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# ONBOARDING TOOLKIT

**Resource for Hiring Managers**

Last Updated: August 2018

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**FIRSTLY**

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**WELCOME**

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**HIRING MANAGERS**

Your job as the hiring manager is not over once the hire has been made. A critical piece of a new hire's experience, integration, and engagement in an organization is a successful onboarding experience. So what is onboarding? Onboarding is a set of programs, activities, and support resources that help integrate new hires into the organization and accelerate their performance. Onboarding activities extend beyond the first day and can last anywhere from a few weeks to more than a year. New hires that have been effectively onboarded are more likely to feel they fit with the role and the mission of the organization.

This toolkit is created to provide best practices, example checklists, sample first day schedules, tips, and the essentials to think about in the crucial first year of a new hire's employment.

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**BUILD THE**

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# EXPERIENCE

Managers play a vital role in creating a successful and engaging onboarding experience for their new hire. The following information has been created to help you think about how to develop a fantastic onboarding experience from pre-boarding to the first day through their first year.

## GETTING READY FOR YOUR NEW HIRE'S ARRIVAL

Being prepared for the arrival of your new hire is important when creating a welcoming and positive environment, engaging them in the job and organization right away, and sending a message that you are excited and ready for them to be here!

Consider the following steps when preparing for the new hire's arrival:



### COMMUNICATION

- Send a Welcome Email to the new staff member.
- Send internal emails to team members and appropriate colleagues announcing the hire and start date - include a bit of information about the new person.



### NEED TO DO

- Confirm all necessary paperwork has been completed. Contact [HR ESC](#) for assistance.
- Arrange for any non-standard software to be installed that may be required for the position.
- Create a first day and week schedule.
- Complete organization onboarding:
  - [SCCA Onboarding Tools](#)
  - [Fred Hutch Onboarding Checklist Tool](#)



### THINGS TO REQUEST OR ORDER

Order necessary equipment:

- Assure dedicated space for the new hire
- Desktop/laptop
- Monitors
- Docking station (if applicable)
- Telephone
- Chair

Order necessary supplies:

- Keys
- Office supplies (e.g. staplers, post-it notes, pens, notepad, paperclips)



### PREPARE WORK AREA

- Remove any signs of previous employee.
- Order new name plates.
- Ensure equipment and supplies have been set-up and organized.
- Provide your employee with a clean desk and area that is in move-in condition.
- Create a welcome sign for their work area and think about providing some welcome decorations for their first day.



### CREATE A GREAT WELCOME

- Organize a new hire lunch with you and members of the team.
- Select a "buddy" by matching the new hire with an experienced employee in the department. Connect with the Buddy prior to the new hire's arrival.
- Load a USB stick with helpful information such as helpful links, resources, etc.

## **SAMPLE WELCOME EMAIL**

Provide a personal introduction by sending communication to your new hire welcoming them to your department and their new job. This email can provide them with not only a welcome but pertinent information that they will be curious about, such as: when and where they should arrive on their first day, who will meet them, and how they should dress. Even better, you can also give them a quick call and let them know how excited you are that they are joining your team and let them know they will receive an email from you with details regarding their first day.

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Dear [First Name],

Welcome to the [Organization]. We are so excited to have you join the [Department Name] team on [New Hire Start Date]! Here is everything you need to know about your first day.

When to arrive and where to go?

Please arrive at the Yale Building, Human Resources (HR), room J1-105 at 8:30am.

823 Yale Ave. N.  
Seattle, WA 98109

[Parking Information]

### Sample Schedule

8:30am	Arrive at the Yale Building and check-in with HR, J1-105
9:00 – 11:00am	New Hire Welcome Meeting with HR
11:00 - 11:30am	Meet-up with me or a member of our team
11:30am – 12:00pm	Introduction to work area and team
12:00 – 1:30pm	Lunch and Tour
1:30 – 2:30pm	Break – Equipment, System Access
2:30 – 3:30pm	Review of Week 1 Schedule and Activities
3:30 – 4:30pm	Break – Introduction to Buddy
4:30pm	Next Steps

### What to Bring?

- I-9 Documentation - see I-9 form for acceptable documents
- [other items you would like them to bring on the first day]

Again, welcome. I look forward to your first day and your contribution to our team. Please do not hesitate to contact me if you have any questions.

