The Advisory Board Company | HR Advancement Center

# HR's Guide to New Hire Onboarding

- Interactive Orientation Activity Picklist
- HR-New Hire Discussion Guide
- Guidance on Building a New Hire Onboarding Survey

# HR Advancement Center

### Contributing Consultants

Ann Forman

Katherine Philips, PhD

### Managing Director

Jennifer Stewart

### Design Consultant

Matt Starchak

### Executive Director

Steven Berkow, JD

# 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 turn over 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 nearly 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. Often the greatest challenge for HR staff in building an onboarding program is not letting the desire to build a perfect onboarding program stand in the way of building a very good one. In other words, it can be difficult to identify which limited number of onboarding elements are most important—and which elements can wait until staff have additional energy and resources.

### 13 Steps HR Can Take to Improve Onboarding

This guide equips HR to quickly and efficiently build the infrastructure for a strong onboarding program. Collectively, these 13 tools will ensure new hires feel connected to the institution—their role, the mission and values, the people—from the day they start.

While we recommend that HR staff should use nearly all of these tools, a resource-pressed HR team will see substantial improvements in new hire onboarding by using just four tools:

- Tool #1: HR-New Hire Welcome Email Checklist
- Tool #3: Interactive Orientation Activity Pick List
- Tool #6: HR-New Hire Discussion Guide for 30-Day Check-Ins
- Tool #8: Guidance on Building a New Hire Onboarding Survey

Source: HR Advancement Center interviews and analysis.

# Resources Available Within the New Hire Onboarding Series

*HR'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 HR staff; the companion guide, *The Manager's Guide to New Hire Onboarding,* is for hiring managers. 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

# Where to Start

The questions below are intended to help you identify opportunities to strengthen your institution's new hire onboarding program. If you answer "no" to a question, the column on the right directs you to the relevant resource within this guide.

## Onboarding Self-Assessment

| Does your institution currently… | If not, see… |
|---|---|
| …welcome new hires via email prior to start date? | Tool #1: HR-New Hire Welcome Email Checklist |
| …have a road map new hires can use to track progress through orientation and their onboarding? | Tool #2: Guidelines for Developing New Hire Road Map |
| …provide opportunities for new hires to interact in a fun and social way? | Tool #3: Interactive Orientation Activity Pick List |
| …orient new hires to your facility? | Tool #4: Step-by-Step Instructions for Creating Self-Guided Institution Tour |
| …give new hires executive exposure during orientation? | Tool #5: Executive-New Hire Group Discussion Guide |
| …establish time for HR to check in with new hire around the 30-day mark? | Tool #6: HR-New Hire Discussion Guide for 30-Day Check-Ins |
| …establish time for new hires to meet with a senior level administrator one-on-one? | Tool #7: Administrative Director-New Hire Discussion Guide |
| …administer a survey to gauge new hire opinions on the effectiveness of institution/department orientation? | Tool #8: Guidance on Building a New Hire Onboarding Survey |
| …understand the difference between implementing a mentor and buddy program? | Tool #9: Assessing Available Resources for New Hire Mentorship Program |
| …have established guidelines for a buddy program? | Tool #10: Steps for Implementing a Buddy Program |
| …require buddies to sign a formal commitment to their new role? | Tool #11: New Hire Buddy Commitment Card |
| …understand the qualifications and qualities of an effective mentor? | Tool #12: New Hire Mentor Role Description |
| …have a dedicated individual focused on new hire retention and support? | Tool #13: New Hire Support Coordinator Job Description |

Source: HR Advancement Center interviews and analysis.

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# Table of Contents

# Tool #1: HR-New Hire Welcome Email Checklist

> **Goal:** This template provides HR leaders with a list of potential information to be included in a welcome email. HR should send the welcome email to the new hire three days prior to the new hire's first day of employment.
>
> **Estimated Time Required:** 20 minutes to compile materials and 10 minutes to draft and send multiple emails.
>
> **Additional Resources:** List of new hires' email addresses and any documents to be attached to the email (for example: institution's mission statement, dress code policy, recent brochure, etc.).
>
> **Available Online:** To access an editable version of the checklist, please visit advisory.com/hrac/newhireonboarding.

## Welcome Email Checklist

- ❑ Warm welcome email including some facts about the organization such as:
    - ❑ Recent awards
    - ❑ Growth rate
    - ❑ Fun fact about region, executives, new equipment, etc.

- ❑ Location and time new hire should plan to arrive on site

- ❑ Information on parking and/or public transportation

- ❑ Name of contact who will meet new hire on the first day

- ❑ Calendar of orientation activities or first day/week schedule

- ❑ Description of orientation activities or courses

- ❑ Dress code or uniform policy

- ❑ List of documents to bring for employment verification and benefits

- ❑ Inclement weather policy

# Tool #2: Guidelines for Developing New Hire Road Map

**Goal:** These are step-by-step instructions for creating an onboarding road map for new hires. The goal of these road maps is to encourage new hires to play an active role in their own onboarding process.

