

Onboarding Toolbox: Successfully Onboarding New Employees

Human Resources

Introduction

Congratulations! You have just hired a new employee to your department. As a manager, you play an important and critical role throughout the employment relationship, and particularly through the onboarding process. This is an important, exciting and challenging time for a new employee. Your support and guidance will help to support a successful transition into their new role, and it will set the stage for building a meaningful and effective employee-manager relationship.

Onboarding occurs as soon as an offer of employment is made and ends after the first three months of employment. A successful onboarding process will make the new employee feel welcomed, valued and will help the employee to confirm their decision about joining the Brock University team. The onboarding process will also ensure that the employee has all of the tools and resources available to them to be successful in their role.

While the University provides some general onboarding events and information, the key to a successful onboarding, is the planning you put into it as the Manager. Onboarding is an ongoing process that ensures your new hire successfully adjusts to the University and departmental culture and can effectively perform his/her job as soon as possible.

Should you need additional support please contact a member of the [Organizational Development & Talent Acquisition team](#).

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Supervisor/Manager Checklist

Employee's Name: _____ Job Title: _____

Start Date: _____ Supervisor's Name: _____

Please use this checklist as a training aid. Add and delete items as necessary in order to include all necessary onboarding items.

Before New Employee Arrives

Communication

Send an email ([see sample](#)) or post an announcement to notify employees of the new employee on their first day, including a bit of background information on the new employee

Contact new employee to let them know that you are looking forward to their first day, review necessary information for their first day e.g. starting date, location of office/directions, dress code, who to report to, and any information the individual may require ([see talking guidelines](#))

Talk with current members about the new employee's role and responsibilities; plan who will do what in the new employee's onboarding

Workspace

Prepare work area, ensure that all necessary office equipment or work tools are ready and available e.g. software, telephone, pens, paper, computer, chair, desk, safety equipment etc., and that the work area is clean and tidy

Ask the Administrative Support individual, within the department, to arrange for IT access and telephone assignment (Human Resources will send the employee number to IT for access to be granted)

If it is a new workspace contact Facilities Management for set-up

Training Schedule

Arrange your schedule to ensure you have adequate time to spend orienting the new employee

Ensure that all stakeholders (e.g. Directors, co-workers, etc.) are available for meeting with the new employee within the first couple days of employment. Schedule time for each stakeholder to meet with the new employee

Appoint and orient a [peer mentor](#)

Create an onboarding training agenda, in order to keep things timely and orderly

Make sure that a co-worker or peer mentor is available to have lunch with the new employee on their first day

Prepare a list of priorities for the first week, and first month of the job

Gather materials, files or projects that will be useful for the employee to review. You may wish to include departmental strategic plans, departmental and University Emergency Management Plans, organization charts for the University and your department, and any other department specific information that may be useful

Consider additional training that may be required, and make arrangements with the appropriate personnel both internally and externally to the department as needed

(e.g. student information system, purchasing online system, email, scheduling programs, departmental databases, etc.)

Administrative

Make sure that all necessary documentation is completed ahead of time, or available if it needs to be completed on first day of employment

[Request ticket](#) for setup of the new employee's email account, computer access & passwords with ITS

Order [business cards](#), name tags etc. as appropriate

Add new employee to appropriate departmental directories and email lists

Employee's First Day

Welcome & Tour

Personally welcome the new employee and pick them up in Human Resources (ST 1220) at 8:45am on their first day (if the employee is internal to Brock you may wish to have them meet you at the department, instead of HR)

Show the employee to his or her work area

Give a tour of department and workspace, including restrooms, break room, emergency exits and emergency assembly points, storage areas, etc.

Introduce the new employee to his or her co-workers, briefly explain each individual's job title and position responsibilities

Introduce the new employee to his/her peer mentor

Take new employee to lunch, or ensure that a colleague is available to have lunch with them

If the employee is new to Brock show them some basics about the campus, e.g. where to eat, where to get coffee, etc., the employee will participate in a full campus tour when they participate in the New Employee Orientation training facilitated by Human Resources

Expectations & Company Norms

Provide employee with copy of his/her job description

Review job duties and responsibilities

Explain company norms and informal policies/procedures, even those that seem frivolous e.g. if it is acceptable to have snacks or coffee at their desk/work station, what is appropriate to decorate their work space, use of lunchroom, etc.

