NEW LEADER ONBOARDING GUIDE

Welcome to Campus Services!

New Leader Onboarding Guide

WELCOME TO CAMPUS SERVICES!

INTRODUCTION

Welcome to Emory University – Campus Services! We are pleased to welcome you as part of the Campus Services Leadership team. This guide is intended to provide you with useful information and resources to assist you in making a successful transition.

WHAT IS ONBOARDING?

Onboarding, including orientation, begins with the first day of employment and usually ends upon the first year of employment. It is a process that gets employees up to speed with the policies, procedures, culture, expectations, and day-to-day responsibilities of their department/unit.

We have adopted this process in Campus Services to:

- Ensure you feel welcomed
- Build relationships with key stakeholders
- Increase engagement and satisfaction
- Reduce the time it takes to "hit the ground running"

WHAT IS THE DIFFERENCE BETWEEN ORIENTATION AND ONBOARDING?

The following table outlines the differences:

ORIENTATION	ONBOARDING
- Is typically a 1 day event - Focuses on organization's structure, mission and policies - Includes a review of the Employee handbook - Completion of payroll and benefits paperwork - Other administrative issues	- Extends well beyond the 1st few days - Is a systematic process - Can last from 3 to 18 months depending on the position - Cultivates long term relationship building and access to information - Promotes better understanding of the culture, mission and goals - Fosters a feeling of belonging and affirmation of making a right choice - Reduces the time it takes to "hit the ground running"

While the components of a traditional orientation program still apply, they now become a "part" or "stage" of a much more comprehensive Onboarding process.

Whereas, most orientation programs conclude by the end of the first or second month on the new job, onboarding begins the first day and continues well beyond the conclusion of the orientation program.

WHY IS ONBOARDING IMPORTANT?

Statistics show that employees are most vulnerable to leave an organization during the first 18 months after they are hired. Making a good impression is therefore paramount.

Effective employee Onboarding serves five interrelated purposes:

1. It builds Emory University's REPUTATION for being a thoughtful employer, with great training, clear leadership, and strong structure.
2. It helps RETAIN staff members.
3. It REDUCES high turnover costs.
4. It gets new employees to efficient PRODUCTIVITY levels quickly.
5. It builds a COHESIVE TEAM, therefore raising EVERYONE'S productivity.

WHOSE RESPONSBILITY IS ONBOARDING?

Onboarding is successful only when Campus Services-Human Resources (CS-HR)/Training and Communications (T&C) and the hiring manager are all actively involved. The goal of this partnership is to establish a long-term relationship with the employee that begins as soon as the employee comes onboard.

While CS-HR/T&C plays a key role in the early recruitment and orientation and in guiding the Onboarding process, the hiring manager must be proactive and engaged in facilitating the employee's successful integration into the organization over time.

ONBOARDING PROGRAM IN CAMPUS SERVICES

You will be oriented to the policies, culture, expectations through a series of learning events including:

- A comprehensive New Leader Onboarding checklist
- Opportunities to engage in one-on-one meetings with key contacts
- An assigned new hire coach
- Professional development training sessions
- Regularly scheduled meetings with your Leader

PROGRAM COMPONENTS

The New Leader Onboarding Program is broken down into five phases with key activities over the course of 1 year:

Phase 1: First Day/First Week

Phase 2: 1st month (30 days)

Phase 3: 2nd month (60 days)

Phase 4: 3rd month (90 days)