**Estimated Time Required:** Approximately 10-15 hours to create the first road map; approximately 2 hours every 6 months to update or edit current road map.

**Additional Resources:** Printing costs.

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### Step 1     Select new hire onboarding activities

Select the onboarding activities that new hires should complete within a designated time frame (e.g., first three months, first six months). The list below contains common onboarding elements. Check the activities you would like to include in your current onboarding program. For activities marked with an asterisk, you can find detailed instructions at advisory.com/hrac/newhireonboarding.

**Potential Onboarding Activities**

- ❑ Hospital-wide new employee orientation
- ❑ Interactive hospital tour*
- ❑ Week one check-in with manager*
- ❑ Department orientation
- ❑ Meeting with new-hire support coordinator*
- ❑ New hire support group meeting
- ❑ Meeting with peer buddy/mentor*

- ❑ "Ask Senior Management" forum
- ❑ 30-day check-in with manager*
- ❑ 30-day check-in with HR*
- ❑ New employee onboarding survey (at 30 days)*
- ❑ Discussion with administrative director*
- ❑ Evaluation of department orientation

- ❑ 60-day check-in with manager*
- ❑ New employee onboarding survey (at 60 days)*
- ❑ 90-day check-in with manager*
- ❑ New employee onboarding survey (at 90 days)*
- ❑ Six-month progress review by manager
- ❑ Career development forum

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### Step 2     Group elements by time periods

Group your institution's onboarding elements by key time periods in the onboarding process. You should aim to divide your program into at least three and no more than six time periods.

Sample onboarding time periods:

1. *Start date through first month*
2. *First through third month*
3. *Third through sixth month*
4. *Sixth through twelfth month*

Your institution's onboarding program time periods:

1. _____
2. _____
3. _____

4. _____
5. _____
6. _____

Source: HR Advancement Center interviews and analysis.

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# Tool #2: Guidelines for Developing New Hire Road Map (cont.)

**Build graphical representation of road map**

Design a graphical representation of your onboarding elements, grouping them by key time periods and depicting them in a fun, interactive format. This can help engage new hires in the onboarding process. We have provided two examples of onboarding road maps.

**Sample Road Map, Scripps Green Hospital**



### Welcome to Scripps Green Hospital

#### Ahoy mate! Welcome aboard!

Scripps Green Hospital's captain (Robin Brown, chief executive) and crew (the staff) would like to extend a warm welcome to you as you begin your journey and go through our Onboarding Orientation Program. This comprehensive six-month program is designed to welcome, engage and communicate expectations to new employees in our organization.

As part of the onboarding process, you should visit security to receive your ID badge with a compass sticker affixed to it. The compass sticker serves as a symbol to others that you are a new crew member who is in the process of charting your course.

This passport, your guide through our onboarding process, should be completed within your first 180 days of employment. Utilize this pocket tool to navigate the oceans of possibilities here at Scripps Green. Your passport includes the following: itinerary (a schedule of events over the next 180 days); Ports of Call (a self-guided tour); Green dialect (a dictionary of commonly used acronyms) and other useful information. We wish you smooth sailing ahead!



### Your Itinerary

Setting Sail: New Employment Orientation _____ MI

location | date/time

One-to-One with Manager _____ MI

location | date/time

"The Captain's Welcome": Green Employee Orientation

location | date/time

One-to-One with Administrative Director _____ MI

location | date/time

One-to-One with Human Resources _____ MI

location | date/time

Second One-to-One with Manager _____ MI

location | date/time

New Employee Forum with Executives _____ Exec. Initials

location | date/time

Pick-a-Meeting/Attend-a-Meeting (coordinate with your manager) _____ MI

location | date/time

Completion of Ports of Call _____ MI

MI=Manager Initials

# Tool #2: Guidelines for Developing New Hire Road Map (cont.)

**Sample Road Map, Danbury Hospital**



**Value in People** — Our VIP Program

★ New Employee – Introduce Yourself to Others   ★ New Employee – Participate in Value In People Activities   ★ New Employee – Communicate Openly – Ask Questions

★ Manager – Encourage Participation in Activities

★ Manager – Schedule Frequent Discussions

★ Manager – Welcome New Employee

**Belonging (6 – 12 months)**
- Manager - Evaluate for Possible "TOPS" Recognition
- New Employee - Attend "Let's Talk About Development at DHS"
- Buddies - Form a Lasting Relationship
- ONE YEAR ANNIVERSARY
- Buddies - Broaden the Experience
- HR - Conduct VIP Survey #2, Analyze and Make Recommendations
- Manager - Hold Individual Mid-Year Progress Review

