The Manager’s Guide to New Hire Onboarding

Look inside for

• A checklist to prepare for a new hire’s arrival
• Sample welcome letters
• Discussion guide for 30-/60-/90-day check-ins
Onboarding staff

BEST FOR Managers

RECOMMENDED PREP
Have your computer handy to download customizable tools

LEARN HOW TO
• Welcome new hires to your team
• Make sure new hires have everything they need on their first day
• Check in with new hires to see how they’re settling in

* Estimate does not include additional time required to use each tool.
The Manager’s Guide to New Hire Onboarding
HR Advancement Center

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Executive Summary

New Hire Turnover Remains Stubbornly High

One of the long-standing challenges in health care is retaining newly hired staff members. Despite manager and HR efforts, newly hired employees continue to turnover at a rate far above that of more tenured staff members. In fact, new hire turnover is a disproportionate driver of an institution's overall turnover rate. Nationally, employees with less than one year of tenure make up one-quarter of all health care turnover.

And of course, turnover is costly. Replacing a departing staff member requires time, energy, and resources from across the organization. It creates an extra burden for managers and frontline staff, who often have to absorb extra work while a position is vacant, interview candidates, and train and onboard the newly hired replacement. And turnover places extra stress on HR staff as well, who have to source, recruit, screen, and onboard replacements.

A “Back to Basics” Onboarding Program Can Dramatically Reduce New Hire Turnover

The good news is much of new hire turnover can be avoided through better onboarding. All too often, new hires depart an organization because they never felt they fit in, didn’t feel a strong connection with their manager, or believed they were underperforming in their new role. A strong onboarding program can prevent each of these turnover drivers.

And best of all, strong onboarding programs aren’t necessarily time or resource intensive. For managers, often the greatest challenge in providing an effective onboarding program is ensuring that a few critical onboarding activities aren’t crowded out by urgent—but ultimately less important—daily crises.

Six Critical Steps Managers Can Take to Improve Department Onboarding

This guide equips managers with the six steps that will most efficiently and effectively onboard new hires. Collectively, these six steps will help managers ensure new hires feel welcomed on their first day, supported on their first week, and receive meaningful feedback about their performance across the first three months.

While we recommend that a manager should use all six tools, a time pressed manager will see substantial improvements in new hire onboarding by using just two tools:

► Tool #5: Discussion Guide for First Check-In
► Tool #6: Discussion Guides for 30/60/90 Day Check-Ins

1) Data comes from the HR Advancement Center’s annual turnover and vacancy benchmarking initiative.
2) Excluding PRN, per diem, and casual employees.

Source: HR Advancement Center interviews and analysis.
Resources Available Within the New Hire Onboarding Series

The Manager’s Guide to New Hire Onboarding is one of two guides in our new hire onboarding series. Each guide is written for a different user. This guide is intended to be used by hiring managers; the companion guide, HR’s Guide to New Hire Onboarding, is for HR leaders. While the two guides complement one another, they both stand alone and can be used independently.

The specific tools in each guide are listed below. You can access both volumes through our website at advisory.com/hrac/newhireonboarding.

The Manager’s Guide to New Hire Onboarding

▶ Tool #1: Manager Preparation Checklist for New Hire Arrival
▶ Tool #2: Welcome Letter Templates
▶ Tool #3: New Hire Welcome Packet Checklist
▶ Tool #4: New Hire First Day Activities Checklist
▶ Tool #5: Manager-New Hire Discussion Guide for First Check-In
▶ Tool #6: Manager-New Hire Discussion Guide for 30/60/90-Day Check-Ins

HR’s Guide to New Hire Onboarding

▶ Tool #1: HR-New Hire Welcome Email Checklist
▶ Tool #2: Guidelines for Developing New Hire Road Map
▶ Tool #3: Interactive Orientation Activity Pick List
▶ Tool #4: Step-by-Step Instructions for Creating Self-Guided Institution Tour
▶ Tool #5: Executive-New Hire Group Discussion Guide
▶ Tool #6: HR-New Hire Discussion Guide for 30-Day Check-Ins
▶ Tool #7: Administrative Director-New Hire Discussion Guide
▶ Tool #8: Guidance on Building a New Hire Onboarding Survey
▶ Tool #9: Assessing Available Resources for New Hire Mentorship Program
▶ Tool #10: Steps for Implementing a New Hire Buddy Program
▶ Tool #11: New Hire Buddy Commitment Card
▶ Tool #12: New Hire Mentor Role Description
▶ Tool #13: New Hire Support Coordinator Job Description

Source: HR Advancement Center interviews and analysis.
Table of Contents

For ease of use, we have provided an editable version of some tools on our website, indicated here with a checkmark. Please visit our website at advisory.com/hrac/newhireonboarding to download these tools and to access the companion book, HR’s Guide to New Hire Onboarding.