[Manager Name]

[Manager Title]

[Manager Contact Information]

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# FIRST IMPRESSIONS

## ... MAKE A DIFFERENCE

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Consider the following when creating a schedule for your new hire's first day and week:

- Provide a genuine welcome to the team, schedule enough time to greet them on their first day, ensure they are comfortable, provide introductions, and answer questions.
- Review schedule for training/onboarding.
- Provide a tour of the building and the work area (e.g. break rooms, bathrooms, water fountains, bike racks, showers, and cafeteria).
- Provide emergency preparedness information including location of fire extinguishers, first aid kits, evacuation routes and gathering points (point this information out on a tour).
- Review department structure and the relationship to the organization – provide an organization chart, if available.
- Review job description, job role and expectations, how they will be evaluated, 6 month initial performance review, annual performance review, and how you give feedback on an ongoing basis. The job description and your expectations should be covered in the first week, while the performance information may come later.
- Provide payroll training, time entry deadlines and pay dates.
- Provide an overview of department and personnel policies and procedures, including the location where policies are stored (e.g. vacation time, sick time, call-in procedure, requesting time off).
- Confirm work hours (start/end time, lunch, breaks).
- Complete required forms, trainings and activities.
- Provide information on days/times of regular meetings the employee will be required to attend – review purpose and their role in those meetings.
- Provide an overview of upcoming projects and assignments.
- Complete any necessary equipment set-up and confirm access to phone/voicemail, ensure access to network login, email, and any additional system access.
- Review any department norms (e.g. how the phones are answered, email signatures, potlucks, team communication).
- Review organization and department websites (internet and intranet sites).

# ENSURING THE ESSENTIALS

## ROADMAP TO A SUCCESSFUL ONBOARDING

Create a successful onboarding experience from Day 1 through the new hire's first year by ensuring the following connections have been made.

### CONNECT WITH NEW HIRE



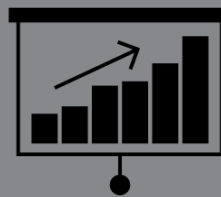
Connect with new hire and learn about who they are, what drives them, and their development goals.

### CONNECT WITH NETWORK



Connect the new hire with their team and key players. Provide opportunities to learn how members of their network connect with their work.

### CONNECT WITH PERFORMANCE



Connect the new hire to their performance. Clearly define their role, responsibilities, and performance expectations. Build opportunities to regularly check-in.

### CONNECT WITH MISSION/STRATEGY



Connect the new hire to the organization's mission, values and strategy. Help align their work to the goals of the organization.



# ROADMAP TIMELINE AND ACTIVITIES

## for the first year

“All you need is the plan, the road map, and the courage to press on to your destination.”

-Earl Nightingale

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### FIRST 30 DAYS

- Build trust by having informal check-in conversations - get to know them!
- Review and help new hire understand job role and responsibilities
- Set regularly occurring 1:1 meetings for once a week or twice a month
- Set performance expectations as a milestone for 30, 60, 90 days
- Introduce new hires to team, major players, and stakeholders in their work
- Add new hire to regular team meetings
- Confirm that the new hire has received and reviewed policies and procedures
- Provide plan to integrate new hire in the network - set-up lunches with colleagues from different areas to introduce them to other staff they will be collaborating with

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### FIRST 90 DAYS

- Continue to help the employee understand reporting relationships and organizational structure
- Extend learning beyond conversation - guide new hires to apply what they have learned from their networking conversations back to their job
- Conduct early verbal review

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### FIRST YEAR

- Conduct a formal 6 month performance review - discuss department, work, and development goals (see [Performance Management](#))
- Conduct formal annual performance review - discuss department, work, and development goals (see [Performance Management](#))
- Discuss career development goals for the long haul

For help with performance issues, contact your [HR Business Partner](#)

For help with goals, contact your [HR Business Partner](#) or [Organization Effectiveness](#)

# | RESOURCES

**...TO HELP YOU ACHIEVE SUCCESS**

## **HELPING YOU IS OUR SERVICE**

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The following will provide sample resources to help you think about and plan for important aspects of building a successful onboarding experience for your new hire.