Review Hours of work

- Work week and core hours
- Lunch break - when and how long
- Break periods - when and how long
- Work schedule changes - who approves changes
- Flex schedule discussion
- Attendance expectations
- Overtime expectations
- Punctuality

Review departmental 'dress code' guidelines, including what is appropriate to wear on Fridays

Review specific office procedures or protocols (e.g. vacation scheduling, sick leave call-in, etc.)

Refer to Collective Agreements (where applicable)
Review University & Human Resources policies <http://brocku.ca/university-secretariat/university-secretariat/policies>

Building & System Access & Information

Review how to log in to my.brocku.ca portal
Provide instruction for building access (keys, passwords, access codes etc.)
Take them to the Brock Card Office to ensure they get their [Brock One Card](#) staff card set up
Show them where the Parking Services building is and ensure they take some time during the day to get their parking permit
Issue equipment and work tools where appropriate
Demonstrate how to use telephone, the appropriate manner to answer the telephone, personal calls and email policy, set up of voicemail (provide written instructions for future reference)
Review building and workplace security issues, restricted areas

Departmental Information

Provide staff directory with telephone numbers and emails
Show location of supplies
Review how to order supplies
Provide copy of seating chart

Health & Safety Information

Location of first aid
Housekeeping and safety of building and work space

Training Schedule

Describe the onboarding plan for the first few days
Give the employee a copy of the email announcing their arrival if one has been prepared and distributed
Give initial work assignment
Meet with the new employee at the end of the day to answer questions and to find out how the day went

Employee's Second Day

Introduce the employee to anyone that was not in the Office on Day 1

Departmental Information

Cover mission statement and operational objectives
Review organizational charts. Define the department's function and interrelationships with other departments. Review reporting structures.
Explain where to get department help and information
Review of specific information pertinent to department
Review procedures for handling confidential information
Describe regular meetings and other scheduled items
Review how to book meeting rooms

Show share drive(s) and how to save information

Workplace Norms & Expectations

Describe who and how to notify about sick and vacation time

Discuss overtime needs and assignments

Discuss what is acceptable/unacceptable for after hour access to work facilities, where applicable

Review Brock website and relevant tabs (where to locate information)

<http://www.brocku.ca/brock-a-to-z>

Review inclement weather & emergency procedures, and where to locate information (e.g. email, website, phone system, etc.)

Building & Systems Access & Information

Review computer information including:

- Overview of policies and procedures, including requesting repairs, department standards for software and hardware, appropriate use of email and confidentiality
- How to remotely access files ([Brockbox](#)) and email (mailbox.brocku.ca)
- Assessment of employees knowledge and comfort with department's hardware and software

Review how to access voicemail when off campus

During the First Week

Expectations

Provide and review list of priorities for the first week, and first month with the employee. Establish short term goals.

Begin the performance planning process

Policy & Procedure Overview

Confidentiality issues (documents, personal information, client information, etc.)

Review employee policies and procedures

Ensure employee familiarizes them self with University policies, procedures, acts and governing bodies - refer to [Secretariat's](#) website

Follow up

Meet daily to answer questions and find out how the day went, provide reassurance and let the employee know how valuable his/her contribution is to the department and the University

Training

Ensure incumbent completes the Accessibilities for Ontarians with Disabilities Act (AODA) online training

Review tools/resources applicable to their specific job

Ensure Employee Registers and attends the [New Employee Onboarding](#) training

Ensure employee completes [Health and Safety training](#), including WHMIS

Within First Month of Employment

After the new employee's first week, set a regular schedule to meet. [Discuss items](#) from your onboarding plan, ask for the employee's assessment of how the onboarding process is going and identify specific support you can provide
Review performance feedback and appraisal process

Discuss job-related achievements
Review goals, objectives and work plans
Review progress and performance expectations
Identify further training needs and opportunities
Answer questions arising from onboarding

During Probation

Refer to Performance Management Guidelines <http://brocku.ca/hr-ehs/performance-management>
Discuss job-related achievements, problems or concerns
Review goals, objectives and work plans
Review progress and performance expectations
Schedule probationary performance evaluation
Discuss job-related problems or concerns
Evaluate onboarding program and provide feedback
Other - specify

Conduct End of Probation Review

Complete Performance Review and Planning form and meet with employee to discuss (forms available <http://brocku.ca/hr-ehs/performance-management>)
Complete End of Probation paperwork with Human Resources

Upon Successful Completion of Probationary Period

Meet with the employee to confirm and congratulate them on the successful completion
Ensure a senior leader sends a congratulatory email or letter to congratulate the individual on the successful completion of their probationary Period

Additional Onboarding Items Specific to the Department or Job

The Peer Mentor System

A new employee will benefit from having a seasoned member of your department assigned to help them with the basics of the job, logistics of the University, and answers to the multitude of questions he/she will have. When choosing a peer mentor, it is important to select an individual who has worked at the University for a period of time, has a positive attitude and communicates well. Ensure that you provide the peer mentor with the appropriate amount of time to spend with the new employee so that she/he can be a valuable resource person.