Phase 5: remainder of 1st year of employment

ROLES & RESPONSIBILITIES

New Hire

- Uses the New Leader Checklist and supporting resources to manage the process
- Engages with the hiring manager at the defined times during the process
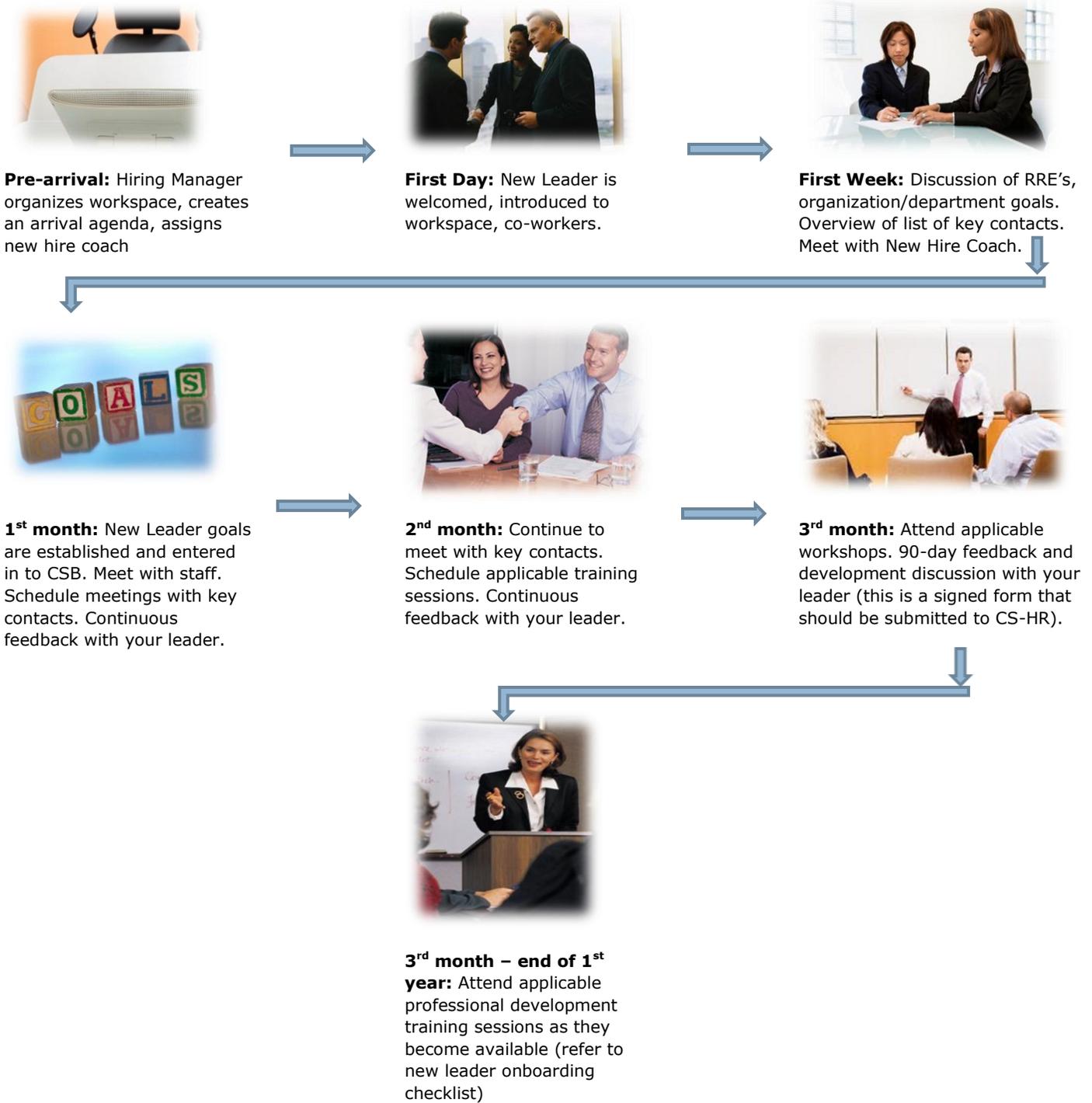- Completes all New Leader Learning Sessions

Hiring Manager

- Provides direction, coaching and feedback while building knowledge and helping establish key relationships
- Use the New Leader Checklist and supporting resources to facilitate a smooth transition for the new hire
- Assigns a new hire coach
- Reserves time to communicate with the New Leader

CS Human Resources/Training & Communications

- Overall process owner
- Serves as advisor to walk/talk through Onboarding and transitioning challenges
- Gathers feedback and evaluates the program on an ongoing basis

PROCESS CHART FOR ONBOARDING A NEW LEADER IN CAMPUS SERVICES

Pre-arrival: Hiring Manager organizes workspace, creates an arrival agenda, assigns new hire coach

First Day: New Leader is welcomed, introduced to workspace, co-workers.

First Week: Discussion of RRE's, organization/department goals. Overview of list of key contacts. Meet with New Hire Coach.

1st month: New Leader goals are established and entered in to CSB. Meet with staff. Schedule meetings with key contacts. Continuous feedback with your leader.

2nd month: Continue to meet with key contacts. Schedule applicable training sessions. Continuous feedback with your leader.

3rd month: Attend applicable workshops. 90-day feedback and development discussion with your leader (this is a signed form that should be submitted to CS-HR).

3rd month – end of 1st year: Attend applicable professional development training sessions as they become available (refer to new leader onboarding checklist)

TIPS ON MAKING YOUR FIRST 90 DAYS SUCCESSFUL

Starting a new job with leadership responsibilities can be extremely exciting and invigorating. You have spent time researching, preparing for the interview and possibly negotiating your compensation. Your next step is to give some thought to what you're going to be doing during the first 90 days on the job as it has great practical and symbolic importance. The first 90 days offers a unique window of opportunity to establish relationships, set a tone and identify expectations.

The following section provides a few tips on how you can ensure your transition within the first 90 days is a smooth one.

