

# Supervisor's Guide to Onboarding a New Employee



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## Using this Guide

The Supervisor's Guide to Onboarding a New Employee does just that – it guides you through the first months of your new employee's employment, providing instructions to complete certain actions that will help them succeed. **The culmination of these is a series of meetings with you.**

The onboarding process is divided into five phases, and within each phase, you – as the supervisor – also have actions you should complete.

The more you can do up front to prepare, the more successful you and your new employee will be.

### **There is a pattern within each phase:**

- **Review** what the new employee has accomplished to date.
- **Do** a list of actions.
- **Discuss** critical topics with the new employee.
- **Plan** for the next phase.

**Important Note:** Every employee and situation is different. The information covered – as well as the timeline – is important, but you have the final decision on whether to cover everything exactly as prescribed.

### **Supervisor Support**

In this process, you may feel an increased level of responsibility, but you also have an increased level of support. Human Resources is available to help support you and answer questions by contacting [humanresources@missouriwestern.edu](mailto:humanresources@missouriwestern.edu) or 816-271-4587.

# Guiding Principles

**Definition:** Onboarding is the process through which new employees acquire additional knowledge, skills, relationships and behaviors to become effective organizational members with higher job satisfaction, better job performance and greater organizational commitment.

- 1. Employee onboarding should facilitate a smooth transition for both the employee and the organization while optimizing employee longevity, creativity and productivity.** Onboarding programs create opportunities to support and empower new hires, rather than leave them to chance.
- 2. Onboarding new employees is a process that takes time (6-12 months).** It is not a singular event and must extend beyond the typical one-day orientation program. Onboarding needs to be structured with clear goals and utilize a variety of methods and tactics, which will help ensure that all employees, including those from diverse backgrounds, can be equally successful.
- 3. Onboarding requires a commitment from EVERYONE.** While Human Resources drives a portion of onboarding, supervisors, administrators, faculty and staff all have roles to play in the success of new employees. While orientation at the unit level is the most important part of the onboarding process, orientation to other units should also be included.
- 4. Supervisors play the most important role in employee onboarding.** New employees' relationships with their managers are often the most significant relationships in their work lives. When managers take the time to create strong onboarding practices and meet with new employees frequently, employee productivity, retention and loyalty is higher than for those who do not take the time.
- 5. Onboarding programs should be proactive and anticipate the needs of new employees in a thoughtful progression.** Onboarding processes should seek to balance administrative, learning and work activities with socialization and networking opportunities.

# The Employee Onboarding Process

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Integrating into a new job and environment takes time. To ensure a seamless integration, onboarding has been divided into five phases:

Phase	Objective	Sample New Employee Activities
I. Preparing for the first day	Creates the new employee's first impression. Prepares them for employment and completes administrative requirements.	<ul style="list-style-type: none"> <li>• Completes administrative forms.</li> <li>• Receives welcome email from Human Resources.</li> <li>• Receives welcome call from supervisor.</li> <li>• Prepares for the first day.</li> </ul>
II. First day	Welcome the employee! A day of discovery, administration and introductions.	<ul style="list-style-type: none"> <li>• Meets with Human Resources to complete new-hire paperwork (if not done before the first day).</li> <li>• Attends Employee Orientation from Human Resources.</li> <li>• Meets with the supervisor.</li> </ul>
III. First week	Helps the employee get acquainted with the University and with their new role(s).	<ul style="list-style-type: none"> <li>• Shadows a colleague and on-the-job training.</li> <li>• Meets with the supervisor.</li> <li>• Tours department.</li> </ul>
IV. First month	The employee becomes a productive member of the Missouri Western State University family.	<ul style="list-style-type: none"> <li>• Immerses in University culture, services, etc.</li> <li>• Meets with the supervisor and creates a development plan.</li> </ul>
V. Future actions	Onboarding is an ongoing learning process.	<ul style="list-style-type: none"> <li>• Attends any formal or virtual training.</li> <li>• Holds a check-in meeting with the supervisor at least twice a month.</li> <li>• 30-60-90 day evaluation.</li> </ul>

## Your Role and Others

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Role	Responsibilities
Supervisor, Department Orientation Contact, or Designated Trainer.	<ul style="list-style-type: none"> <li>● Preparing workspace</li> <li>● Introduction to colleagues</li> <li>● Departmental procedures</li> <li>● Job expectations</li> <li>● Job-specific training</li> <li>● Ensuring attendance in Employee Orientation Program</li> <li>● Evaluation process</li> </ul>
Human Resources	<ul style="list-style-type: none"> <li>● Administrative Information</li> <li>● Compliance</li> <li>● Benefits</li> <li>● University processes</li> <li>● Legal</li> <li>● Administration of Employee Orientation Program</li> </ul>

### Should You Choose A Department Orientation Contact or Designated Trainer?

You may choose to have an Orientation Contact or Designated Trainer. This person you choose will help orient the new employee and be a “go to” person when you are unavailable, while assisting in the many tasks needed to prepare and onboard a new employee.