**Fitting In (3 – 6 Months)**
- Manager - Evaluate Effectiveness of Department Orientation
- Manager - Evaluate for Possible "TOPS" Recognition
- Buddies - Establish Trust
- New Employee - Attend "Let's Talk About Success at DHS"
- Manager - Evaluate for Possible "TOPS" Recognition

**Getting Settled (1 – 3 Months)**
- Buddies - Create the Connection
- HR - Conduct VIP Survey #1, Analyze and Make Recommendations
- Manager - Hold Performance Planning Session Within 30 Days
- New Employee - Attend "Ask Senior Management"

**Starting Out (0 – 1 Month)**
- New Employee Sponsor - Coordinate VIP Activities Inside and Outside Department
- Manager - 1st Week Focus on the Department
- Manager - 2nd Week Focus on Others at DHS
- Manager - Evaluate for Possible "TOPS" Recognition
- Manager - Within 30 Days Focus on the Job
- Manager - Cover the Basics
- Manager - Attend NEO Lunch
- New Employee - Attend New Employee Orientation (NEO)
- **Start**

Legend:
- ● Department Orientation – Build a Strong Foundation!
- ● Buddy Program – Reach Out!
- ● VIP Surveys – We're Listening!
- ● VIP Gatherings – Let's Celebrate!
- ● PEP – Performance Expectations Program
- ● TOPS – Targeting Outstanding Performance Success
- ● Other Activities
- ● New Employee Sponsor – Peer

★ Leadership – Hold Managers Accountable   ★ Leadership – Show Visible Support for Value In People   ★ Leadership – Participate in Activities

Road map divided into discrete stages to help employees understand progression of onboarding process

Description clearly indicates intended owner of each activity

Source: Danbury Hospital, Danbury, CT; HR Advancement Center interviews and analysis.

advisory.com

# Tool #3: Interactive Orientation Activity Pick List

**Goal:** The lists below contain potential orientation icebreakers and learning activities that are alternatives to a lecture format. These activities are designed to make orientation more interactive and engaging for both new hires and staff members.

**Estimated Time Required:** Ranges from 15 minutes to one hour depending on the activity.

**Additional Resources:** Depending on the activity, additional resources may include: ball (for ball toss), word search puzzles, Pictionary-style board game, welcome video.

### Sample Educational Games and Ice Breakers

| Game | Description |
|---|---|
| **Name-Game Ball Toss** | New hires sit in a circle and pass around a ball, saying each other's name before each throw. |
| **Finding Common/ Opposite Ground** | New hires have five minutes to meet one another. During each conversation, pairs should write down one thing they have in common and one thing they do not have in common (e.g., college, sports team preferences, hometown). The goal is to meet as many new hires as possible. |
| **Where's My Mate?** | New hires are assigned a task and told to find a partner. One person does not have a partner. Leaders facilitate a discussion about how it feels to be excluded. |
| **Scavenger Hunt** | New hires complete semi-guided tour of hospital by following scavenger hunt to locate various departments. |
| **Word Searches** | New hires complete puzzle with themes related to hospital policies, such as HIPAA, infection control, and customer service. |
| **Pictionary** | Leader uses the popular drawing game to teach patient rights to new hires. Recommended prompts include "obtain another doctor's opinion," "request copies of your medical record," and "refuse visitors or phone calls." |

### Alternatives to Lecture Format

| Format | Description |
|---|---|
| **Panel Discussion** | Expert panel presents orientation topics in Q&A format. |
| **Welcome Video** | CEO or other senior leader delivers message about hospital mission and discusses performance standards. |
| **Book Pass** | Chief nursing executive distributes signed copy of *Your First Year as a Nurse* (or other selected publication). |
| **Structured Networking** | Senior leaders attend 30-minute break during orientation, which provides an opportunity for new hires to network and informally learn about the institution. |
| **Online Learning Platform** | New hires complete orientation courses through online platform, typically covering regulatory topics such as HIPAA. |

# Tool #4: Step-by-Step Instructions for Creating Self-Guided Institution Tour

**Goal:** These step-by-step instructions equip HR staff to create a self-guided tour for new hires. The goal of the self-guided tour is to ensure all new hires know where important hospital departments are located and have a basic understanding of their mission.

**Estimated Time Required:** Approximately six hours for HR staff to create the self-guided tour and two hours for new hires to complete (often spread over several days).

**Additional Resources:** Printed hospital maps, "passport" (or interactive tour guide), stickers/stamps for each tour "stop."

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

| **Step 1** | **Select critical destinations for new hires** |

Identify the most important hospital departments for new hires to become familiar with. Focus on units and departments that employees will interact with frequently and those that patients most often need directions to.

**Examples:**

- Human Resources
- Admissions Office
- Surgery Department
- Physical Therapy

| **Step 2** | **Solicit descriptions from department leaders** |

For each selected department, ask the department leader to provide a short description of the department's mission. If needed, edit the description to ensure it doesn't contain jargon and can be understood by new hires.

