



Creating an Onboarding Plan

Once you make a new hire, it is important to continue with a thoughtful onboarding program to support employee engagement and retention. Use this guide to help you define a plan that works for you.



Employee onboarding is the process of getting your new hires familiar with not only their role and responsibilities but also the culture of your business. A well-designed employee onboarding program starts with a strong orientation (the first few days of his/her hire) and ensures your business is engaging employees to supply resources, coaching, and training so that they can become connected, successful members of the team. This process takes time and should extend well beyond your employee's first week. Successful onboarding should include three main phases and depending on your business model, the timeline will vary.

WHAT ARE THE BENEFITS?

As a business owner, your investment in employee onboarding has many benefits. It helps:

1. Improve employee retention
2. Set clear expectations
3. Create positive morale and employee engagement
4. Increase job clarity and satisfaction
5. Improve the overall performance of new hires
6. Lead to higher customer satisfaction and sales

Make sure you identify objectives for each phase:

PHASE 1 OBJECTIVE:

Employee is
Learning

Phase 1 should get your employee off on the right foot. You'll want to include activities that help an employee understand:

- ✓ Day-to-day operations
- ✓ Organizational values and policies
- ✓ The target customer
- ✓ What his/her role is and how they fit into the business
- ✓ Expectations around the workplace culture
- ✓ Resources that are available that support independent work in his/her role by the end of the month
- ✓ What they are doing well so far and what they can focus on learning more about

PHASE 2 OBJECTIVE:

Employee is Applying
What was Learned

Phase 2 should be spent on focused employee training. Team expectations and their role in that team should be made clear. You'll want include activities that help a new employee to:

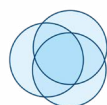
- ✓ Know what is expected in their role and how they accomplish it
- ✓ Demonstrate his/her productivity
- ✓ Start to meet your expectations
- ✓ Identify what they are doing well independently and what they may still need support on

PHASE 3 OBJECTIVE:

Employee is Working
Independently

Phase 3 should demonstrate that the employee is doing their job well, showing your company's values in their work, and needing less help from others. You'll want to see that a new employee's activities include:

- ✓ A strong motivation to meet expectations
- ✓ Requesting little to no support to accomplish tasks
- ✓ Openly receiving and offering feedback that supports a deeper understanding of their role
- ✓ Being celebrated for their good work



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Where to start?

Make sure your onboarding plan includes:

- Clear Communication: Regularly communicate expectations, goals, and progress
- Training: Provide practical and relevant training for their position
- Coaching and Support: If possible, assign a coworker as guide to answer questions
- Feedback and Recognition: Acknowledge achievements and offer constructive feedback and
- Clear Workplace Culture: Help the employee understand your business values and what it means to be a part of your team

ONBOARDING ACTIVITY PROMPTS

Use this template as a starting point to identify and document what activities are required to onboard your employees during each phase. Here are some ideas to get you started. What other ideas can you add?

- Complete an **orientation checklist**
- Welcome coffee/snack time with other staff
- Set specific job goals
- Job shadowing
- Complete training on technology/systems
- Job specific training
- Schedule supervisor check-ins
- Hold one-on-one meetings with other employees
- Have regular feedback sessions

PHASE 1 - Employee is Learning

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PHASE 2 - Employee is Applying What Was Learned

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PHASE 3 - Employee is Working Independently

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