The Peer Mentor's Role

A Peer Mentor is someone who partners with a new employee during their first three to six months of employment. They offer advice and guidance to help foster and promote the professional development of a new employee. The Peer Mentor knows the ropes, so to speak, and can be an effective source of advice and encouragement. They can offer seasoned experience in the form of training and socializing the new employee to the Brock community. With an effective Peer Mentor, a new employee will become an effective, contributing member to your department.

Ideally, the Peer Mentor will work in the same department as the employee. However, in some situations there may not be an appropriate individual within the same department. In this case, departments with similar functions, or ones located near each other, will need to team up to provide a suitable Peer Mentor. The employee's supervisor may serve as the Peer Mentor.

The supervisor and the Peer Mentor should work closely to determine which department information will be address.

The most effective choice for a Peer Mentor:

- Has been employed more than one year
- Is compatible with the new employee in age, education, temperament, etc.
- Is given time to be accessible to the new employee
- Has a good performance history
- Is skilled in the new employee's job
- Is proud of the organization
- Is a peer of the new employee
- Has patience, good communication and interpersonal skills
- Wants to be a "Peer Mentor"
- Is a positive role model (well-regarded and accepted by current employees)
- Has a positive work attitude
- Has been selected in advance and trained in "Peer Mentor" responsibilities

The Peer Mentor's functions:

- Be an information source for the new employee on policies, procedures, work rules, norms, etc.
- Help the new employee clarify assignments
- Help the new employee socialize
- Assist in training the new employee
- Be a tour guide
- Provide positive feedback and encouragement to the new employee
- Identify resources
- Help, temporarily, to sort out priorities for the new employee
- Provide introductions

What the new employee expects from their Peer Mentor:

- General advice
- Guidance
- Encouragement
- Positive attitude
- Shared information is confidential
- Honest feedback
- Clear information
- Help in understanding the culture of an organization and finding out how to get things done
- Assistance in building networks and insight into how to make them effective and productive
- Establishment of the best form of communication - email, telephone, in-person

*Tips for Peer Mentors available in Appendix C

Sample welcome email to the team

To: Team

From: Manager

Subject: Welcome Name of Employee

Dear Team:

I am very pleased to announce that Name will be joining our team as Job Title.

Name comes to us from previous employer/school, where he/she was a Job Title for # of years. Before that, he/she worked at Employer. Name brings list capabilities/competencies, or how they will be contributing to the team. Include something personal such as hobbies, sports or interests, if known.

Name's first day will be Date, and he/she will be located spot/building/floor. I will bring name around for introductions, but please feel free to stop by and introduce yourself and welcome Name to our department/faculty.

Please join me in welcoming Name to our team.

Sincerely,

Manager

Welcome Phone Call Talking Points

Congratulate your new employee

Talk about your personal style as a manager, and your expectations for employee's that work with you (e.g. preference for phone calls, texts, emails, "open door policy", etc.)

Let the employee know you will meet them at the Human Resources office on the 12th floor of the Schmon Tower, and then you will show them how to get to the department (meeting time 8:45 am), if the employee is internal to Brock you may choose to meet them at your department, rather than HR

Ask them if they have any questions or if they need any resources

If the employee is new to the Niagara Region, let them know Human Resources can refer them to various resources

Questions for Check-ins

The following questions will help you guide onboarding conversations and help you to assess how the new employee is doing

- What is going well?
- What challenges are you experiencing?
- Are there information/resources you are missing?
- What has been your best experience so far?
- What are your goals?
- Do you have any suggestions for improvement?
- Was there any information that you did not have before starting, that would have been useful?
- What management style do you work best with? What can I do to help support you?

