

Onboarding Planning Tool

| WHO/WHEN | Prepare | | | Welcome/Orient | | Connect/Integrate | | |
|----------------------|--|--|---|---|---|--|---|---|
| | Upon hire decision | After Username creation | Close to start date | First day(s) | First week(s) | First month(s) | Months 3-6 | Months 7-12 |
| Local HR Contact | <ul style="list-style-type: none"> Finalize start date ¹ Submit MSS or change transaction in PeopleSoft Confirm onboarding roles & responsibilities Confirm employee's receipt of New Hire Letter Email New Hire Letter to manager Email employee with additional local instructions ² | <ul style="list-style-type: none"> Send username to those who need it | <ul style="list-style-type: none"> Communicate first day logistics³ Communicate social/practical norms & info⁴ | <ul style="list-style-type: none"> Assist with completing any outstanding New Hire Activities | <ul style="list-style-type: none"> Check in with employee Check in with manager | <ul style="list-style-type: none"> Confirm understanding of key department policies & procedures Invite to welcome breakfast or lunch | <ul style="list-style-type: none"> Perform 4-month interview ⁵ Send 5-month notice | |
| Office Administrator | <ul style="list-style-type: none"> Request technology equipment ⁶ Create personnel file Order personalized supplies⁷ Identify office location Identify orientation buddy | <ul style="list-style-type: none"> Update department documents and databases ⁸ Arrange parking, if needed Request phone set up | | | | | | |
| Manager | <ul style="list-style-type: none"> Identify peer buddy ⁹ Block off time for employee on calendar | <ul style="list-style-type: none"> Add to standing meetings Request authorizations ¹⁰ | <ul style="list-style-type: none"> Orient peer buddy Announce hire to department/team/area ¹¹ Place welcome call to employee Create schedule for first few weeks ¹² | <ul style="list-style-type: none"> Orient to role, responsibilities & expectations ¹³ Provide departmental onboarding (i.e., department policy & procedures) Take employee to lunch | <ul style="list-style-type: none"> Identify & address learning needs ¹⁴ Discuss communication ¹⁵ Give overview of department/area/key stakeholders ¹⁶ | <ul style="list-style-type: none"> Orient to GSU as an Institution ¹⁷ Discuss & set goals ¹⁸ Perform 3-month check in Introduce to clients/colleagues from other sites ¹⁹ | <ul style="list-style-type: none"> Perform 6-month review ²⁰ | <ul style="list-style-type: none"> Perform 1-year review ²¹ |
| Peer Buddy | | | <ul style="list-style-type: none"> Block off time to spend with employee | <ul style="list-style-type: none"> Provide NEO information/website | <ul style="list-style-type: none"> Take employee to lunch Suggest mailing lists/Yammer groups of possible interest | <ul style="list-style-type: none"> Orient to GSU campus ²⁷ | | |

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| | | | <ul style="list-style-type: none"> • Prepare welcome packet ²² • Prepare office ²³ | <ul style="list-style-type: none"> • Provide Benefits information/website • Give tour of local work environment(s) ²⁴ • Introduce employee to local co-workers | <ul style="list-style-type: none"> • Orient to local IT systems ²⁵ • Explain local administrative & financial procedures ²⁶ • Orient to GSU online resources | <ul style="list-style-type: none"> • Share perks and benefits of GSU employment ²⁸ | | |
| Local IT provider | | <ul style="list-style-type: none"> • Configure/set up equipment | | <ul style="list-style-type: none"> • Assist with phone and technology equipment set-up and basic use ²⁹ | | | | |

¹ When determining a start date, make sure the manager will be available to spend time with the new hire, and that there will be sufficient time to prepare for him/her

² Could include electronic version of the HR New Hire Letter, local forms, pre-hire checklists

³ Confirm start date & time, and where they should go first; parking/transportation; what to bring/prepare (e.g. I-9 documentation); basic schedule for the day

⁴ This could include info about kitchen facilities and lunch options; info about office space; guidelines on clothing (what to wear/bring, esp. if climate control is an issue)

⁵ Might want to review this grid to identify any incomplete items

⁶ Includes hardware (laptop, tablet, phone); software

⁷ Personalized supplies might include: Business cards, name plate, nametag, badge, uniform

⁸ These might include org charts, local staff directories/databases/websites, online department directory, floor plans

⁹ See Buddy Guidelines

¹⁰ Authorizations might include: access to department servers, printers, intranets, databases, buildings, copiers, etc. Add to mailing lists; add authorizations in Roles database; request travel card

¹¹ Announcements should include start date, employee's role, and a short bio. Copy the new employee, if appropriate.

¹² Identify standing meetings to attend, people to meet/eat with in first weeks; could include welcome breakfast or other local new hire event; 1:1 meetings with area directors, peers, direct reports, clients, colleagues; HR New Hire Orientation and other trainings; campus tour; etc.

¹³ Discuss job description; performance review process; set expectations for the first several months, including getting/giving feedback

¹⁴ Could be standard software (e.g. Microsoft Office); equipment; GSU-specific tools or procedures; business skills; membership fees; reference materials. Training options include 1:1 training by a colleague, open enrollment courses, Lynda.com, reading/self-study, etc.

¹⁵ Include how, when, how often to communicate; specific meeting schedule (both regular meetings and specific onboarding check-ins for assessment/feedback)

¹⁶ Overview might include org structure, subgroups, teams, methods of communication (internal and external), mission, vision, values, culture; include how role interacts with other teams

¹⁷ Orientation to GSU includes mission, vision, structure, culture. Partially done at New Hire Orientation. Could be done through a specific project or assignment.

¹⁸ Include short, medium and long-term goals; Incorporate employee's unique skills, interests & expectations

¹⁹ Could include attending meetings, visiting sites, shadowing; Explain/demonstrate how role/department intersects with other areas at GSU; goal is for the employee to have professional relationships within each group

²⁰ Re-visit job description, goals and expectations; discuss additional training, development, and networking needs

²¹ Include info about Tuition Assistance and Pension (both which kick in after first year of employment), as well as prof development funds available through your department

²² Welcome Packet might include: job description, welcome note from manager, schedule for first few weeks, contact names and phone lists (including who to go to for what), biz cards of people to meet, important websites, access codes, instructions for using phone & computers systems, campus map, parking and transportation information, mission and values of the Institute, information on your unit/school, etc. Could also include special gifts specific to your unit

²³ Preparing the office might include: Cleaning the work area; setting up cube/office space with supplies, including keys, business cards, name plate; assigning a mailbox; adding name to attendance boards

²⁴ Tour might include: where to find bathrooms, supplies, equipment, mailboxes (incoming & outgoing), kitchen equipment, copiers, printers, stairs, elevators, entrances, emergency exits, etc. Also building hours, access codes; where to hang coats; how to adjust temperature

²⁵ Local IT orientation might include websites, intranet, standard programs, folder structure, security protocols

²⁶ Administrative and financial procedures might include: Time off requests; time sheets; vacation tracking; emergency closings; fire/emergency protocol; IT security; ordering materials, books, memberships; travel requests; training; reimbursement procedures; etc. (ideally also let them know where to find this info in writing)

²⁷ Could include accompanying employee on a campus tour and/or to meetings around campus (including a ride on the GSU Shuttle, if possible)

²⁸ Perks & benefits are partially covered at New Hire Orientation, but could be supplemented with Onboarding website and/or conversations tailored to the person's unique needs & interests

²⁹ Could include certificates, Outlook account, GSU App, shortcuts, signatures, standard templates