# ESTABLISH A BUDDY FOR THE NEW HIRE

## Providing connections

### What's a buddy?

A Buddy is someone who partners with the New Hire during their first few months of employment. While primarily responsible for offering advice and guidance regarding the day-to-day aspects of working at Fred Hutch/SCCA, the Buddy may also offer encouragement and connect the New Hire to resources.

### KEY CHARACTERISTICS OF A BUDDY

#### UPBEAT CHAMPION

Someone who is a big fan of the organization, the work and opportunities ahead.

#### COMMUNICATOR

Provides relevant information to the new hire and encourages a process of continued, self-directed learning.

#### ROLE MODEL

Is a model employee and exemplifies Fred Hutch/SCCA values.

#### MOTIVATED

Has a positive outlook and uses that perspective to help build self-confidence and loyalty in the new hire.

#### STRONG PERFORMER

Helps guide the new hire in many situations based on his/her experience and knowledge obtained.

### Why have a Buddy?

The purpose of new hires being assigned a Buddy is to help welcome employees and affirm their decision to join Fred Hutch/SCCA. They provide new hires with a reliable, motivated, single point-of-contact for their basic questions regarding their work experience at Fred Hutch/SCCA. Buddies also help establish onboarding as a process rather than a single learning event.

**What a Buddy is Not:** A Buddy should not assume the role of mentor, manager, or trainer.

### Buddy Responsibilities:

- Advise and guide
- Encourage
- Connect – people, knowledge and resources
- Introduce culture

# ENGAGE EARLY

## ... CHECK-IN OFTEN

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### Early Questionnaire

*Intructions: This short questionnaire is designed to help you prepare for early meetings with your new hire to learn more about them.*

#### Understanding Personality and Work Style:

- What excites you most about your new job?
- What motivates you to do a good job?
- How do you tend to communicate best with your manager (e.g. email, phone, in-person)? (It will be important for you as the manager to also share your expectations regarding communication.)
- How do you tend to communicate best with other employees, other teams, and/or customers (e.g. email, phone, in-person)? (Also share the communication norms your department may have established.)
- If someone wants to teach/instruct you, how can they effectively do this?
- For what do you most want to be appreciated/recognized? How do you want to receive this appreciation/recognition?
- When someone wants you to change your behavior/ideas, how should they approach you so that you are likely to respond positively to the request? What behaviors on the other person's part would most likely get a negative response from you?

Also, communicate your management, work, and communication style with your new hire as you are asking these questions.

#### Discuss Transition-Related Concerns/Issues:

- What are you most looking forward to during this transition?
- What are your greatest concerns about this transition?
- What do you think your objectives should be 30, 60, and 90 days out?

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# CHECK-IN OFTEN

## ... ENGAGE THROUGH-OUT

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### Check-in Question

- How is the job going?
- What kind of surprises have there been?
- How helpful has your training been? What other training do you need?
- What has been helpful/less helpful with having a buddy? Any changes you would suggest for future buddies?
- What kinds of tools do you need in order to be successful in your role?
- How would you measure your progress since you started work?
- What hiccups have you encountered with colleagues and/or stakeholders?
- What kinds of things did you learn from in-person New Employee Orientation (NEO) and the online orientation modules?
- What kinds of improvements would you like to see in our department orientation and onboarding experience?
- Are there any tools or resources we should be providing but are not?
- Is there anything you feel “out of the loop” on?
- Is there anything you do not have access to that you need for your work?
- Is there anything you would like to tell me that I have not asked about?

## EARLY PERFORMANCE CONVERSATIONS

Feedback provided in the early stages of an employee's career helps improve employee performance, increases engagement, and builds trust. Use the checklist below to prepare for the new hire's early informal review.

