

July 2022

ONBOARDING



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INTRODUCTION

The purpose of this document is to provide strong, fundamental knowledge and best practices to help you design a structured onboarding program specifically to meet your needs. The key elements discussed here are aimed to offer a comprehensive framework that will allow you to set up new hires to succeed in their roles, continually ensure there is alignment of expectations throughout the first three months, and solicit valuable feedback that can help you iterate the onboarding program over time.

ONBOARDING

Onboarding is one of the most important HR functions for any organization. It is the process of acclimating your new team member to their role, to your existing team and processes, and to your organization's philosophies. When done properly, the onboarding process sets the stage for long-term alignment between the employee and the employer in expectations as well as core values. It also builds a foundation of mutual trust and confidence in the relationship.

A robust onboarding program extends far beyond the first-day introductions, office tour and welcome lunch. It should be designed to achieve 360-degree enablement so that your new team member can become effective in their new role in an efficient manner and facilitate their transition into the new role while they learn the ropes. A successful onboarding program should demonstrate your investment in your new team member's success, and leave them feeling empowered to do their best work and excited about the prospects of growing with the organization for years to come. To achieve all of this, we recommend a comprehensive 30/60/90-day onboarding program.

The 3 E's of Onboarding:

Enablement - Ensure your new hire has everything they need to be effective at their job. This can include knowledge (on the organization, programs, team structure, processes...), tools (devices, software, apps, access to drives / folders / documents...), relationships (proper introductions to the team, partners, other stakeholders...), access to additional resources, and someone to turn to for questions.

Encouragement - The onboarding process should leave your new hire feeling empowered to do their best work. This requires allowing them the time to learn the ropes at an appropriate pace for their experience level; the space to practice, make mistakes, ask questions along the way; and a gradual ramp up to more complex concepts and problems to avoid overwhelm and to help them feel emboldened by their own progress.

Expectations - Communicate your expectations of your new team member with them clearly and often. Provide context and clarity, and take the time to make sure they understand and are actually on the same page as you. Set realistic metrics and timelines to minimize ambiguity and foster accountability. Also understand their expectations of you as their manager, and make sure you're supporting them the way they need.

30/60/90-Day Onboarding Framework

Creating a robust onboarding framework for your organization will help ensure a consistent onboarding experience for all new team members and that they are provided with everything they need to succeed in the first 90 days.

The framework should serve as an easy reference and customizable action plan for your team to get all the ducks in a row in preparation for the arrival of a new hire. It

also functions as a checklist to follow throughout the new hire’s first 90 days, to ensure that everyone involved in the onboarding process (HR, IT, Finance or team members wearing those hats, along with the new team member’s direct manager) are accountable for completing the key action items within the specified timeframes.

Before the New Hire’s Start Date

Outcomes: *To create a welcoming work environment, acquaint your new hire with the existing team, prepare a fully-equipped work space (and provide them the tools to do so remotely), and let your new hire feel “settled in” on their first day.*

Action	Description	Owner
Initiate onboarding process	<i>Every onboarding needs a starting point. There should be a clear way for the organization to know it needs to prepare for the arrival of a new team member.</i>	HR
Set up onboarding presentation, training sessions, meet & greets for the employee’s first two weeks	<i>Planning ahead and putting placeholders in the calendar in advance ensures you lock in your team’s availability and lets you focus on the new team member during their first few weeks.</i>	HR
Plan the employee’s first assignment	<i>Providing the employee with short-term goals helps them find their groove and contribute immediately to the organization’s success. Start small with something they can complete within the first two weeks.</i>	Direct Manager
Assign a buddy where appropriate	<i>Designate a team member (ideally a peer on the same or an adjacent team) to help settle in the new employee for their first 3 months. This will be their go-to person for questions that they may think are “too small” to ask their manager.</i>	HR
Meet with buddy and provide suggestions / tips (if applicable)	<i>Just like a new hire, buddies need to be prepared too. Meet with the buddy in advance to discuss expectations and how they can be the most effective.</i>	Direct Manager

Prepare workstation, set up office space with supplies	<i>Part of feeling welcome in a new organization means feeling part of a team. Ensuring that a workstation is prepared and ready for them on their first day creates a good first impression.</i>	HR
Prepare office key / access card (if applicable)	<i>Ensuring that the employee has all the tools and materials they need to easily access the office when they need to create autonomy.</i>	HR
Set up technology equipment and software	<i>Ensuring that the employee has a working device, and the necessary tools / software to perform their duties means they can be effective from day one.</i>	IT
Create user accounts, ensure access is ready for first day	<i>Share all the required login details with the new employee ahead of time through their new work email. Having access to all the right networks, folders, drives, email addresses, materials, etc. will ensure they have minimal roadblocks and can focus on learning the job.</i>	IT

First Week of Work

Outcomes: *The employee feels welcomed and prepared to start working; begins to understand the position and performance expectations.*