*A few tips:*

- Choose someone knowledgeable, but also eager and patient.
- It’s best to delegate, but not completely disassociate yourself from the process.
- You decide how to split up tasks between you and your department contact.
- Include this new role into the department contact’s performance evaluation.

## Phase I: Preparing for Your Employee's First Day

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Now that you're expecting a new employee, planning for their arrival is critical. A new employee looks for immediate confirmation that joining was the right decision.

### Do:

- Complete the New Employee Checklist. (Appx. J)
- Create a list of Job- and Department-Specific Learning Activities. (Appxs. A & B)
- Review the new employee's job description to remind you of the required skills of the position and the strengths of the new employee.
- Send an email to your department (or make an announcement in a staff meeting) with information about the new employee. Provide background of the person's skills and experience, as well as start date and agenda. Preferably 2-3 days in advance.
- Create a folder for the new employee where you can keep specific information to give them, as well as information about them.
- Review Missouri Western policies and benefits; they may have changed since you last hired someone. Schedule time with Human Resources to review, if necessary.
- Gather all historical information from the predecessor (if possible), such as best practices, files, records and metrics to pass along to the new employee.

### Discuss:

- Call and welcome the new employee. Convey how excited you are for their arrival and answer any questions.

## Phase II: Your New Employee's First Day

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It's not the time to overwhelm a new employee, but they are excited to get started. Don't assume your new employee will come in perfect and know everything. You hired the *best person* for the job, but that person still needs guidance.

### Review what's occurred:

- Confirm all activities from Phase I have been completed successfully.

### Do:

- Upon arriving, ensure the new employee has completed all paperwork Human Resources needs for employment.
- Ensure employee knows information about Employee Orientation. This is held on the first day; information was sent via email to the employee and supervisor.
- Introduce new employee to Orientation Contact/Trainer (if applicable) and other team members.
- Secure additional items a new employee will need.

### Discuss:

- Conduct first-day meetings with new employees during Lunch with the Leader portion of Employee Orientation. (Appx. C)

### Plan for Next Phase - Week One:

- Determine the Job- and Department-Specific Learning Activities the new employee will complete during the first week. (Appxs. A & B)

## Phase III: Your New Employee's First Week

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During the first week, the new employee is most likely not yet confident, but should be more familiar with their role and the University. Believe it or not, many new employees complain their first week is boring, so check in with them often.

### Review what's occurred:

- At the end of the first week, confirm the new employee has shadowed a designated colleague and department orientation is complete. (Appx. E)

### Do:

- Check in often with new employee – don't wait for the new employee to come to you. (They generally will not for fear of looking incompetent.)
- Begin inviting the new employee to key meetings.
- Create opportunities for the new employee to interact with other employees and understand University culture.
- Encourage other colleagues to invite the new employee to partake in campus activities.
- If the new employee has direct reports, set up meetings with them and their support staff.
- Schedule one-on-one meetings for the new employee to meet with departmental and other colleagues they will be working closely with. These meetings can occur throughout the first month.
- Invite the new employee to join you for lunch. Invite other team members, and reinforce the message that the new employee's contribution will be appreciated.

### Discuss:

- Conduct a first-week meeting with the new employee. (Appx. D)

Plan for Next Phase - Month One:

- ❑ Determine the Job- and Department-Specific Learning Activities the new employee will complete during the first month. (Appxs. A & B)

## Phase IV: Your New Employee's First Month

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The new employee should be feeling more comfortable now and ready to take on more responsibility; they are eager to demonstrate that you made the right hiring decision.

### Do:

- Continue to check in at least once a week; encourage the new employee to share any frustrations.
  - Tip: A check-in can occur in person or over the phone if you are traveling.
- Begin to create a development plan for the new employee. (Appx. G)

### Discuss:

- Conduct a first-month meeting with the new employee. (Appx. F)

### Plan for Next Phase - Future Actions:

- Determine the Job- and Department-Specific Learning Activities the new employee will complete in the future. (Appxs. A & B)

## Phase V: Your New Employee's Future Actions

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Your new employee's orientation and learning does not end after the first month.

### Review what's occurred:

- Discuss the employee's feedback on Employee Orientation

### Do:

- Continue to check in at least once a week; encourage the new employee to share any frustrations.
  - Tip: A check-in can occur in person or over the phone if you are traveling.