<table>
<thead>
<tr>
<th>Tool</th>
<th>Intended Use</th>
<th>Editable Version</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tool #1: Manager Preparation Checklist for New Hire Arrival</td>
<td>List of activities to prepare manager to welcome new hire</td>
<td>✔</td>
<td>7</td>
</tr>
<tr>
<td>Tool #2: Welcome Letter Templates</td>
<td>Sample language manager can use to reach out to new hire before start date</td>
<td></td>
<td>8</td>
</tr>
<tr>
<td>Tool #3: New Hire Welcome Packet Checklist</td>
<td>Inventory of materials to be included in new hire’s welcome packet</td>
<td>✔</td>
<td>9</td>
</tr>
<tr>
<td>Tool #4: New Hire First Day Activities Checklist</td>
<td>List of potential activities for new hire’s first day</td>
<td>✔</td>
<td>10</td>
</tr>
<tr>
<td>Tool #5: Manager-New Hire Discussion Guide for First Check-In</td>
<td>Detailed questions to encourage meaningful discussion during manager-new hire check-in meetings at the end of first week of employment</td>
<td>✔</td>
<td>11</td>
</tr>
<tr>
<td>Tool #6: Manager-New Hire Discussion Guide for 30/60/90-Day Check-Ins</td>
<td>Detailed questions to enable managers to assess new hire’s acclimation to the role and institution</td>
<td>✔</td>
<td>12</td>
</tr>
</tbody>
</table>

Source: HR Advancement Center interviews and analysis.
Tool #1: Manager Preparation Checklist for New Hire Arrival

Goal

This checklist contains the steps managers should take before each new hire’s first day. Managers should review the list at least two weeks before new hire’s start date to allow sufficient time to complete all the tasks.

Estimated Time Required

1 hour total (spread over multiple activities).

Related Tools

Tool #2: Welcome Letter Templates (page 8) and Tool #3: New Hire Welcome Packet Checklist (page 9).

Available Online

To access an editable version of this checklist, please visit advisory.com/hrac/newhireonboarding.

- Confirm new hire’s start date with HR
- Mail department welcome letter to new hire’s home one to two weeks before start date
- Call new hire one week before start date
  - Congratulate new hire and welcome him or her to the team
  - Provide an overview of the first week on the job (schedule, tasks, dress code, etc.)
  - Ensure new hire understands instructions for the first day (directions to the hospital, parking arrangements, where to report, identification to bring, etc.)
  - Provide a contact for additional questions/issues that arise before start date
- Assign staff mentor/buddy
- Alert IT Department/Operations of new hire’s start date to arrange the following (if applicable):
  - New hire institution ID/badge and scheduled time for photo (if required)
  - Computer access
  - Email account
  - Voicemail account
  - Cube/office assignment
- Add new hire to department organizational chart and telephone/email directory
- Announce new hire’s position and scheduled start date to department staff, either at staff meeting or via email
- Prepare new hire’s workspace (ensure completion of all applicable tasks)
  - Clean work area
  - Order/install telephone
  - Confirm new hire’s telephone extension is working and extension is correct
  - Assign departmental mailbox
  - Order supplies, business cards, and name plate
  - Arrange for keys or passcode access
- Set up cell phone or pager account (if applicable)
- Set up travel account (if applicable)
- Prepare department welcome packet for first day (See Tool #3: New Hire Welcome Packet Checklist on page 9)
- Arrange for department first day welcome gestures (welcome sign on new hire’s work station, snack/luncheon welcoming new hire to department, etc.)
Tool #2: Welcome Letter Templates

Goal
These templates are examples of welcome letters. Managers should adopt these for their own use and mail a welcome letter to each new hire one to two weeks before their start date. Managers may wish to have the new hire's coworkers sign the letter as well.