Action	Description	Owner
Set up employee profile in HRIS and payroll	<i>Double checking proper set up in the employee systems will ensure the new hire is being properly tracked and set up for things like their probationary review and payroll.</i>	Finance / HR
Receive employee on their first day and provide tour of office if in-person	<i>The employee's first day may be either in-person or virtually. Most important is you are the first to welcome them and get them settled into their new work environment.</i>	Direct Manager
Conduct	<i>Provide an overview of the organization, its mission,</i>	Direct

orientation meeting, providing overview of the organization, key individuals and core systems	<i>purpose, organization structure, offerings, key stakeholders, etc. Ensure the new hire is aware of “who is who” and “where is where” so they can reach out to the right people when needed.</i>	Manager / HR
Introduce employee to buddy and team members through meet & greets	<i>Making friends and getting to know colleagues is likely top of mind for the new employee. Get the employee introduced to their buddy as soon as possible. And make sure they’re getting to meet the rest of the team over the next couple of weeks.</i>	Direct Manager
Welcome lunch	<i>If in-person, perhaps let them choose from the popular eats in the area. If virtually, a DoorDash/UberEats voucher can be a great gesture.</i>	Direct Manager
Clarify goals and tasks for the first few weeks, and confirm training needs	<i>A new hire will want to know how to be productive, effective, and valuable at work. Take time very early to outline expectations and goals for the first week or two so the employee has a game plan.</i>	Direct Manager
End of first week onboarding survey	<i>Gauge how they’re feeling at the end of their first week. Ensure expectations are still aligned, and course correct if there are any gaps or misalignment.</i>	HR

First Month of Work

Outcomes: *New employee builds knowledge of internal processes and performance expectations; feels settled into the new work environment; and builds a trusting relationship with you.*

Action	Description	Owner
Provide benefits overview session	<i>Set aside time to go over important details with the benefits plan in terms of offerings, deadlines, contact information, etc. Make sure they understand how to use the benefits you’re providing to them.</i>	HR

Give employee their 30-day assignment	<i>Providing something tangible that the employee can accomplish during their first month will help give them an early sense of accomplishment and value to the organization. Debrief with the employee once the assignment is completed to gauge their comfort level and identify any gaps early on.</i>	Direct Manager
Check in daily at least for the first two weeks.	<i>The first couple of weeks are very important, and you want to set employees up for success, so spend extra time checking in more regularly to ensure the employee is on the right track.</i>	Direct Manager
Introduce 30/60/90-day plan	<i>Go over the 30/60/90-day plan with your employee, explain how it is designed to help them progress gradually and set them up for success. The plan should be fluid and subject to change as needed.</i>	Direct Manager
Set expectations around communication and accountability	<i>Good partnerships are built on strong communication, aligned expectations, and a high level of trust. Give them accountability and autonomy, but set clear expectations on what success looks like.</i>	Direct Manager
Meet to set and review goals to be accomplished during probationary period	<i>Toward the end of the first month, set the stage for 60-day and 90-day goals the employee will be striving for from now to the end of their probationary period. These goals will keep them focused and motivated.</i>	Direct Manager
Get to know the employee on a more personal level	<i>Get to know the person behind the role and skill set. Learn about what sparks joy for your newest team member outside of work. What goes on in someone's personal life affects how they show up at work. Getting to know your employee as their whole self will help you grasp what work-life integration means to them.</i>	Direct Manager
End of first month onboarding survey	<i>Gauge how they're feeling at the end of their first month. Ensure expectations are still aligned, and course correct if there are any gaps or misalignment.</i>	HR

Second Month of Work

Outcomes: The employee is cognizant of their performance relative to the position and expectations, while they continue to develop, learn about the organization, and build relationships.

Action	Description	Owner
Establish and schedule regularly occurring one-on-one meetings	<i>You will now be building a regular routine with the new employee. Regular 1:1s will help build an on-going cadence for checking in.</i>	Direct Manager
Provide timely, on-going, meaningful “everyday feedback”	<i>The new hire is still learning, and will make mistakes. Don’t wait to provide valuable feedback. It should be timely and concise. Give them the knowledge to succeed.</i>	Direct Manager
Elicit feedback from the employee and be available to answer questions	<i>Keep channels of communication open. It’s not just about you providing feedback. Get insight from the employee as well about what is going well and what isn’t.</i>	Direct Manager
Assign meaningful tasks with appropriate and progressing levels of complexity; focus on tasks to be accomplished within the first 90 days	<i>It’s time to provide longer stretch goals. Provide enough meat that will guide the employee toward success during their probationary period. It will also provide you with measurable means to assess performance.</i>	Direct Manager
Continue introducing	<i>This will be organic and happen naturally through time. Take notice when these are appropriate, and when a new employee may need more context for a task.</i>	Direct Manager

employee to key people and bring them to relevant meetings and / or events		
End of second month onboarding survey	<i>Gauge how they're feeling at the end of their second month. Ensure expectations are still aligned, and course correct if there are any gaps or misalignment.</i>	HR

Third Month of Work

Outcomes: *The employee is becoming fully aware of their role and responsibilities, beginning to work independently and produce meaningful work. They feel confident and are engaged in their new role while continuing to learn.*