**Example:** Operating Room
**Location**: First floor, down the hall from HR
**Description**: The OR is part of surgical services. Specialty services throughout this unit include thoracic and cardiovascular surgery, open heart surgery, ENT, plastic surgery, solid organ transplant, general surgery, minimally invasive surgery, bariatric surgery, orthopedics, neurosurgery, urology, and gynecology. The surgical department is highly regarded in the community because of the high standard of care for the patients and a cohesive, talented, and dedicated staff.

| Destination | Description |
|---|---|
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Source: Scripps Green Hospital, La Jolla, CA; HR Advancement Center interviews and analysis.

# Tool #4: Step-by-Step Instructions for Creating Self-Guided Institution Tour (cont.)

| Step 3 | Map tour stops on hospital map |
|---|---|

Highlight each selected department on a hospital map. These will be the required "tour stops" (or visits) for new hires on their self-guided tour.

| Step 4 | Assign ambassadors for hospital tour |
|---|---|

Assign "ambassadors" for each selected department. The role of the ambassador is to welcome new hires, explain the mission of the department, answer questions, and provide some proof of the new hire's visit (such as a stamp on their map).

We advise that you collaborate with the managers of the departments that are included on the tour to develop a short list of talking points for ambassadors (often unit secretaries) to review with new hospital employees completing their tour. Explain the purpose of the interactive tour to ambassadors.

**Potential department ambassador talking points:**

- Brief history of department
- Overview of department's interaction with patients (if applicable)
- Overview of department's interaction with other units/departments

- Primary department contacts
- Upcoming department events
- Anticipated department changes

| Step 5 | Draft new hire self-guided tour map |
|---|---|

Create a self-guided institution map or "passport" to orient new hires as they visit selected tour stops. The passport should include the selected destinations to visit from Step 3, a description of each tour stop, and an area for units/departments to stamp or mark each employee's booklet.

**Sample Passport**



| Step 6 | Distribute tour materials during orientation |
|---|---|

Distribute hard copies of the hospital map and the passports to new hires during orientation, instructing them to finish their tour within your desired time frame and turn in the completed passports to their direct managers.

# Tool #5: Executive-New Hire Group Discussion Guide

**Goal:** This discussion guide prepares executives to facilitate a conversation with a group of new hires. The main focus of this discussion is to have a candid conversation about the challenges new hires are likely to face as a natural result of being in a new job and environment and to brainstorm strategies for overcoming them. This conversation should also provide new hires with a deeper understanding of the organization's mission.

While having a member of the executive team facilitate the discussion carries strong signal value and denotes a commitment to new hire onboarding, this session can also be successfully facilitated by an HR manager or new hire support coordinator.

**Estimated Time Required:** One hour.

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

## Discussion Guide

*Hello, I'm [name], the [position title]. I want to welcome you to our hospital and thank you all for spending time with me today. The purpose of this session is to explore your expectations of the upcoming year and to think together about how to bridge the gap between your expectations and the often challenging reality of the first year on the job. Today's session—no more than an hour in length—will cover four main points: the ideal first year, potential challenges, personal coping strategies, and hospital resources.*

> The goal of this introduction is to clarify the purpose of this discussion, namely to discuss challenges and highlights of first year of employment and review the institution's mission and values.

### Introduction

1. Imagine an ideal first year on the job. What are you looking forward to the most?

2. What do our mission and values mean to you? How might you incorporate them into your own work?

> The goal of this section is to encourage new employees to think about how they can advance the hospital's mission and values through their daily work.

### The Ideal First Year

3. No matter where you work, the first year in a job is naturally a challenging time. What are some of the reasons that the first year can be difficult? (Loneliness? Lack of social support? Unfamiliar environment? Steep learning curve?)

4. What do you expect to be the most difficult or challenging aspect of your first year? (Learning your way around? Learning hospital procedures? Dealing with patients?)

> The executive should encourage participants to envision potential challenges they might face in the coming year. If conversation is lagging, they can prompt the group with some of the suggested challenges here.

### Personal Coping

5. Think again about some of those challenges you're going to face across the next several weeks and months. What steps can each of you take to make a difficult time more positive and bearable?

6. I'd like each of you to take a few minutes and write down three actions you will take to minimize the negative aspects of transitioning to your new job.

> The goal of this section is to help new employees identify actions to overcome the anticipated challenges.

Source: Deliver the Promise, Inc., Tiburon, CA; HR Advancement Center interviews and analysis.

# Tool #5: Executive-New Hire Group Discussion Guide (cont.)

7. Now, let's share some of your ideas with the rest of the group.

**Hospital Resources**

8. We're committed to making your experience a positive one, and we recognize that the hospital has a large role to play in easing your transition. Let me tell you about some of the resources we'll provide over the next several months. *[List your institution's resources.]*

9. Finally, I want to let you know that I and other senior leaders care about your experience as an employee, and my door is always open to hear your concerns. You also have a great resource in [*HR new hire contact*], and he/she is always available if you need to talk.

