# New Employee Onboarding Process

# What is Onboarding?

- Onboarding a strategic process of bringing a new employee to the organization and providing information, training, mentoring and coaching throughout the transition.

- The process begins at the acceptance of an offer and throughout the first six to twelve months of employment.

# Why A Strategic Onboarding Process?

- *We need to rethink how we bring new employees into UNC Charlotte* – Chancellor Dubois - 2008 Fall Convocation

- *Roughly 25% of our permanent staff have been at UNC Charlotte for two years or less and that, with expected retirements and growth, we face a growing challenge to properly orient and train hundreds of new employees* – Chancellor Dubois - 2009 Fall Convocation

# Why A Strategic Onboarding Process?

- *The relationship between the new employee and the manager is the determining factor in whether the new employee stays with an organization* – Aberdeen Group Research Co.

- *Employees will decide within 10 days if they intend to stay with the organization or begin looking for a different job* – Research by the Office of State Personnel

# New Employee Onboarding Objectives

Create a positive onboarding experience that:

- Facilitates the new employee's ability to contribute in the new role.

- Increases the new employee's comfort level in the new role.

- Reinforces his/her decision to join the university.

- Enhances productivity.

- Encourages commitment and employee engagement.

# Onboarding Process Objectives

Influence the new employee's decision to work here:

- *UNC Charlotte is my employer of choice!*
- *I am engaged in my work.*
- *I belong here.*
- *I am contributing to the success of the University.*
- *I want a long career here!*

Increase new employee retention rate

# Stages of the Process

| Stage | Definition |
|---|---|
| **Preparation** | Pre-arrival, first day thru first month activities that acclimate the new employee to the culture, team, work environment, and introduce to policies and procedures and online modules. |
| **Orientation** | HR New Employee Orientation online, classroom*, Benefits* training and department specific orientation. |
| **Integration** | Employee development planning by supervisor and employee's attendance in HR staff development training (i.e. LEAD or ASPIRE). |
| **Engagement** | Developing university awareness, building relationships, meeting performance expectations and contributing to the University's success. |
| **Follow-up** | Monitoring and measuring the effectiveness of the onboarding process. |

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# Onboarding Duration

| Stage | Duration |
|---|---|
| **Preparation** | Pre-arrival, first day thru first month |
| **Orientation** | Classroom Training (*First and Third Tuesday and Wednesday of each month – 8:30am to 4:30pm each day*), Benefits and department specific timeframes |
| **Integration** | First six months – up to probationary decision |
| **Engagement** | One to twelve months |
| **Follow-up** | 90 days and six months |

# Onboarding Process Tools

- Preparation
- Orientation
- Integration
- Engagement
- Follow-up

New Employee Onboarding Process

# Preparation

**Preparation**

**New Employee Onboarding Process**

| Tools | Description |
|---|---|
| *New* **Supervisor/ Mentor Checklist** | Provides supervisors with a step-by-step process (from pre-arrival thru the first three to six months) for bringing new employees on board to the University. Mentor assists the Supervisor in the onboarding process and serves as a mentor to the new employee |
| **NEO Online 49er Connect Modules** | Six online modules (below) are completed by the new employee prior to attending the classroom orientation.<br>•**General Information**<br>•**Welcome to the University**<br>•**Benefits and Services**<br>•**Employment Policies and Procedures**<br>•**Safety**<br>•**Time and Attendance Reporting** |
| **New New Employee Website** | Link located on the Human Resources website. |

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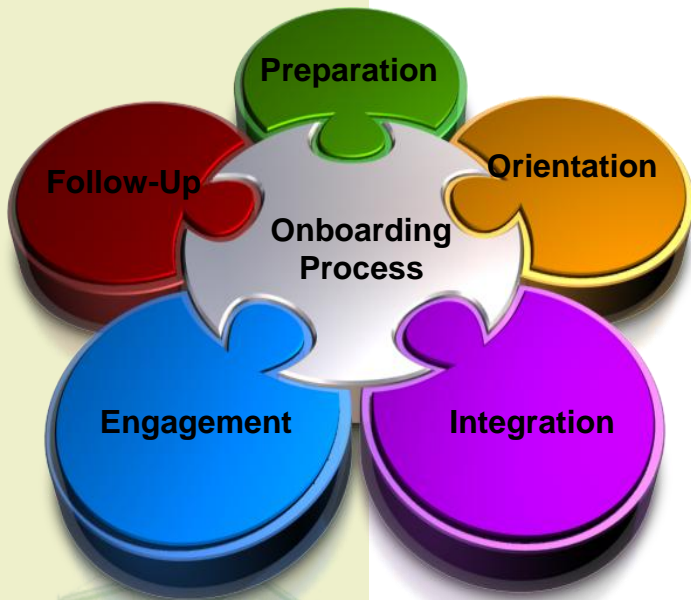
# Location of Onboarding Tools