Action	Description	Owner
Continue having regular one-one-one meetings	<i>This should now start feeling efficient and natural. Be sure to communicate openly and determine the best way to maximize each meeting.</i>	Direct Manager
Discuss any significant employee performance challenges with HR/Leadership Team	<i>If you are having doubts about the performance of the employee and their ability to be successful, this is your last chance to decide. Discuss this early in the third month with HR or relevant senior leaders.</i>	Direct Manager
Distribute three-month probationary review forms to employee and	<i>A probationary review should be conducted and completed before the end of the third month of employment. Send the review forms at least 1-2 weeks in advance to the employee and their direct manager to complete.</i>	HR

direct manager		
Conduct three-month probationary review meeting with employee	<i>Set up a formal meeting in advance to discuss employee performance. At this point you have likely decided this person has passed their probation. Be happy to communicate this success!</i>	Direct Manager
Introduce Career Progression Framework	<i>Introduce the employee to your Career Progression Framework. Plant the seed and let them know that should they wish to advance in their career at the organization, you can create a roadmap together and they would have your support. This conversation doesn't need to go beyond letting them know what would be available to them. If the employee is ready, start planning follow-up conversations for the coming months and quarters.</i>	Direct Manager

Onboarding Plan for Your New Hire

A 30/60/90-day onboarding plan is about clearly communicating the expectations to your new team member around the specific goals they are to meet within their first three months at your organization. These goals should be designed to help them ramp up gradually, set them up for success by setting the time and pace at which they progress to the more complex aspects of their role, and ensure they don't feel overwhelmed with wanting to learn everything they need to know all at once.

When creating a 30/60/90-day plan for your new team member, start at the end and work backwards. Refer to their job description and ask yourself where you expect this new hire to be by the end of their first 90 days in terms of knowledge (about the organization, the team structure, the customers, the programs, ongoing projects, etc.); connections (their relationship with you, their immediate team, the other teams within the organization, customers, and other stakeholders); and hands-on experience in their

role (specific tasks or project-based experience and at what level), skills (specific hard and soft skills and at what level, etc.) Now break these down into three 30-day chunks starting with the basics first, and make sure that as the new employee enters each new month they will have learned what they need in order to be successful in the next 30 days (e.g. They should be well versed in X before they start learning Y.)

Below is a basic matrix including some high-level sample breakdowns as a starting point. When using this matrix, you should tailor it to the specific new team member and their role and experience level, break down each cell into SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound) goals and include more details as appropriate so as to minimize ambiguity (e.g. List all of the policies they need to read through in the first 30 days). In fact, the less experienced your new hire is, the more granular their 30/60/90-day plans should be. Review the plan with your new team member at the start of each month, get their thoughts, gauge their progress, and adjust accordingly.

	Knowledge	Connections	Experience	Skills	...
30d	<i>Get acquainted with key policies, processes and procedures</i>	<i>Get to know everyone on the team</i>	<i>Shadow 3 different team members on ongoing tasks</i>
60d	<i>Read through case studies, program files and playbooks</i>	<i>Be introduced to key stakeholders on ongoing programs</i>	<i>Contribute to 2 ongoing programs</i>
90d	<i>Form solid understanding of current market and competition for the organization</i>	<i>Participate in introductory calls with stakeholders</i>	<i>Take the lead on their first program</i>

Onboarding Surveys

Onboarding surveys are an important part of creating a great onboarding experience, particularly if you are implementing a robust onboarding program for the first time. Onboarding surveys provide a systematic way to efficiently check in on your new team member and get valuable insight about their experience at your organization so that you can continue improving your onboarding framework.

See this set of [sample onboarding survey templates](#) we designed to be used at specific points of the onboarding process: End of first week, end of first month and end of probation period.

Onboarding Best Practices

Take out the guesswork - Your new team member will want to be productive right away but may not know how. Plan out a detailed schedule for their first two weeks at a minimum, so they know exactly what they should be doing at any given time. Balance training activities with heads-down focus time and time to socialize with the team. Assign small, achievable tasks early on to help them find their groove. Be generous with resources and support so that the only thing they have left to do is crush it.

Over-communicate - Set up frequent touch points to discuss expectations, progress, challenges and anything else that comes up. Make a habit of providing more clarity and context than you think is needed, don't just assume your new hire understands you perfectly. Ask for feedback often and keep lines of communication open, especially if you're not in the same physical space.

Celebrate small wins - Make a habit of showing recognition of their contribution early on and frequently. This would be especially appreciated by new team members who are eager to impress.

Have fun - Workplace culture plays a HUGE role in employee engagement and satisfaction. Showing the fun side of your organization early and often will encourage the new team member to loosen up more quickly and feel like part of the team. Plan a social gathering with the team within the first two weeks where the different personalities can shine.

It goes both ways - As much as you expect your new hire to acclimate to your team, make sure you're also putting in the effort to get to know them. Understand their communication style, what motivates them, what management style they'd respond to, how they prefer to receive feedback, etc., and work on being the best manager you can be.