> Executives should emphasize their institution's commitment to retaining employees and provide any resources HR has to ease the first-year transition.

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# Tool #6: HR-New Hire Discussion Guide for 30-Day Check-Ins

**Goal:** This discussion guide equips HR leaders (or the designated new hire support coordinator) to hold meaningful 30-day check-ins with new hires. The goal is to establish the leader as a resource, surface new hires' concerns, and assess a department's onboarding performance.

**Estimated Time Required:** 20 to 30 minutes.

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

## Discussion Guide

**Capture Critical Background Information**

1. What department do you work in?
2. (*If applicable*) What unit are you assigned to?
3. What shift do you work on?
4. Are you coming to us straight from school or do you have prior work experience? Tell me about that.

**General Questions**

5. What college did you attend? What year did you graduate?
6. Have you ever worked at [Institution] in the past? In what position?
7. What brought you to [Institution]?

**Early Institution Experience**

8. What are your greatest fears about being a new [position title] at [Institution]?
9. How would you describe your workload at this point? Tell me about any times when you have felt overwhelmed.
10. (*If applicable*) What can we provide for you to make this transition from new graduate to practicing professional a better experience?
11. (*If applicable*) How could we improve the transition from experienced [position title] coming into [Institution]?

**Early Department Experience**

12. Have you felt included and integrated into your department so far? What have your manager and colleagues done to make you feel that way?
13. What has your manager done to support you and your work so far?
14. (*If applicable*) Tell me about your relationship with your preceptor.
15. Where do you see yourself professionally in a few years?

# Tool #7: Administrative Director-New Hire Discussion Guide

**Goal:** This discussion guide equips senior leaders to hold meaningful conversations with new hires. Senior leaders should aim to meet with new hires between 30 and 60 days of employment. The goal of this conversation is to inform the new hire about the department's business plan and performance, reinforce the institution's goals and missions, and introduce them to a senior-level advocate. In addition, the discussions help directors audit manager compliance with onboarding elements and provide frontline perspective on department performance.

**Estimated Time Required:** 20-30 minutes per discussion.

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

## Discussion Questions

*Before beginning the formal discussion, senior leaders should share information on the following topics with new hires: department news (including updates on future growth or any ongoing initiatives), fiscal year operating plan, unit fundamentals, recognition and celebration opportunities, and the department onboarding schedule.*

1. Do you have any questions about the information I just shared with you?

2. Describe your biggest frustration to date.

3. Tell me about your interactions/communications with your manager.

   a. Did your manager contact you prior to your start date?

   b. Did your manager meet with you at the end of the first week? first month?

   c. Do you feel your manager has made your role expectations clear?

4. (*If applicable*) Has your peer/mentor been in touch with you to schedule a meeting?

5. Do you feel you have the resources to do your job? What additional resources would be helpful?

6. How would you describe your current level of job satisfaction?

7. What can we do to improve your experience?

8. Is there anything else I can do for you? I want make sure you are supported in your work.

# Tool #8: Guidance on Building a New Hire Onboarding Survey

> **Goal:** The steps below equip HR staff to design a new hire survey that efficiently and effectively assesses the impact of their institution's onboarding program.
>
> **Estimated Time Required:** 3 hours to develop the survey; approximately 1 hour per month to analyze results.
>
> **Additional Resources:** IT support to develop online survey instrument (if institution has homegrown survey tool); otherwise, access to survey website such as SurveyMonkey.
>
> **Available Online:** To access an editable version of this guide, please visit advisory.com/hrac/newhireonboarding.

## New Hire Survey Audit

The questions below are designed to help you quickly identify opportunities for improving the effectiveness of your institution's new hire onboarding survey.

If your institution does not currently have an onboarding survey, turn to page 20 for a starter list of recommend questions.

If your institution has a survey, use the questions below to identify potential opportunities to increase your survey's effectiveness. If you identify improvement opportunities, the step-by-step guide starting on page 22 walks you through the process of adding additional questions and piloting your new or updated onboarding survey.

| Desired Survey Element | Rationale | Current Component of Survey? | |
|---|---|---|---|
| **Collects Only Most Critical Demographic Information** | • Enables HR to target intervention to departments where new hires need better onboarding support<br>• Provides operational leaders with department-specific survey results | Yes | No<br>(See step 1) |
| **Seeks Feedback on Specific Onboarding Events** | • Provides specific new hire feedback on onboarding program elements<br>• Helps HR leaders develop targeted action steps to enhance engagement by refining onboarding program | Yes | No<br>(See step 2) |
| **Limited Number of Questions** | • Decreases survey fatigue and increases response rate<br>• Shorter tools especially critical for surveys administered multiple times | Yes | No<br>(See step 3) |
| **Questions Phrased for Likert Scale Responses** | • Ensures all responses use same answer scale and can be easily compared | Yes | No<br>(See step 4) |
| **Captures Longitudinal Data** | • Pinpoints period in which new hires at greatest risk of becoming disengaged<br>• Facilitates ongoing refinement of onboarding program by enabling crosswalk of timing of onboarding program elements to new hire engagement | Yes | No<br>(see Step 5) |

Source: HR Advancement Center interviews and analysis.

