

A woman in a dark business suit is standing in a meeting room, gesturing with her right hand. In the foreground, the back of a person's head and shoulder is visible, looking towards the presenter. A desk with a laptop and a white mug is also visible.

# ONBOARDING TRAINING GUIDE FOR MANAGERS

## EVERYTHING YOU NEED TO KNOW ABOUT ONBOARDING

Steps to Effective Onboarding

Fun Onboarding Ideas

Employee Training

Best Practices

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# WELCOME!

We're thrilled you're going to invite a new employee to your team! We're confident they will be a great addition to our company. This guide is designed to give you all the tools you need in the first 90 days of onboarding and will ensure a consistent onboarding approach across the organization.

Onboarding is an important part of the recruiting process. A good onboarding experience can be what makes employees decide they love the company early on, or whether it may not be a fit for them. Taking on a new job is exciting, but elements of joining a new team can be stressful. As a manager, your job is to make employees feel as welcome as possible and to equip them for success in their new role!

## WHAT TO KEEP IN MIND DURING THE FIRST 90 DAYS

- 1 Get employees engaged in their role as quickly as possible. This builds loyalty early on in their employee experience.
- 2 Seek feedback from the employee on how the onboarding is working for them. Keeping our onboarding program fresh and relevant requires input from those who are experiencing it.
- 3 Ask employees what they need and want. A personalized approach will give them confidence and get them up to speed quickly.

# STEPS TO EFFECTIVE ONBOARDING

## 1 PRE-BOARDING AND FIRST DAY

Your new employees are forming an impression of your company before they even walk through the door. Think about ways to engage them between the day they sign their job offer and their first day on the job. This will set you apart from other employers and will make the employees feel connected when they show up for their first day and builds retention before they even start. Here are some pre-boarding suggestions you could employ when welcoming your new team member:

### **Send a Welcome Letter from a Company Leader (GM or Manager)**

This should be personal and express your excitement for having them come on board. Let them know why they were chosen for the job and your confidence that they will be a great addition to the team. Ask them to provide you with any pertinent information you may need to know (clothing size for uniforms, vehicle info if you need to arrange parking, etc.), so everything is set up for their first day.

### **Employ a Buddy System**

Assign a team member to send a welcome email and introduce themselves to your new employee. That person will be their “buddy” for the first month.

Duties include:

- ✓ Meeting the new hire on their first day
- ✓ Having lunch with them a few times a week
- ✓ Being available to answer any questions they may have prior to starting and thereafter

# STEPS TO EFFECTIVE ONBOARDING

## Setting Up Entry Interviews



Ask them questions about what they need to be successful in their new role, how they learn best, how you can be a supportive manager or supervisor, how often they like to be checked-in with, etc. Give them plenty of opportunities to ask you or other team members their questions

## Give Them a Later Start Time



Allow the employee to start later than your regular working start. This gives 30-90 minutes to deal with your morning tasks so you are ready and attentive when they arrive.

## Be Available All Day



Onboarding is very important and requires your time and attention. Clear the decks for the first day (and most of the first week). Think ahead to what you might need to delegate or postpone in order to spend important and quality time with your new team member. There's nothing worse than feeling abandoned when you arrive, ready to give your best. If you absolutely cannot clear your calendar, it's your job to ensure the person is taken care of all day and ask other managers or co-workers to take on portions of the onboarding until you can rejoin.

# STEPS TO EFFECTIVE ONBOARDING

## Send them a “What you need to know” Sheet

Let them know what they can expect or need to know as they come to their first day of work. Examples of what to include:

- Where to park
- Directions and traffic notices, for example, is there a big construction tie-up somewhere and can you offer an alternate route?
- Restaurants nearby
- Supplies on hand (i.e. do you have a kitchen onsite - fridge, microwave, etc.? Does your company provide coffee or snacks? If there are no lunch options in the area, do they need to bring their own, or bring their own coffee mug)?
- Key personnel/contact emails (especially their manager)
- Summary of organization and what each department does
- Where to get a badge, swipe card, or key if needed or where you will meet them when they arrive
- Start time on the first day
- A copy of their job description
- An agenda for their first few days

Giving a new employee a sense of what their first day will look like can significantly reduce their stress and get them excited about coming on board. This should include lunch with a manager or the CEO if possible.

