scheduled to meet on employee's first day.
- d. Each new hire is assigned a peer partner.



Activities b, c, and d are recommended, but optional for faculty, student assistants, and employees-in-training.

### 4. Program evaluation

- Collect feedback from each new employee about their onboarding experience at least once within the first year of employment.
- OHR will collect feedback on a regular basis

### 5. Document control and retention

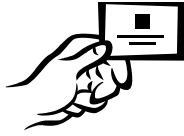
- Divisional human resource representatives shall maintain a copy of all programs
- Each college/school/division shall maintain a list of its designated onboarding coordinator(s)

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### Supporting Information

The final content area of the policy outlines supporting tools, definitions, and a responsibility chart.

Tools and resources will be frequently reviewed and updated to reflect the needs of campus. Your primary contact for onboarding consultation is:



Christine Ray  
Office of Human Resources  
cray@ohr.wisc.edu



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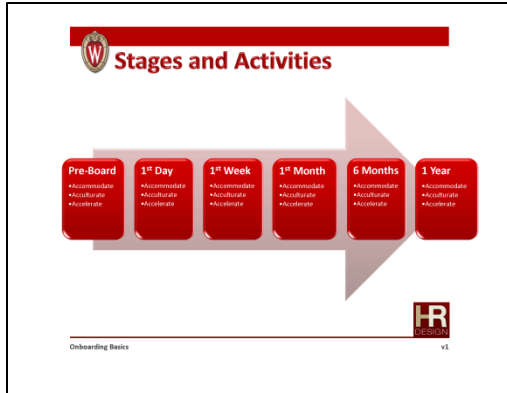
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Resource: A sample coordinator checklist can be found at [www.ohrd.wisc.edu](http://www.ohrd.wisc.edu) under HR Design resources.

## **YOUR ONBOARDING PROGRAM**

Whether you are building a program from scratch or enhancing an existing program, it’s important to break down the time frame into manageable elements. Integrating into a new job and environment takes time and each stage has a particular objective.

Stage	Objective	Sample New Hire Activities
1. Pre-Boarding – Preparing for the first day	Positively impact the candidate’s first impression. Prepare them for employment and complete some administrative requirements.	<ul style="list-style-type: none"> <li>• Reviews information about the University, department, role</li> <li>• Completes initial paperwork</li> <li>• Receives welcome from coordinator</li> <li>• Receives welcome from supervisor</li> <li>• Receives onboarding plan</li> </ul>
2. First Day	Welcome the employee. A day of discovery, administrative tasks, introductions and settling in.	<ul style="list-style-type: none"> <li>• Meets with coordinator</li> <li>• Meets with supervisor</li> <li>• Meets peer partner</li> <li>• Tours workspace and department</li> <li>• Meets colleagues</li> <li>• Completes HR details</li> </ul>
3. First Week	Help the employee get acquainted with the University, school/college/division, unit, colleagues, and role.	<ul style="list-style-type: none"> <li>• Meets with supervisor</li> <li>• Registers for Benefits 101 and the campus New Employee Orientation</li> <li>• Works with peer partner to learn more about the culture of the division and unit</li> <li>• Begins on-the-job-training or shadows</li> </ul>
4. First Month	The employee becomes a productive member of your team and the University	<ul style="list-style-type: none"> <li>• Introduced to partner departments and associated units to learn their functions</li> <li>• Attends campus New Employee Orientation and Benefits 101</li> <li>• Meets with peer partner</li> <li>• Meets with supervisor to discuss expectations and training plan</li> </ul>







**Continue the process** for the first week, first month, six months and one year.

A series of horizontal dashed lines for writing.

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 **Resources**

- Resources can be found at [www.ohrd.wisc.edu](http://www.ohrd.wisc.edu) under HR Design resources.
- Onboarding policy
- Sample coordinator checklist
- New Employee Onboarding – Supervisor’s Resource
- Sample welcome email
- Sample welcome video
- Link to New Employee Orientation (NEO) registration



Onboarding Basics v1

**RESOURCES**

Templates and samples can be found on the OHRD website. Visit the site often as many new resources are being added in the coming months. Tools and resources will be frequently reviewed and updated to reflect the needs of campus. Your primary contact for onboarding consultation is:



Christine Ray  
Office of Human Resources  
cray@ohr.wisc.edu



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## CHECK FOR UNDERSTANDING




### Check for Understanding

1 of 8  
Onboarding is....

- A one-day training session conducted by human resources.
- A year-long process that begins before the employee arrives for their first day.
- Providing new hires with bagels and coffee.


Onboarding Basics  v1




### Check for Understanding

2 of 8  
The goals of onboarding include:

- Frustrate, Exacerbate, Consolidate .
- Ignore, Overwhelm, Disengage.
- Accommodate, Acculturate, Accelerate.

Onboarding Basics  v1


**(continued) CHECK FOR UNDERSTANDING**

 **Check for Understanding**

3 of 8


Which of the following is not an outcome of onboarding?

- Pay increases
- Employee retention
- Faster time-to-productivity
- Job satisfaction

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Onboarding Basics

 **Check for Understanding**

4 of 8

Which three of the following are typical roles in the onboarding process?


- Manager/Supervisor
- Onboarding Coordinator
- The Chancellor
- Peer Partner

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Onboarding Basics


**(continued) CHECK FOR UNDERSTANDING**

 **Check for Understanding**

5 of 8


The onboarding policy outlines expectations for which of the following:

- Program development and training
- Standardized position descriptions
- Required program activities
- Program evaluation



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Onboarding Basics v1

 **Check for Understanding**

6 of 8

Which of the following is not a recommended onboarding activity for all new employees:


- Learning the lyrics to Varsity
- Meeting with his/her supervisor on the first day
- Receiving a peer partner
- Receiving an orientation to their work unit



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Onboarding Basics v1

**(continued) CHECK FOR UNDERSTANDING**

 **Check for Understanding**


7 of 8  
Which of the following is not a recommended stage in an onboarding program:

- First Day
- Twentieth day
- First Year
- Pre-Boarding




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Onboarding Basics v1

 **Check for Understanding**

8 of 8  
Where can you find onboarding resources?

- [www.ohrd.wisc.edu](http://www.ohrd.wisc.edu)
- Contact Christine Ray
- Attend future onboarding classes



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Onboarding Basics v1

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## **THANK YOU**

- **Christine Ray**  
Office of Human Resource Development  
[cray@ohr.wisc.edu](mailto:cray@ohr.wisc.edu)



## **TO LEARN MORE:**

Visit [ohrd.wisc.edu](http://ohrd.wisc.edu)

- Reference materials
- Templates
- Upcoming HR Design events



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