# Tool #8: Guidance on Building a New Hire Onboarding Survey (cont.)

## Sample Onboarding Survey Questions

If your institution does not currently administer a new hire survey, we recommend starting with the questions below.

If you would like to add additional questions, use the step-by-step guide starting on page 22 to develop additional questions for your new hire onboarding survey.

**Note:** The far-right columns indicate the time frame in which each question should be asked. The first six questions gauge how prepared new hires felt on the first day and their opinion of the institution's orientation program; they should only be asked the first time this survey is administered.

| Statement | 30 Days | 60 Days | 90 Days |
|---|---|---|---|
| I felt prepared for my first day of work. | X | | |
| When I started work, I had the equipment/supplies I needed to do my job. | X | | |
| New employee orientation made me feel welcome. | X | | |
| New employee orientation gave me the information I need to do my job. | X | | |
| New employee orientation helped me understand this institution's mission and values. | X | | |
| Within one week of starting work on my department, I had a helpful meeting with my manager or supervisor. | X | | |
| Across the last [time period], the actions of executives in my organization have reflected our mission and values. | | X | X |
| Across the last [time period], my direct supervisor or manager has stood up for the interests of my department. | | X | X |
| Across the last [time period], I have had helpful discussions with my direct supervisor about my role. | | X | X |
| Across the last [time period], I have had helpful discussions with my direct supervisor about my career. | | X | X |
| Across the last [time period], I have had good personal relationships with coworkers in my department. | | X | X |
| Department orientation gave me the information I need to do my job. | | X | X |
| I have received helpful feedback on my performance. | | X | X |
| I feel welcomed by employees on my department. | | X | X |

Source: HR Advancement Center interviews and analysis.

# Tool #8: Guidance on Building a New Hire Onboarding Survey (cont.)

| Statement | 30 Days | 60 Days | 90 Days |
|---|:---:|:---:|:---:|
| Employees in my department are friendly. | | X | X |
| I have made friends with other new employees. | | X | X |
| When I have questions about my job, I receive helpful answers. | | X | X |
| I have had a meaningful opportunity to meet senior leaders. | | X | X |
| I have been assigned a helpful buddy from my department. | | X | X |
| My assigned buddy has made me feel welcome. | | X | X |
| Events for new hires have helped me get to know other new employees. | | X | X |
| Events for new hires have helped answer my questions. | | X | X |

Source: HR Advancement Center interviews and analysis.

# Tool #8: Guidance on Building a New Hire Onboarding Survey (cont.)

## Steps for Building (or Refining) an Onboarding Survey

| Step 1 | Include only strategically important demographic questions |
|---|---|

To keep the survey short, ask a limited number of demographic questions. You will want to focus on demographic information that will allow you to further focus your onboarding efforts (such as by department or tenure).

**Sample questions:**

- Please select the length of time you have worked at [institution]
- Please select your current job title
- Please select the department you currently work in

| Step 2 | Select critical onboarding elements to ask about |
|---|---|

Determine elements of the onboarding experience (as distinct from individual onboarding classes) to be measured by the survey. The goal is to create a framework for the survey that will help HR pinpoint where to focus if survey results indicate intervention is necessary.

**Sample elements:**

- Department Orientation and Training
- Departmental Relations
- Position/Work Environment
- Organizational Values

| Step 3 | Develop discrete questions corresponding to specific onboarding events |
|---|---|

Develop a brief list of questions that correspond to each onboarding element. It is critical to keep the survey a reasonable length. Ask after only the most important events. If HR administers this survey three times across the first three months of employment, then keeping the survey short will help alleviate survey fatigue.

**Example**

**Element**: Departmental Relations

**Questions**:

1. I feel welcomed by employees on my department.
2. I have made friends with other new employees.
3. I have been assigned a helpful buddy from my department.

Source: HR Advancement Center interviews and analysis.

# Tool #8: Guidance on Building a New Hire Onboarding Survey (cont.)

| Step 4 | Frame questions for Likert scale responses |
|---|---|

Frame survey questions so they can be answered with the same answer scale. This means all questions must be consistently written as all positive (or all negative) and use identical language when describing identical concepts.