If you are onboarding remote employees, some of these things may not apply, however, generating excitement, connection and structure in their employee experience is still important.

# STEPS TO EFFECTIVE ONBOARDING

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## SETTING UP WEEK 1

The first week is equally important. The more connected and useful they feel during the first week, the faster you will find them engaged and committed. The first week should be action-oriented - your new employee should be doing actual, real work right away - rather than sitting around filling out forms and reading the website. Make it exciting so they go home thinking they've just joined the best company ever!

Clarify who is responsible for which parts of their onboarding process with an associated timeline so there is no confusion that leaves the employee sitting at their desk not knowing what to do. Here are some potential items on a "week one" checklist.

### Welcome Kit

Make sure you have everything the employee needs on their first day. This should include:

- A work station/desk that is equipped and ready to go
- A computer (or other equipment) that is up to date and ready for them to log in
- Instructions for how to log in, passwords, etc.
- Uniform and/or company clothing if appropriate

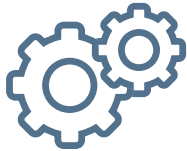
Other ideas to create a sense of welcome:

- Company swag package (mug, pen, notebooks, clothing if appropriate)
- A book for them to read - a copy of "The First 90 Days" by Michael D Watkins is a great choice that sets the stage for a successful probationary period. Or, perhaps there is another book that speaks specifically to your work culture or philosophy.
- A gift card to a local coffee shop or restaurant
- Flowers or a plant for their desk
- A treat from a local bakery

These small touches don't cost much but create a big, positive impression. What you do in the first week creates a "feeling" of how much you care about your employees. This is invaluable in building early loyalty and retention.

# STEPS TO EFFECTIVE ONBOARDING

## HR COMPONENTS



Who will deliver this element - you or your HR Department?

- Working Hours
- Benefit package
- Safety procedures and office policies
- Employee handbook, tax paperwork etc.





# STEPS TO EFFECTIVE ONBOARDING

## SUPERVISOR COMPONENT

- About the company - mission statement, values, history, company purpose, information on worker coop, etc.
- Organizational structure (chart)
- Culture conversation
- Facilities tour
- Introduction to coworkers or different departments - senior management or director should be involved
- Encourage socialization with colleagues by:
  - Setting up coffee chats and networking with other employees
  - Meeting other managers in the organization
  - Checking in with their buddy regularly with questions and concerns
- Giving them a task (i.e. have coffee/walk/lunch different departments)
  - Pair them up with an employee to check-in once a week for first month
- Ask for feedback so you can keep improving after 30, 60, 90 days

Will you have enough time to do this or should some parts be delegated to coworkers?



# STEPS TO EFFECTIVE ONBOARDING

## 3 BUILDING THE 30, 60, 90 DAY PLAN

The most important part of successful onboarding is creating a detailed 30-60-90-day plan. A template and sample are available for you at the end of this Guide. We suggest booking the dates for these reviews into your calendar during the first 2 or 3 days of the new employee's start date. Consistently performing these reviews will accomplish two things:

1 2  
3 4

Ensure your new team member is super clear about expectations for what they are supposed to learn and the metrics that will determine their move toward permanent employment



Deliver you from the “11th hour” panic when you realize you have only four days left in their probation and you have no idea whether to move them forward.

# STEPS TO EFFECTIVE ONBOARDING

## **30** Days Expectations

On the 2nd or 3rd day of employment, you will complete the 30 Day section of the form. At this point, everything is still new for the employee. It's your job to set a good foundation for success. During the first month, you should be checking in informally every few days, but a minimum of once a week more formally. Provide space for the employee to ask questions, let you know if they are struggling in any areas or need your help, or to share their successes. This allows you to be very specific around the goals and metrics for the first 30 days, as well as a checklist for all you expect the employee to be able to do/know after 30 days.