### Discuss:

- Conduct a formal check-in meeting with the new employee. (Appx. I)

# APPENDICES

## Appendix A: New Employee Job- and Department-Specific Learning Activities

There are three broad categories of information a new employee needs:

1. Generic information about the University and for all employees
2. Department-Specific information
3. Job-Specific information

*Generic* information is accounted for in the University-wide Employee Orientation.

*Department-Specific* and *Job-Specific* information is your responsibility. How you convey this information is up to you and can take many forms:

- Shadowing a colleague in your department
- Meeting colleagues in other departments with whom they will work closely
- Manuals and other documented instructions and procedures
- Coaching session conducted by you or others
- Formal training, either classroom or online

Use the worksheet on the next page to aid you in developing a list of Job- and Department-Specific Learning Activities **that the new employee will complete over time.**

Note: You will be referring back to this worksheet often throughout your new employee's onboarding.

## Appendix B: Job- and Department-Specific Learning Activities

Create a list of activities a new employee should complete to learn about the department and job. Some common activities have been populated for you.

When	Activity	Who	Materials
Day One	Review job description	Supervisor	Job description
Day One	Department orientation	Supervisor and/or Dept. Orientation Contact	
Day One			
Week One	Shadow a colleague in your department		
Week One	Review manuals and other documented procedures		
Week One			
Week One			
Month One	Employee development plan		
Month One			
Future Actions	Supervisory training		
Future Actions			

## Appendix C: First-Day Meeting with New Employee

Each supervisor approaches a new employee's first day slightly differently, but the goal is to welcome the new employee and provide them with information to get started.

During your first meeting with the new employee, discuss the following:

- Review job description. Explain specific responsibilities and evaluation format and process (as applicable).
- Your expectations. Explain in what ways they'll be expected to contribute.
- Provide names of team members and department organizational chart.
- Provide other materials you have collected in the new employee's folder.
- The department's customers and who supports the department.
- The new employee's work hours, the department's office hours, lunch hour, break times and overtime policy/procedure (if applicable).
- Departmental dress code and any other department-specific policies.
- Who to contact when ill or late reporting to work, including necessary forms.
- Emergency procedures, emergency exits, storm-safe areas.
- The new employee's schedule of activities for week one, including:
  - Job- and Department-Specific Learning Activities (see chart in Appx. B).
- Your schedule for the week and the best time to reach you for questions.
- Any additional questions the employee might have.

*Tip:* New employees are generally willing to try different behaviors as they adapt to their new environment. The first week, therefore, is a perfect opportunity to provide employees with a clear understanding of productivity, quality and behavior.

## Appendix D: First-Week Meeting with New Employee

Near the end of the first week, meet with the new employee to discuss the following:

- Feedback from the shadowing session with department colleague(s).
- Your initial (informal) feedback on the new employee's performance to date.
  - Tip: It's never too early to provide feedback. Until then, a new employee is uncertain of their actions.
- The new employee's feedback on their direct reports (if applicable).
- The department's staff meeting schedule (if applicable).
- The process for the new employee to request time off.
- The travel and expense reimbursement process (if applicable).
- Foreseeable challenges the new employee may encounter and how to overcome them.
- Your communication style – whether you prefer email versus phone, an open door versus scheduled meetings, etc. – and how your styles can work together.
- Your approach to time management, and what the new employee can do to make good use of their time.
- The new employee's schedule of activities for month one, including:
  - Application training dates
  - Job- and Department-Specific Learning Activities from chart
- Your schedule for the month and best time and method to reach you.
- Any additional questions the employee might have.

## Appendix E: Department Orientation

In the first week, a new employee will need:

- Employee workspace:
  - Phone
  - Business card
  - Personal computer (if applicable)
  - Workspace
  - Supplies
  - Name badge
  - Access to printer
  
- Department tour:
  - Location of break rooms and restrooms
  
- Instructions for communication tools:
  - Use of [office telephone](#) – advanced features
  - Setting up voicemail and the recommended outgoing greeting (if applicable).
  - Use of fax machine, printers, copy machines and other devices
  
- Other items as instructed by supervisor
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  - \_\_\_\_\_
  - \_\_\_\_\_

## Appendix F: First-Month Meeting with New Employee

Toward the end of the first month, meet with the new employee to discuss the following:

- How you feel the employee is performing. Use “How am I Doing?” worksheet (Appx. H).
- What is most important to you as far as your new employee’s work objectives?
- Missouri Western and the department’s strategic plans, as well as key initiatives in your area.
- The core elements of a performance evaluation:
  - The department’s performance evaluation process and cycle, and the criteria and evaluation form that will be used to evaluate the new employee’s performance.
- The new employee’s career goals:
  - Create a development plan. (Appx. G)
- What the new employee should do if they have conflict with another employee.
- New ideas the employee may have. Give them a chance to integrate, and then capture their ideas NOW. Don’t wait until they forget what they did at their old job and become too much a part of the system.
- The new employee’s schedule of activities for the future, including:
  - Applicable training dates.
  - Job- and Department-Specific Learning Activities from chart.
- Any additional questions the employee might have.