Estimated Time Required
10 minutes.

Additional Resources
Note card, envelope, stamp, and new hire's mailing address.

Sample Letter #1
Dear Allison,
I would like to extend a cordial welcome to you from all our staff as you join the Diagnostic Radiology Department. I truly enjoyed meeting with you last month and learning about your experiences as a student at Montgomery College. Soon you will be making significant contributions to our team and to the patients we serve. I will meet you at the reception desk on the first floor at 9am on Monday.
We are glad to have you onboard!
Sincerely,
Leigh Ann Gardner

Sample Letter #2
Dear Vijay,
I would like to extend a warm welcome on behalf of myself and from all our staff as you join the pediatrics team at General Hospital. I enjoyed meeting with you last month and know that your prior experience in the pediatrics department of Mercy General will be a valuable asset to our department. We are fortunate to have you join us!
Sincerely,
Mark Johnson

Sample Letter #3
Dear Rivka,
Welcome! We are delighted to have you join our department. It was a pleasure meeting you in April and we look forward to working with you soon. My colleague Sarah Brown will meet you in the lounge on Monday morning. We are thrilled to have someone with your experience joining the team!
Sincerely,
Bradley Smith

Source: Carle Foundation Hospital, Urbana, IL; HR Advancement Center interviews and analysis.
### Tool #3: New Hire Welcome Packet Checklist

#### Goal

This checklist contains items managers should include in the welcome packet new hires receive on their first day. If you are assigning each new hire a buddy,¹ consider putting the buddy in charge of creating the welcome packet and reviewing it with the new hire.

#### Estimated Time Required

1 hour to collect materials for the initial packet, 10 minutes for each subsequent packet.

#### Related Tools

Tool #2: Welcome Letter Templates (page 8).

#### Available Online

To access an editable version of this checklist, please visit advisory.com/hrac/newhireonboarding.

<table>
<thead>
<tr>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome note from the department</td>
</tr>
<tr>
<td>Hospital/department map</td>
</tr>
<tr>
<td>Copy of job description</td>
</tr>
<tr>
<td>Department mission and goals</td>
</tr>
<tr>
<td>Department organizational chart and leadership bios</td>
</tr>
<tr>
<td>List of current department projects and related materials</td>
</tr>
<tr>
<td>Department staff work schedule and scheduling procedures</td>
</tr>
<tr>
<td>Calendar of department meetings, events, holidays, and training opportunities</td>
</tr>
<tr>
<td>Department dress code, break policy, and other policy and procedure highlights</td>
</tr>
<tr>
<td>Explanation of benefits and PTO policies</td>
</tr>
<tr>
<td>Department security and building access procedures</td>
</tr>
<tr>
<td>Department phone and email directory (including new hire’s contact information)</td>
</tr>
<tr>
<td>Phone and email directory of primary contacts in other departments</td>
</tr>
<tr>
<td>List of whom to contact for help with specific challenges</td>
</tr>
</tbody>
</table>


Source: HR Advancement Center interviews and analysis.
Tool #4: New Hire First Day Activities Checklist

Goal
This checklist contains the “must-do” steps to ensure new hires learn crucial information on their first day.

Estimated Time Required
1 hour for each new hire, direct time spent by manager.

Available Online
To access an editable version of this checklist, please visit advisory.com/hrac/newhireonboarding.

- Manager-new hire meet-and-greet
  - Review job description and expectations
  - Review work schedule, time off and holidays, pay schedule, overtime policies (if applicable), dress code, and safety plans
- Manager takes new hire to IT/Operations (if not done by HR) to obtain the following:
  - Keys
  - ID badge
  - Email
  - Voicemail
  - Network and printer access
  - Relevant passwords
- Tour work station and introduce new hire to colleagues

Source: Overlake Hospital Medical Center, Bellevue, WA; Community Memorial Hospital, Menomonie Falls, WI; Vanderbilt Medical Center, Nashville, TN; Renown Rehabilitation Hospital, Reno, NV; Northwestern University, Evanston, IL; HR Advancement Center interviews and analysis.
Tool #5: Manager-New Hire Discussion Guide for First Check-In

Goal
This discussion guide equips managers to jump-start more meaningful conversations with new hires. Managers should hold the first conversation at the end of the new hire’s first week.

Estimated Time Required
20 to 30 minutes.