## **60** Days Expectations

Set this meeting for Day 31 of the new employee's start date. At this point, the employee should be collaborating with teams and contributing to the larger conversations. They should have a good sense of expectations and are getting familiar with their role. Using the 30-60-90 plan you'll review the employee's progress in the first 30 days and transfer any items from the checklist that did not meet the metrics into the next 30 days. Set the expectations for the last 30 days. During the second 30 days you should formally check in with the employee every two weeks but be available on a regular basis to answer questions or provide guidance. A new employee's success depends on your investment and availability.

# STEPS TO EFFECTIVE ONBOARDING

## 90 Days Expectations

Set this meeting for Day 61 after the new employee's start date. At this point, the employee should be working independently on projects and be more accountable for their work. Using the 30-60-90 plan you'll review the employee's progress in the first 60 days and transfer any items from the checklist that did not meet the metrics into the next 30 days. Set the expectations for the last 30 days and check in as often as needed, but every two weeks is reasonable.

### IMPORTANT DATE - DAY 75

This is the day by which you will determine whether the employee will successfully move through their probation or whether you will be parting ways. Don't get caught off guard by missing this important date.

**SET DAY 75  
IN YOUR CALENDAR**

JANUARY						
S	M	T	W	T	F	S
28	29	30	1	2	3	4
5	6	7	8	9	10	
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

# STEPS TO EFFECTIVE ONBOARDING

## ON DAY 75, ASK YOURSELF:

- Has the employee consistently been meeting the monthly goals and metrics?
- Is the employee a good fit with the team and your culture?
- Are there any red flags you need to pay attention to (no matter how small)? Do you have a gut feeling about their suitability?
- Do you believe this employee will successfully transition to permanent employment? If you're unsure, can you check in with another manager to get a different perspective?
- If you're uncertain, what do you need to see from the employee in the next two weeks to make this decision?
- What do you need to say to the employee about expectations at this point?

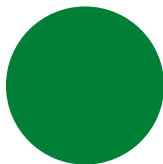
# STEPS TO EFFECTIVE ONBOARDING

## CHECK-IN ON DAY 90

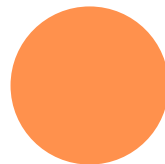
### 90 DAY MEETING

NOTE: Make sure this date does not surpass 90 days past their start date, or the employee will have transitioned to permanent employment without your permission.

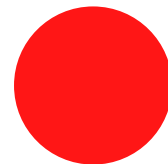
At this time, there are three possible outcomes to the probationary period:



The employee is offered your congratulations and move into a permanent position with your team, as well as provided with appropriate rewards (compensation bump, access to benefits, etc.)



You believe the job is so complex that three months is not sufficient to determine the employee's suitability. In this case you may extend the probation, BUT, with the understanding that this is an internal decision only. Employment Standards does not consider an extended probation from the employer to be a legal probationary period. If you decide to extend probation, you will be subject to paying the employee the appropriate severance according to Employment Standards if you decide to terminate employment after 90 days.



It's determine the employee is not suitable and you advise them they will not be transitioning into permanent employment and you are parting ways.

If the employee is offered the permanent position, ask the employee what they want to learn and what their long-term goals- i.e. do they want extra training in an area? It can help you identify gaps and help the employee reach their goals. This shows you care as a company and that you are investing in them personally.

# FUN ONBOARDING IDEAS

If you're looking for ways to engage new employees during their probationary period with some fun assignments and activities, here are a few ideas (most of these could be done with remote employees as well).

- Have them shadow people from different parts of the company
- Organize a scavenger hunt to meet people from different departments or online - here are a few ideas:

**Company Questions:** What is the company founder's name? Who was our first client? What are the company's values?

**Find an example of:** A satisfied customer review, an employee rocking company swag, a recent team-building activity, a team member achieving something awesome

**Find someone on the team who:** Traveled within the past year, has worked since the company started, has a side hustle, volunteers in the community

- Send out an email to the company introducing the new hire - include their interests, a fun question or a little-known fact.
- Rookie Cookie Day - bring in a box of cookies or treats from a local vendor; let your team know it's Rookie Cookie Day. In order to get their treat, employees must stop by the new employee's desk, tell the employee something interesting about themselves, and ask them a question to get to know the new team member.
- Gamify the onboarding process. Create an opportunity for the new employee to earn points by accomplishing certain tasks. The points can be translated into a gift card to a local business.
- Throw a 100th day party to celebrate the new hire's permanent position status.

