

APMA Presentation - Onboarding - A Key Factor in Ensuring Company Compliance and Employee Success

Presentation by:

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Why is this Important?

The time, cost and energy spent sourcing, finding, and training the right candidates, is enormously cumbersome and expensive, and when you are recruiting, you want to find the right people and have them stay!



Problems with Recruiting and Hiring

- Long hours sourcing candidates
- More hours reviewing and scrutinizing resumes
- Wasted time meeting the wrong candidates
- Scarcity of talent, labor
- Competing with other companies for the same candidates
- Finding the right fit
- Candidates in your companies salary range
- Solid background and reference checks
- Putting a hold on recruiting while you wait for the candidate who may cancel
- Waiting for the new-hire to start
- Orchestrating all the logistics prior to their start date

Defining Orientation vs. Onboarding

Defining Orientation vs. Onboarding

Orientation is the HR welcome to the organization. A critical, yet not the most exciting, part of the hiring process.

Onboarding is the process of integrating employees into their new work environment. It is the final, yet ongoing crucial stage of the recruitment process. It is an extension of the first day orientation and one of the most important steps in retention

Getting it right here is essential!

Pre-Hiring

Activities Pre-Hiring

- Hiring starts long before finding the right candidate
 - Understand the position, the need for the position
 - Does the manager understand the position? Do they have an onboarding plan? Training plan?
 - Is there a budget for this role?
 - Job descriptions
 - Interviewing
 - Interview questions
 - Who's interviewing?
 - Salary alignment
 - Growth and development potential

**WE'RE
HIRING!**

Communication Before Day 1

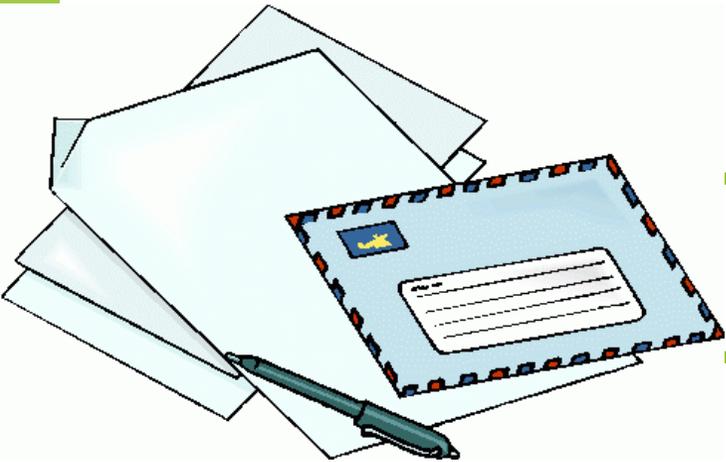
Activities Waiting for the New-Hire

- Send the employee their offer letter, application and background form
- Send them all of their orientation paperwork to complete and bring with them on their first day
 - This was you will just be reviewing questions vs. watching them fill out each paper
- Provide them with an onboarding roadmap of what they can expect on their first day, first week, first month, up through the first 3 - 6 months
- Let them know the dress code, where to park, hours they will work, etc.
- Welcome letters
- Questionnaire about things they like, are interested in, favorite things, etc.



Letting the Employee Know You're eagerly awaiting their Arrival

- Send a welcome email from the CEO
- Develop a “buddy” program and have the buddy reach out to the employee before their start date
- “Buddy” send email with information and to start building that connection with the new-hire
- The “buddy” can help answer questions and set expectations
- “Buddy” will greet them on their first day



Sample CEO Welcome Email



Welcome to UnitedAg! I'm thrilled to welcome you to our amazing company.

UnitedAg represents a fresh culture. A place where employees can learn, grow and develop themselves. A place to take risks. A flat, open culture, and a place to become a part of a team and continue to create an even stronger UnitedAg. Our employees are member-centric, open to new ideas, bring enthusiasm and a willingness to dig into problems and create solutions, a desire to understand who we are and present innovative ideas and work ethic to continue to develop our vision.

I look forward to meeting you and as you will quickly learn, my door is always open for questions, ideas, honesty, laughter, concerns, anything.

Welcome again to UnitedAg and we all look forward to having you join our team.



A handwritten signature in black ink that reads "Kirti Mutatkar".

Kirti Mutatkar, CEO

Sample “Buddy” Welcome Email

Welcome to UnitedAg!



Welcome to UnitedAg! We are very excited to have you on board with us!

My name is Christina Morley, and I am the Client Service Coordinator at UnitedAg. I help our Account Managers maintain relationships with our clients, organize the renewal process, attend open-enrollment meetings and access any escalated benefit issues. Aside from work, I spend most of my time dragging myself to cycle classes, scoping reggae or blues concerts, making to-do lists or trying to find the next new Korean BBQ spot. I will be your Connection Partner during your onboarding. I will get you settled, serve as a resource for advice or guidance over your first few weeks, offer encouragement and support when needed, and make sure you are well-connected to other team members.

On your first day, I will meet you in the lobby and connect you with Shobhana Soni in Human Resources. She will assist you in obtaining your key-fob, walking you through orientation and collecting all your onboarding paperwork.

You will also meet your supervisor, Chana Hauben, when you arrive on your first day. She will guide you through the ins and outs of your department and role. **You can look forward to meeting the rest of your Human Resources team below.**



Shobhana Soni

Education
Background
Interests
Favorite Food
Birthplace
Pets



Sophia Rosales

Education
Background
Interests
Favorite Food
Birthplace
Pets

The attached calendar will give you an idea of what to expect in your first month with us. I look forward to meeting you and getting you ingrained in our UnitedAg team!

Turn Off # 3

Pair up the new employee with a buddy/mentor that is known to be the most unhappy, negative, bashing member of your staff...