**Example**

**Element:** Department Orientation and Training

**Questions:**

1.  I received excellent orientation to my department.

❑ Strongly Agree ❑ Agree ❑ Tend to Agree ❑ Tend to Disagree ❑ Disagree ❑ Strongly Disagree

2.  I received excellent training to do my job effectively.

❑ Strongly Agree ❑ Agree ❑ Tend to Agree ❑ Tend to Disagree ❑ Disagree ❑ Strongly Disagree

> Statements framed in the positive and use parallel language and structure

| Step 5 | Determine survey collection intervals |
|---|---|

Determine appropriate intervals for survey collection. Our research suggests that best-practice institutions survey employees multiple times across their first year of employment using the exact same question set. This can help HR pinpoint onboarding periods that are critical to new hire retention. Furthermore, administering the same survey across multiple start groups allows HR to track the impact on new hire onboarding over time.

**Sample survey intervals:** 30 days post-start date, 60 days post-start date, 90 days post-start date.

| Step 6 | Build the survey |
|---|---|

Build the survey in an online survey instrument. Institutions can use an online tool such as SurveyMonkey or a homegrown survey instrument if they have one. If necessary, reach out to the IT department to coordinate the survey. (Note that if you use SurveyMonkey, you can build, deploy, and analyze the survey independently.)

| Step 7 | Pilot the survey |
|---|---|

Pilot survey with a small number of new hires. Adjust the questions and interface if survey participants are uncertain what is being asked or have concerns about survey length, confidentiality, etc.

Source: HR Advancement Center interviews and analysis.

# Tool #8: Guidance on Building a New Hire Onboarding Survey (cont.)

| Step 8 | Analyze survey data |
|---|---|

Analyze survey data to evaluate onboarding performance. Consider filtering the data in the following ways:

- Unit or department
- Onboarding period
- Respondent tenure
- Job title

| Step 9 | Improve onboarding program based on survey findings |
|---|---|

Apply the survey's findings to your facility's overall onboarding program. You may want to prioritize your efforts on new hires who are the least satisfied, or costliest to replace, or in the departments with the greatest improvement needs.

# Tool #9: Assessing Available Resources for New Hire Mentorship Program

> **Goal:** This exercise will help HR leaders assess if their institution has sufficient time and resources to implement a new hire mentorship program. We recommend that institutions implement mentorship programs (rather than new hire buddy programs) only when the resources necessary to support a mentorship program's more structured schedule and longer duration are available. If sufficient resources are not available for a mentorship program, please see Tool #10: Steps for Implementing a Buddy Program on page 26 for guidance on building a new hire buddy program.
>
> **Time Required:** 10 minutes.
>
> **Related Tools:** Tool #10: Steps for Implementing a Buddy Program (page 26) and Tool #12: New Hire Mentor Role Description (page 29).

| Part 1 | Institutional prerequisites for mentorship program | Yes | No |
|---|---|---|---|

1. Can significant HR staff time—approximately 0.2 FTE—be dedicated to owning and overseeing a mentorship program? Primary responsibilities include: ☐ ☐

   - Leading initial mentor training session (approximately two hours, six times per year).
   - Conducting ongoing coaching of mentors (approximately 2.5 mentors per department).
   - Facilitating quarterly best-practice meetings (approximately one hour in length).
   - Monitoring program efficacy (ongoing review of mentor spending, new hire surveys, and qualitative feedback on mentor performance).

2. Are there enough new hires in the units/departments that would participate in the program that each mentor could be assigned to more than one new hire? ☐ ☐

**STOP:** Proceed to the next section only if answering "yes" to both questions above. If you answered "no" to either question, your institution is currently not well positioned to support a mentor program and we recommend adopting a buddy program instead. (For more information on building a buddy program, see Tool #10: Steps for Implementing a Buddy Program on page 26.)

| Part 2 | Additional considerations for mentorship program | Yes | No |
|---|---|---|---|

3. Is there a sufficient pool of highly motivated, tenured employees (emerging leaders) who can serve as mentors? (You'll need at least two to three per department.) ☐ ☐

4. Is staff scheduling sufficiently flexible to accommodate one-hour monthly mentor meetings with all new hires within each department? ☐ ☐

5. Are minimal financial resources available ($600 to $800 per department per year) to fund mentor project time and retention activities (approximately three hours per month)? ☐ ☐

If you answered "yes" to two or more questions in this section, consider implementing a mentorship program. (See page 29 for a new hire mentor role description.) If you answered "no" to two or more questions, we recommend adopting a buddy program instead. (For more information on building a buddy program, see Tool #10: Steps for Implementing a Buddy Program on page 26.)

Source: HR Advancement Center interviews and analysis.