NEW LEADER ONBOARDING CHECKLIST

The purpose of the New Leader Onboarding Checklist is a "to do" list with critical elements, resources, and learning sessions that should be completed within the first day, first week, and first 30, 60 and 90 days. The intent of this document is one of a collaborative approach between you and your leader. (Refer to the New Leader Onboarding Checklist provided).

PLANNING FOR IMPORTANT CONVERSATIONS

Your relationship with your leader will be built through a continuing dialogue. Your discussions will begin before you accept the new position and continue into your transition and beyond. To help you make a smooth transition, there are some important conversations that will help you engage with your leader.

1. **Roles, Responsibilities, Expectations (RREs) & Goals:**
   a. Your agenda for this conversation is to understand your responsibilities and what expectations your leader has of your position. What does your manager need you to do in the short and medium term?
   b. As a part of the Campus Services Feedback and Development Process, your RRE's are translated into goals. These goals are loaded into the online performance management tool (CSB). What does success look like? How will your performance be measured?

2. **Communication Style:** This conversation is about how you and your manager interact on an ongoing basis. Is it face-to-face? In writing? By voicemail or e-mail? How do your styles differ and how will you negotiate those differences?

3. **Resources:** This conversation is a negotiation of resources. What is it that you need to be successful? What do you need from your leader? This may not always be physical resources but rather, help from your leader to persuade the organization to confront the need for change.

4. **Professional Development** (this conversation should occur after the 1ˢᵗ 6 months of employment): Discuss how your tenure in this job will contribute to your professional development. Are there projects that you can undertake? Are there courses or programs to further develop your skills?

BELONGING AND FEELING CONNECTED

Your leader or designate will provide you with a list of key contacts/stakeholders/staff members for you to meet within your first 90 days of your Onboarding Program. Start by meeting with your direct reports as a group and one-on-one and then meeting with key contacts. You will need to decide in what order you will meet with them. Be careful to avoid being excessively influenced by what the first couple of people say to you. One approach is to keep the same "script" in all your meetings. The format might consist of brief opening remarks about yourself and your approach, followed by questions about the other person and then a standard set of questions about the business. The following are suggested questions:

1. What are the biggest challenges the department is facing (or will face) in the near future?
2. Why is the department facing these challenges?
3. What are the most promising opportunities for growth?
4. What would need to happen for the organization to develop these opportunities?
5. If you were me, what would you focus your attention on?

Asking these questions will assist you in identifying prevalent and divergent views. You will learn about substance and team dynamics and begin to identify key issues.

UNDERSTANDING THE ROLE OF A NEW HIRE COACH

Responsibilities of New Hire Coach:

- To help welcome the new leader to Campus Services
- Be an informational resource for the new leader by answering general questions regarding day-to-day aspects of working in Campus Services
- Help in the socialization process by introducing you to key individuals and groups
- Be a resource for work rules, and workplace culture and norms
- Maintain confidentiality as appropriate

SELECTION OF A NEW HIRE COACH

New Hire Coaches are selected by the hiring manager of the new leader. The following qualities are preferred when selecting a new hire coach:

- Has patience and effective communication skills
- Demonstrates strong work performance
- Exemplifies Campus Services Core Competencies: Building Trust, Customer Focus, Effective Communication, and Leveraging Diversity
- Works in the same department and/or has similar role
- Can devote the time to be accessible to the new leader
- Shows interest in being a new hire coach

QUESTIONS FOR A NEW HIRE COACH

The following is a list of types of questions that a new hire coach should be able to answer or to assist with finding the answers:

Getting Started

- Where do I find…?
- What resources are available to help with…?
- Who would I contact for information about…?

Day-to-Day Work Tasks

- How do I…?
- What is the process for…?
- Where do I get help with completing…?
- What do you think about…?
- Would you be able to show me…?
- Could you help me with…?

Understanding the Work Environment

- Are there certain events or meetings that I should attend?
- What has proven successful in the past?
- What's the protocol on…?
- Who do you think would support me on…?

CONTINUOUS FEEDBACK AND COMMUNICATION

Effective Onboarding means keeping in touch with your leader as you become more familiar with the organization. It also means actively finding out how you're doing and making it easy to discuss what's on your mind. It is recommended to have weekly or bi-weekly "check-in" meetings with your leader.

FEEDBACK AND DEVELOPMENT MODEL

REFERENCES

The First 90 Days: Critical Success Strategies for New Leaders at All Levels by Michael Watkins (2002)

Right From The Start: Taking Charge In A New Leadership Role by Dan Ciampa and Michael Watkins (1999)

University of California, Davis http://www.hr.ucdavis.edu/sdps

University of Delaware http://www.udel.edu/onboarding/

York University www.yorku.ca/hr/hrlearn.html