Orientation

What Does Orientation Consist of?



- Owned by Human Resources
 - Focuses on the logistical and tactical
- Paperwork
 - Job application, offer letter, back ground check (usually before they start), I-9, W-4, wage notice, health benefits, direct deposit, employee handbook and read receipt, doctor designation, workers' comp information, HIPAA documents, holiday schedule, PTO policy, work schedule, employment at will, STD and LTD, FMLA, dress code, 401(k), 529 College, etc.
 - Have a checklist of all mandatory documents
- Training
 - Sexual harassment, HIPAA, safety training, IIPP, tools and equipment as needed for position, expense policy, etc.

Onboarding

What Does Onboarding Consist of?

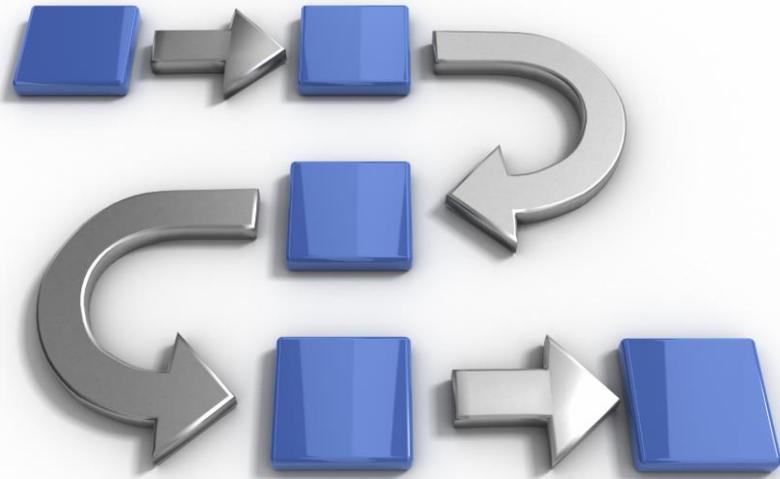
- Owned by hiring department
 - Welcome
 - Meeting staff and co-workers
 - Information
 - Outline of what to expect over the next 3, 6, 9 and 12 months
 - Understanding
 - Integration
 - Engagement
 - Feeling connected
 - Training
 - Development
 - Retention



onboarding

The Process: How to start

- **Define:** show your employee your org chart and how they fit into the department and greater Company
- **Discuss:** job expectations, working styles, metrics for measuring
- **Inform:** how does the department function
 - Have them meet with each department head
- **Share:** what success looks like
- **Involve:** the new hire in what's going on



First day at IKEA.....

Turn Off #1

Make sure a work space has not been created or assigned....



Creating the Employees Space

- Creating a welcoming space before the employee starts
- Make sure the desk is clean, computer set up, phone, basic office supplies
- Warm welcome with - company mug, jacket, hat, map of the building, map/list of surrounding eateries, drycleaners, etc.
- A welcome note from their supervisor

The Vision

This is Where We are Heading:

By the end of their first 6 months, every employee will:

- Understand the organization's vision & strategy
- Have a clear understanding of department, importance of job, and how their position fits in the work flow
- Understands the relation of their role with the overall organization goals
- Understand job responsibilities and performance objectives
- Feels connected with their team and is developing a connection to the overall organization

This is where we are heading: (continued)

- Are introduced to key people they will have working relationships with
- Be engaged with staff, other departments, displays a sense of ownership
- Have access to the tools and resources needed
- Are compliant with legal, HR, and department specific requirements
- Have the opportunity to contribute to work immediately
- Create meaning and purpose for the new-hire

Here's your role.....

Create an onboarding process that outlines the goals and objectives for all new-hires.

- Think about their onboarding experience before they start
- Think about their first day - what would you like the experience to be like
- HR sets milestones to touch base with the new-hire and review performance
 - Touch base with them regularly - 30, 60, 90 days
 - Are things progressing as expected?
 - What's missing?
 - Touch base with their supervisor
 - Are things progressing as expected?
 - Are they performing as anticipated? Any corrective conversation? Additional training?

Turn Off #2

Assign the new employee busy work that has nothing to do with his job description because you are have a busy day.....



Steps to Creating

What makes Onboarding Work?

- ✓ Set Clear Expectations.....Position descriptions, week, month, year detail
- ✓ Know what they should learn and who will teach/guide them
- ✓ Introduction to key stakeholders
- ✓ Create projects/deliverables that allows for a demonstrated result in a short timeframe
- ✓ Set Monthly, Quarterly Goals & Stick to consistent communication

How do I Start?

1. Gather a few of your recent hires to form your committee
2. Listen to their experiences of what went well, what didn't
3. How can you create a more dynamic process based on this feedback?
4. Fill any gaps that may be invisible to HR administration
5. Involve other departments
6. Use a variety of communications to increase interest
7. Everyone, and everything, should enhance their first experiences and start building engagement right away
8. Make it original for your organization

The End Goal

What Does This Mean for Your Organization?

- You get to have a clear set of tools to facilitate the process
- You get to be involved in creating a workplace that employees feel engaged
- You get to experience an employee who is able to contribute faster and in a more meaningful way than without on boarding
- You get employee who want to stay and make an impact at your organization

“Research and conventional wisdom both suggest that employees get about 90 days to prove themselves in a new job. The faster new hires feel welcome and prepared for their jobs, the faster they will be able to successfully contribute to the firm’s mission.”

Onboarding Employees: Maximizing Success by Talya Bauer, Ph.D



The Results

Thorough on-boarding leads to:

- ➔ Higher job satisfaction
- ➔ Organizational commitment
- ➔ Lower turnover
- ➔ Higher professional levels
- ➔ Career effectiveness
- ➔ Lowered stress