Available Online
To access an editable version of this guide, please visit advisory.com/hrac/newhireonboarding.

1. Which team members have you met this week?
   • Have you been introduced to [assistant manager], [charge nurse], [secretary], and [peer mentor/buddy]?

2. What have our team members done to make you feel welcome?

3. If you had questions, was someone always available to answer them?
   • Who has helped you the most?

4. What was the best part of your first week?
   • Why did you enjoy that experience?
   • If no answer to initial question, ask: What activity did you find most interesting?

5. What was the most challenging thing you had to deal with this week?
   • How could we have made that challenge easier to manage?

6. Is there anything that you think we should change to help new staff during their first week on the job here?
   • Can you tell me more about why we should make that change?

7. Is there anything we haven’t explained fully?
Tool #6: Manager-New Hire Discussion Guide for 30-/60-/90-Day Check-Ins

**Goal**
This discussion guide equips managers to gauge how a new hire is adjusting and surface any potential retention concerns. Managers should meet with each new hire after the first 30, 60, and 90 days of employment and ask these questions. If the new hire’s responses signal that they may be a retention risk, managers should consider meeting with the new hire more frequently to monitor their progress and intent to stay.

**Estimated Time Required**
30 minutes per discussion.

**Available Online**
To access an editable version of this guide, please visit advisory.com/hrac/newhireonboarding.

<table>
<thead>
<tr>
<th>Discussion Questions</th>
<th>Signals of Possible Retention Risk</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Baseline Expectations</strong></td>
</tr>
<tr>
<td>1. Has this job met your expectations? In what ways? Where has it fallen short?</td>
<td>• Answer to primary question is no</td>
</tr>
<tr>
<td>2. Do you have the tools and equipment you need to do your job?</td>
<td>• Expectations about work conditions unrealistic</td>
</tr>
<tr>
<td></td>
<td><strong>Acculturation</strong></td>
</tr>
<tr>
<td>3. Which coworkers have been especially helpful to you?</td>
<td>• Unable to provide examples of helpful colleagues or personal successes</td>
</tr>
<tr>
<td>4. From what sources have you obtained information about news in the department and the institution?</td>
<td>• Information sources listed are unreliable</td>
</tr>
<tr>
<td>5. Tell me about some of your successes during your first [30/60/90 days].</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Challenges</strong></td>
</tr>
<tr>
<td>6. Describe any frustrations you’ve experienced so far.</td>
<td>• High number of frustrations</td>
</tr>
<tr>
<td>7. Have you done anything to address these frustrations?</td>
<td>• Has not tried to resolve problems</td>
</tr>
<tr>
<td></td>
<td>• Blames others for problems</td>
</tr>
<tr>
<td></td>
<td>• Is bothered by typical conditions of department</td>
</tr>
<tr>
<td></td>
<td><strong>Suggested Onboarding Improvements</strong></td>
</tr>
<tr>
<td>8. In what areas would more training be helpful for you and other new hires?</td>
<td>• Uninterested in personal feedback/development</td>
</tr>
<tr>
<td>9. If you could change one aspect of your experience in the department, what would it be?</td>
<td>• No desire to help department improve</td>
</tr>
<tr>
<td>10. On which aspects of your job performance would you like more feedback?</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Overall Concerns</strong></td>
</tr>
<tr>
<td>11. Do you have any concerns about your job that I could address?</td>
<td>• High number of concerns</td>
</tr>
<tr>
<td></td>
<td>• Does not share any concerns but appears dissatisfied or anxious</td>
</tr>
</tbody>
</table>

Source: HR Advancement Center interviews and analysis.
Want more on new hire onboarding?

This study is a publication of the HR Advancement Center, a division of Advisory Board. As a member of the HR Advancement Center, you have access to a wide variety of resources, including webconferences, studies, toolkits, and more. Check out some of our other resources on onboarding and retention.

**Study: Stop Turnover in the First Three Years**
Learn 11 best practices to retain millennial staff through their first three years at your organization.

**Toolkit: HR’s Guide to New Hire Onboarding**
Get 13 tools to build the infrastructure for a strong new hire onboarding program.

**Toolkit: The Manager’s Guide to Engaging Staff**
Access ready-to-use tools to improve your team’s engagement. You’ll find tools to recognize staff, collect their input, support their professional development and more.

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