## Appendix G: New Employee Training and Development Plan

Your new employee's training and development can take on many shapes and forms, from:

- Informal on-the-job training
- Formal classroom and online training
- University-sponsored education opportunities.

Even if it is informal, you and your employee should create a development plan by:

- Breaking down your new employee's job by task and necessary skills.
- Determining how well developed their skills are.
- Creating a development plan, including milestones, to help address development.

## Appendix H: How Am I Doing?

Although you and your new employee will have regular performance discussions, and their performance will be formally reviewed on an annual basis, it's good to periodically provide input regarding how you feel they are performing.

Your first impression of the new employee:

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How you feel about the new employee's performance to date:

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New employee's strengths:

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New employee's areas for improvement:

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Action steps new employee can take to improve (books, training, etc.):

1. 

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2. 

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3. 

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## Appendix I: Check-In Meeting

A check-in meeting is designed to quickly identify and address issues. An employee problem usually becomes unsolvable when it goes on for too long without intervention.

Tip: Don't schedule it too soon. Allow the employee a chance to formulate opinions, questions and concerns.

During it, you should probe:

- Does the new employee adequately understand their role?
- Is this job what they expected?
  - If the job is not what was expected, what can be done?
- What ideas does the new employee have to improve the department and/or University?
- Is the new employee having trouble fitting in or having difficulty with another employee or department?
  - What can be done to resolve it?
- Does the new employee see a career path?
  - How can you help that materialize?

## Appendix J: Missouri Western State University New Employee Onboarding Checklist

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The following checklist provides a structure for giving a new employee their first detailed view of the workplace. Once all items have been discussed and the checklist completed, the supervisor can be reasonably assured that the employee has received important information needed to be successful on the job.

Each supervisor is responsible for the completion of the checklist. Supervisors have flexibility to decide the best way for the new employee to receive the required information.

As each activity is completed, check the relevant box and indicate the date. At the end of the department onboarding, your signature coupled with the employee's signature will verify completion of the process. The document can then be scanned and emailed to [humanresources@missouriwestern.edu](mailto:humanresources@missouriwestern.edu) to be inputted into the employee's personnel file.

### **Helpful Information**

- Contact the Help Desk for anything related to Technology Services (e.g. computer or phone) at 816-271-4555 or submit a [MOJO](#) ticket.
- All forms needed to complete a request in this checklist can be found online at the Missouri Western website in the A-Z index under "[Forms – employee.](#)"
- If you have any questions about new employee onboarding, please contact Human Resources for guidance at 816-271-4587.

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**New Employee Name:**

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**Supervisor Name:**

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**Hiring Department:**

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- Pre-Employment Review (Complete prior to first day of work)**
  - Obtain the official start date of the new employee from Human Resources.
  - Request keys from Physical Plant
    - [Submit a Key Request Form](#)
  - Order Business Cards.
    - [Submit Business Card Form](#)

- Request the following from Technology Services (if applicable):
  - Access to Banner
    - [Submit Banner INB Request Form](#)
    - Submit [MOJO](#) ticket for the following:
      - Telephone set up for new user
      - Set up a new device for new user (computer & programming)
- Request the following from Marketing & Communications (if applicable):
  - Submit [MOJO](#) ticket for the following:
    - Name Badge Request
    - Nameplate Request
  - Provide employee information on how to [register](#) for a parking permit via online application.
  - Email new employee departmental information.
- First Week of Work (An introduction to the work environment)**
  - Welcome Employee – Introduce yourself.
  - Ensure employee is set up for success for Employee Orientation administered by Human Resources:
    - Provide all necessary supplies (if applicable)
    - Have lunch with new employee(s) with the “Lunch with Leader” section of Employee Orientation held at 12 p.m. in the Dining Hall in Blum Union.
  - Provide department and building tours.
  - Departmental Onboarding
    - Complete “First Week Employee Meeting” (Appx. D)
    - Complete “Department Orientation” (Appx. E)
    - Schedule new employee with [Purchasing](#) for the following (if applicable):
      - Procurement Card access and training
      - Expense reports training
      - Reimbursement procedures and training
    - Schedule new employee with the Director of Budgets for the following (if applicable):
      - Budget overview access and training

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 Supervisor Signature and Date

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 Employee Signature and Date