**http://www.hr.uncc.edu/forms**

### Supervisor/Mentor Checklist

### Employee Development Plan (EDP)

Password: *supervisor*

**http://www.hr.uncc.edu/training/neo/**

### New Employee Website



Preparation

Orientation

Follow-Up

Onboarding Process

Engagement

Integration

# Supervisor/Mentor Checklist

## Why use it?

- *Guides supervisor through the onboarding process*

- *Is simple to use*

- *Can be used to integrate an existing employee (or transferred)*

- *Contains flexibility (not meant to restrict)*

- *Serves a documentation*

- *Helps with planning*

- *Promotes consistency across the organization*

# Mentor Participation

## A Mentor…

- *Is a peer employee who will help supervisors onboard the new employee.*

- *May assist in the training of the new employee.*

- *Is assigned by the supervisor.*

- *Is a positive, high performing employee (3 ≥ performance rating).*

- *Is responsible for completion of specified mentor assignments on checklist.*

# Why use it?

▶ Helps supervisor identify and plan learning opportunities and activities for supporting and developing the competencies of the new employee.

# Why use it?

▶ *Serves as a portal of information, all in one place, that is important for acclimating a new employee to the University.*

▶ *Can be used as a referral tool by the supervisor.*

▶ *Helps jump start the new employee's awareness and knowledge of the University before arriving on campus.*

# New Employee Classroom Orientation

**New Employee Onboarding Process**

Orientation

| Event | Description |
|---|---|
| **New Employee Classroom Orientation** | The HR & Benefits orientation is offered every 1st and 3rd Tuesday and Wednesday of each month. The focus of the classroom training includes: <br>•Reinforcement of key areas introduced in the online modules. <br>•Increase safety awareness at UNC Charlotte. <br>•Overview of computer support & technical training. <br>•Skill development in diversity, communications and customer service <br>•Increases understanding of university culture and history |
| **Department Orientation** | Departments specific orientations should continue as usual. |

# Integration



| Tools | Description |
|---|---|
| *New:*<br>**Employee Development Plan (EDP)** | Supervisors will use this document to identify and plan training and learning activities to meet and support the competency expectations of the new employee during the first six months to one year. |
| **Employee Learning & Development Training Catalog** | New employees can register online or by phone to participate in learning and development opportunities. |

# Engagement



| Activities | Description |
|---|---|
| **University Involvement** | •Committee involvement<br>•Volunteer opportunities (49er Family Weekend, Commencement, International Festival, etc.)<br>•Attend lectures, etc. |
| **Department Involvement** | •Lead meetings<br>•Make a presentation<br>•Take on a leadership role<br>•Holiday/Birthday celebration planning committee |
| **UNC Charlotte Community Involvement** | •Health Awareness Walks (i.e March of Dimes, RuBiRu 5K, Breast Cancer Awareness Walks) |
| **Networking/ Social Activities** | •Faculty/Staff Reception<br>•Staff Picnic<br>•UNC Charlotte Toastmasters |

# Follow-Up



| Tools/Activities | Description |
|---|---|
| *New:* **90-Day Evaluation Checklist** | An evaluation form given to new employees by HR to learn about the first three-month onboarding experience. *Measures what was done.* |
| *New:* **Six-Month Evaluation Form** | An evaluation form sent by HR to learn about the total onboarding experience. *Measures new employees' experience*. |
| **Supervisor's Probationary Decision** | Decision made by supervisor to grant new employee permanent employment status. *\*Attach Supervisor/Mentor Checklist to Probationary Form* |

**Follow-up**

**New Employee Onboarding Process**

## Why follow-up?

- *Monitor and measure the success of the onboarding process.*

- *Determine if objectives are being met.*

- *Examine what is and is not working.*

- *Uncover areas for improvement.*

# Onboarding Responsibilities

| Stage | Supervisor | New Employee | HR & Training |
|---|---|---|---|
| Preparation | • Use Supervisor /Mentor Checklist & EDP<br>• Refer to NE Website | •Visit Website<br><br>• Read First Day Checklist Info.<br><br>• Complete Online Modules/<br><br>• Use 90 Day Evaluation | • Provide Info/Coaching Sessions for Supervisors<br>• Provide Checklist, EDP and NE Website links on Supervisor's Form's Website<br>• *HR Contact – Crystal Garris @ 7-3284* |
| Orientation | • Remind new employees to attend HR class | • Attend 2-day orientation | • Offer orientation, campus tour and IT training |
| Integration | • Use EDP to develop learning plan | • Implement the activities of the EDP | • Serve as a coach in the process and use of EDP |
| Engagement | • Encourage Participation | • Participate in & get involved in campus events | • Provide opportunities for learning & engagement |
| Follow-Up | • *Include Supervisor/Mentor Checklist w/probation info.* | • Provide 90-day & 6-month feedback to HR | • Receive 90-day, 6 mo. Feedback and Supervisor/Mentor Checklist |