

Onboarding Essentials

A thoughtful, robust onboarding program is critical for your new employee to fully engage in your practice. When you invest the time to develop a positive onboarding experience, you set up your new employee and your practice for success.

What is an Onboarding Program?

An onboarding program allows your new employee to become acquainted with your practice's culture, organizational structure, vision, processes, procedures, and expectations. A great onboarding program is more than just a first day orientation. It starts before the employee's first day and may continue for six months or more.

Why is an Onboarding Program Important?

An onboarding program helps to:

- Align new employees to the culture, vision, and expectations of your practice.
- Make new employees feel an immediate sense of value and contribution.
- Build connections and relationships with the team.
- Provide positive experiences and impressions of your practice.
- Decrease turnover by engaging employees early.

Building a Fully Engaged Team

Onboarding Essentials

Four Components of an Onboarding Program

There are four key components to creating a successful onboarding program: expectations, contributions, relationships, and support. When you create your onboarding program, think of experiences and activities that will support these components.

Expectations

New employees must clearly understand the behaviors, actions, and attitudes that are needed to be successful in your practice. During the onboarding process, start by communicating your expectations, but also give your new hire an opportunity to share their expectations in this role.

Contributions

Utilize your new employee's contributions, strengths, feedback, and interests to develop a more productive and efficient team, which results in a more successful practice.

Relationships

Relationships and relationship building are essential during onboarding. Your onboarding program should move beyond basic introductions. Offer experiences for the new employee to create and build authentic relationships with their team members.

Support

For the first several months on the job, offer continuous support to your new employee. Help them meet expectations, utilize their contributions, build relationships, and smoothly integrate into the team.

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Onboarding Checklist Template

An onboarding checklist can be helpful in maintaining an organized and effective onboarding program. The *Onboarding Checklist Template* on pages 4-8 offers suggested activities to complete before the employee starts through their first six months of employment. There is also blank space where you can insert onboarding activities that are specific to your practice. Remember to focus on activities that address expectations, contributions, relationships, and support.

In addition to you and your new employee, you may want to include other team members in the onboarding process. Make sure that any team member who is involved understands the activity, their role, and the timeline for the activity. The *Onboarding Checklist Template* includes a column to list the responsible person(s) for each activity.

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Prior to First Day of Employment

Activity	Responsible Person(s)
<p>1 week prior, send information for their first work day and any required paperwork including:</p> <ul style="list-style-type: none"> • Start time • Who to ask for upon arrival • Dress code • When and where they will be eating lunch • End time • What they need to bring 	
<p>2-3 days prior, the direct supervisor calls the employee to confirm start details, answer any questions, and exchange contact information in case the new employee needs to get in touch prior to arrival on their first day.</p>	
<p>Set up the employee's workstation with supplies, useful documents, and any other welcome materials.</p>	
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First Day of Employment

Activity	Responsible Person(s)
Introduce the employee to all staff members.	
Give a tour of the practice.	
Review the practice's policies and procedures.	
Ensure the employee has access to all necessary systems (computer, time keeping, building access, etc.).	
Review the schedule for the first week.	
Take the employee to lunch.	
Assign a mentor (manager, team leader, or peer).	
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First Week of Employment

By the end of the first week:

Activity	Responsible Person(s)
<p>Have a conversation about expectations. Record key discussion points.</p> <ul style="list-style-type: none">• Discuss what you want the employee to do to learn, grow, and contribute to the practice.• Let the employee share their expectations for this role, interactions with the team, and responsibilities for the future.	
<p>At the end of the first week, ask the employee:</p> <ul style="list-style-type: none">• What have been the best experiences for you during the first week?• What areas are you concerned about or still need support?• How are you getting along with the team?	
<p>Provide at least one opportunity for the employee to socialize with various team members (lunches, dinners, coffees, after-hours events, etc.).</p>	
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First Month of Employment

By the end of the first month:

Activity	Responsible Person(s)
<p>Create a cross training program that helps the employee:</p> <ul style="list-style-type: none"> • learn new skillsets • understand a variety of roles in the practice • learn how different groups interact • build relationships 	
<p>Ask the employee for their input and observations on how the team can work better together and how the practice can improve.</p>	
<p>Review the expectations that were established during the first week. Ask the employee if expectations are not being met.</p>	
<p>Provide additional opportunities for the employee to socialize with various team members (lunches, dinners, coffees, after-hours events, etc.).</p>	
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Six Months of Employment

By the end of six months:

Activity	Responsible Person(s)
<p>Meet with the employee to ask:</p> <ul style="list-style-type: none"> • What have been the best experiences for you during the first six months? • What areas are you concerned about or still need support? • How are you getting along with the team? 	
<p>Meet with the employee's mentor to discuss performance.</p>	
<p>Review the expectations that were established during the first week. Discuss with the employee if these expectations need to be changed or revised.</p>	
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