APPENDIX A - Human Resources Checklist

The Human Resources (HR) team will help you navigate through the onboarding process. Here is a quick summary of some of the new employee onboarding responsibilities of the HR team:

- Notify hiring manager when signed employment agreement is received & give go ahead to contact new employee
- Create employee ID and notify manager of ID number & email address
- Create new employee package (confidentiality agreement, TD1 & TD1ON forms, eligibility to work in Canada, direct deposit form, etc.)
- Enter employee into the Human Resources Information System (HRIS)
- Review Employee Payroll procedures: pay cheques, direct deposit information, pay dates, problems with pay cheques, etc.
- Ensure employee is enrolled in the Benefit & Pension plans (where applicable)
- Facilitate a new employee onboarding training session

APPENDIX B - New Employee Tips & Tricks

The following is a list of resources for new employees:

This information is intended to help you orient yourself to Brock University. Some resources may have more value than others, depending on your personal circumstances.

University Overview

[University Overview](#)
[Administration & Governance](#)
[Visit and Tour Campus](#)
[Campus Map](#)

Human Resources & Training

[New Employee Training](#)
[Health & Safety](#)
[Workplace violence and Harassment](#)
[Human Resources](#)
[Employee & Family Assistance Program](#)
Accessibility for Ontarians with Disability Act Training - Access through my.brocku.ca portal

General

New to Niagara

- <http://www.niagararegion.ca/>
- <http://www.whatsupniagara.com/>

[Faculty & Staff Resources](#)
[Brock Departments A-Z](#)
[Parking Services](#)
[IT information \(email, calendar, telephones, etc.\)](#)
[Emergency Response Procedures](#)
[Recreation Services](#)
[Eating on Campus](#)
[Applying for courses](#)
[Employee Benefits Plans](#) (e.g. Tuition Waiver, LTD, health & dental)
[Campus Bookstore](#) - Employee Purchase Program
[Dell Computer Purchase Program](#)

Appendix B Continued - Tips for New Employees:

As a new employee, you will be partnered up with a peer mentor to help you navigate the policies, procedure and cultural norms of both the University and your department.

- Ask questions
- Learn to evaluate the ideas and suggestions given to you by your peer mentor. Just because something felt right to another person does not necessarily mean that it is right for you. On the other hand, it never hurts to try new things. Be open to new ways of looking at situations and doing things differently.
- The peer mentor program is just one tool for developing strengths and addressing weaknesses. Don't expect this relationship will solve all of your problems. It is your responsibility to learn to solve your own problems, but there is no reason to do that in isolation when other people with more knowledge and experience in a particular discipline or profession can offer you advice. Take advantage of others' experiences. Have patience and realize the limits of the peer mentor relationship
- Accept constructive criticism

It is important to be aware of a variety of policies that may impact you in the course of your work, familiarize yourself with the University's policies at <http://brocku.ca/university-secretariat/university-secretariat/policies>

APPENDIX C - PEER MENTOR GUIDELINES

You have been asked to act as a Peer Mentor to help facilitate a smooth transition for a new colleague. Please read and follow these tips/guidelines.

Tips for Peer Mentors:

- Don't worry about being perceived as the 'expert'. Your experience is important to the new employee
- Be patient and positive. It takes time to develop a relationship. Don't try to cover everything right away, 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
- Don't lose heart because of a new employee's mistakes. You cannot always ensure success, but you can help that person to begin more intelligently. You can help a new employee see a failed experience as valuable by honestly identifying where it went wrong
- Keep a good attitude and stay in a teaching spirit

Peer Mentor Checklist

Explain where to get supplies
Identify bulletin boards where information is posted
Show employee how to use and offer training on equipment (fax machines, phone systems, copiers, etc.)
Explain inter-office and external mail process
Explain accounting procedures such as travel reimbursement and getting invoices paid
Show work area or office; explain ability to decorate with items (contact Facilities Management to hang pictures)
Show employee other campus worksites (as appropriate for the position)
Be available to provide support and answer questions
Tour campus with focus on key offices and key contacts
Show break or lunch area within the office area
Help orient them to office "culture"

What the Peer Mentor expects from a new employee:

- **Confidentiality:** the Peer Mentor expects that the new employee can be trusted with information, whether it be technical, business, personal or otherwise
- **Constructive Criticism:** the Peer Mentor expects that the new employee will receive constructive criticism in good spirit
- **Learning:** the Peer Mentor expects the new employee will display a coachable attitude and an eagerness to learn