# EMPLOYEE TRAINING



The probationary period is your primary opportunity to ensure adequate training is provided for the employee's success. Employees going through training need to know what they are learning, why they are doing it, and that training is supported by their manager and co-workers. Along with the 30-60-90 plan, you'll be developing a Training Plan for your new employee. **A template and sample are provided at the end of this Guide.**

Your training plan should be based on the employee's 30-60-90 Plan. You should document the activities the employee will be learning/doing in the weekly training plan. This should be reviewed with the employee weekly at first, and then twice a month, as well as alongside the 30-60-90 day meetings.



# EMPLOYEE TRAINING

## HERE ARE A FEW THINGS TO REMEMBER ABOUT TRAINING:

**Make the training as realistic as possible** - it should be relevant to the immediate and most important skills the employee needs to get to the end of their probation. Don't expect them to do so much it's impossible for them to have success.

**Make the training plan easy to follow** - it should be clear, concise and self-directed; they shouldn't have to ask you for instructions every day.

**Give constructive feedback to keep employees motivated** - all employees, but especially new team members, want to know how they are doing. They would rather receive corrective feedback early and in the moment, than find out about it at their 60-day review meeting. Don't forget to also praise work well done and affirm their progress.

**Make sure the training is adequately preparing employees to take on the job** - training should be focused not only on building specific skills required, but also on the principles they will need to adequately navigate the unexpected, make good decisions on their own, and grow their confidence to initiate, innovate, and make great suggestions.

**Vary training modalities** - to keep employees motivated, make sure you have a variety of learning methods. Seven hours of video training is exhausting and no matter how interesting the topic is, it's difficult to keep someone engaged for that length of time with the same activities. Break up reading or video learning with opportunities to "DO" job tasks, network with team members, participate in fun games, and take adequate breaks.

# EMPLOYEE TRAINING

## TRAINING PROCESS

Be aware of the new employee's job description, and skills expectations, and confidently communicate those with them.

Complete the 30-60-90 day checklists so you know before the person starts, what those metrics and milestones are.

Complete the training plan so it's ready to go to review with the new employee during their first week.

Share the training plan with everyone involved in onboarding. Let them know what they will specifically be teaching and the timelines involved. Make sure you book calendars appropriately. Share the metrics so they know the expectations and outcomes you are looking for and can support your training plan.

Check-in regularly with the employee as to how the training is going. Provide them with a copy of the training plan so they can keep it up to date for you. Let them know the best way to reach out to you when they need you (i.e. text, phone, email, time of day, etc.).

## BENEFITS AND OUTCOMES OF BEST PRACTICES – SET YOURSELF APART

This Guide has been provided to you to give you the best practices, ideas and strategies for a successful onboarding process that will engage and retain the people you bring on to your team. Don't let it overwhelm you or view it as "too much work". We are confident the time you invest in setting your new employees up for success and engagement will be well worth the effort.

Consider your employee investment "front-loaded". The time you spend at the beginning making sure you do it right, will create stronger outcomes, a higher degree of engagement and loyalty, and culture buy-in for the long term. Avoiding the work upfront, or allowing other things to take priority, will almost assuredly lead to disengagement at best, and a revolving door at worst. Employees have a lot of choice in the labour market right now, and if you're not the best company to work for, they'll be out the door looking for who is.

Creative onboarding will set you apart in the marketplace and make you an employer of choice. People will be talking about you, and this leads to attracting great talent, and keeping the talent you have. This is invaluable and necessary to stay competitive and relevant in the current tight labour market. Your ability to retain your employees will give you a competitive advantage, lead to higher productivity, create a super-engaged team, build a thriving culture and set your company on a trajectory to success.