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### PREPARE FOR AN INFORMAL REVIEW - QUESTIONS TO ASK

- Have I had enough time to observe the new hire's performance (e.g., do I have specific examples to support my points)? Am I evaluating based on what is reasonable to expect of a new hire at this point in their tenure?
- Have I solicited input on the new hire's performance from colleagues who work with them on a regular basis?
- Have I set the new hire's expectations about this early informal review and let them know the focus will be on preparing them for their formal review?
- For the developmental areas I will be covering in the informal review, do I have specific, actionable advice on how the new hire can address these (e.g., training or mentoring opportunities)?
- Am I prepared to address whether the new hire's behavior is commensurate with organizational values?
- If I have significant concerns to address with the new hire, have I obtained guidance from my HR Business Partner?
- Can I help the new hire identify strengths they can use in their current role?
- Can I help the new hire prioritize activities that play to their strengths?
- Are there expectations for performance that I need to clarify with the new hire?

# GOAL SETTING GUIDE

When people begin a new role, they always want to know, “How am I doing?” To assist your new hire to work toward reasonable, achievable goals to evaluate their own performance, use benchmarks to be achieved at set times over the first three months.

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## FIRST 30 DAYS

- 1.
- 2.
- 3.

## BY 60 DAYS

- 1.
- 2.
- 3.

## BY 90 DAYS

- 1.
- 2.
- 3.

## BY 6 MONTHS

- 1.
- 2.
- 3.

Continue goals conversation annually during performance review time.

# CAREER CONVERSATIONS - SAMPLE QUESTIONS

Career development is an important ingredient to ensuring your employee stays engaged and motivated. Knowing that you and the organization are invested in their career and developing them will help employees want to stay in their role and work harder. Even if an employee is new, it's not too early to begin these conversations.

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## REVIEW EMPLOYEE STRENGTHS AND PREFERENCES

- In your past work experiences, what roles, project work, and environment did you enjoy?
- What do you wish you could do more of?
- What have you enjoyed the most in your past jobs?
- What are you most interested in learning?
- What kind of tasks get pushed to the bottom of your "to do" list?

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## EXPLORE THE FUTURE

- If you could create your ideal job, what would it involve?
- What strengths and skills do you want to leverage?
- Is there a specific technical, functional, or customer domain where you'd like to gain knowledge or experience?
- Are there skills you're interested in developing? What are they, and why?

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## CONSIDER THE ENVIRONMENT

- In what work settings do you do your best work? What settings are challenging for you?
- What strengths do you bring to a project/assignment? Which ones have the most impact?
- What skills do you use at work that you'd like to improve?

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## DISCUSS NEXT STEPS

- How frequently would you like to have this type of conversation in the future?
- When should we have a follow-up discussion to ensure we are making progress toward your development goals?



# INTERNAL TRANSFER/PROMOTION PROCESS CHECKLIST

When internally transferring or promoting an employee, it is important that you provide an outstanding employee experience that actively supports the employee in the transition, and sets the stage for success of all partners in the process.

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## CLEARLY DEFINE & COMMUNICATE THE NEW ROLE

- Create/approve job description for the new role (what's different and what remains the same?)
- Confirm understanding of the new responsibilities with the employee, including deliverables, metrics, check-ins, etc.
- Communicate the new role to your department and the responsibilities and authority the staff member will have
- Have individual conversations with those who may have wanted the new role prior to any public introduction of the transferred/promoted employee
- Communicate with key contacts/stakeholders about the promotion/transfer
- Check back with key contacts to ensure ongoing success of the transition (60-90 days)

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## ACTIVELY MANAGE THE TRANSITION OF TASKS

- Capture all prior responsibilities and confirm who will take over each item and by when
- Actively manage selection (backfill) and transition of tasks to ensure timely offloading of prior work

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## FOSTER A GREAT EMPLOYEE EXPERIENCE

- Review Onboarding Toolkit: Identify and schedule appropriate steps for this transition
- Schedule regular check-ins (weekly initially)

For help with internal transition/promotion, contact your [HR Business Partner](#).