# Tool #10: Steps for Implementing a New Hire Buddy Program

> **Goal:** These steps will equip HR staff to build a successful new hire buddy program. The goal of a buddy program is to provide new hires with a designated peer who can help answer technical questions and orient the new hire to organizational culture.
>
> **Related Tools:** Tool #11: New Hire Buddy Commitment Card (page 28).

| **Step 1** | **Review characteristics of buddy program** |
|---|---|

- Review the characteristics of successful buddy program (listed below). This table can be used as a training tool for new hire buddies.
- **Time Frame:** Review prior to building buddy program.

| Human Resources

| Meetings | Interaction Focus | Relationship Length | Training Required | Ratio to New Hires |
|---|---|---|---|---|
| Ad hoc | One-off advice, office tasks | <1 year | 1-2 hours | One new hire per buddy |

| **Step 2** | **Recruit buddies** |
|---|---|

- Department managers—with input from HR—recruit volunteers to serve as buddies.
  - o Buddies should have at least three months tenure and be in good standing.
  - o There should be at least one buddy on every unit.
- **Time Frame:** Ongoing.

| Human Resources and Department Managers

| **Step 3** | **Train buddies** |
|---|---|

- Train buddies on role and responsibilities using the buddy program characteristics and commitment card (page 28).
- Ask buddies to sign the Buddy Commitment Card (page 28) at end of training.
- **Time Frame:** Ongoing (up to two hours per buddy); for efficiency, training should be conducted in small groups.

| Human Resources

Source: Danbury Hospital, Danbury, CT; HR Advancement Center interviews and analysis.

# Tool #10: Steps for Implementing a New Hire Buddy Program (cont.)

| Step 4 | Match buddies and new hires |
|---|---|

- Match buddies and new hires together.
  - o Buddy should be in same role and department as the new hire they are paired with.
- **Time Frame:** One week prior to new hire's start date.

| Department manager

| Step 5 | Initial buddy-new hire meeting |
|---|---|

- Buddy arranges initial 30-60 minute meeting with new hire.
  - o This initial meeting is an opportunity for candid conversation about the job responsibilities, organizational culture, etc. There is no need for scripting or a discussion guide.
- **Time Frame:** During new hire's first week of employment.

| Buddy

| Step 6 | Schedule ongoing check-ins |
|---|---|

- Allow buddies time for regular 15-30 minute meetings with new hires. Buddies and new hires should meet weekly for first three months, then monthly.
- **Time Frame:** Ongoing throughout first year of new hire's employment.

| Buddy

| Step 7 | Organize buddy recognition event |
|---|---|

- HR arranges event to recognize and thank buddies for participation in program.
- **Time Frame:** Annually.

| Human Resources

| Step 8 | Assess program impact |
|---|---|

- New Hire Support Coordinator (or another relevant staff member) evaluates impact of buddy program.
  - o This can be done via onboarding surveys (see page 19), focus groups, or one-on-one interviews.
- **Time Frame:** Solicit new hire input six months after new hire's start date.

| Human Resources

Source: Danbury Hospital, Danbury, CT; HR Advancement Center interviews and analysis.

# Tool #11: New Hire Buddy Commitment Card

**Goal:** This commitment card describes the key responsibilities of the new hire buddy role. Department managers ask each new hire buddy to sign this card when they initially volunteer.

**Related Tools:** Tool #10: Steps for Implementing a Buddy Program (page 26).

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

## Buddy Commitment Card

**As a Buddy, I commit to the following tasks:**

- Preparing my department's welcome packet

- Contacting the new hire as soon as possible upon his or her start date

- Sharing a meal break together during the second week of employment

- Checking in with the new hire at least every other week for his or her first six months

- Helping the new hire understand and adapt to hospital and department culture

- Providing basic assistance about how to navigate essential office resources (e.g., timesheet, copy machine, important people to know)

- Providing information about the local community, such as referrals for dentists, doctors, mechanics, and places of worship

- Being a friend when a friend is needed

Signed:_____

# Tool #12: New Hire Mentor Role Description

> **Goal:** This tool outlines the qualifications for new hire mentors and the responsibilities associated with the role. HR should circulate the job description to potential mentors and post it to the institution's intranet for employees to review. HR should make clear that the mentor's primary job responsibilities remain the same as other professionals who share his or her job title, except for the additional focus on providing assistance to new hires.
>
> **Additional Resources:** Some institutions are able to compensate mentors for their time dedicated to mentoring (up to three hours per month); for easy identification, mentors are often given an easily identifiable token such as an ID badge holder pin or lab jacket.
>
> **Available Online:** To access an editable version of this job description, please visit advisory.com/hrac/newhireonboarding.

## Characteristics of a Successful Mentorship Program

This table provides an overview of the new hire mentor responsibilities. HR should review this table prior to establishing a mentor program. It can also be used as a training tool for mentors.

| Meetings | Interaction Focus | Relationship Length | Training Required | Ratio to New Hires |
|---|---|---|---|---|
| Structured, scheduled (at least once a month) | Career path, hospital norms, start-group camaraderie | 2-3 years | 2-3 hours, plus quarterly best practice meetings with other mentors | More than one new hire per mentor; institutions may also organize a group of new hires into a cohort led by multiple mentors |

## Mentor Role Description

**I.     Purpose**

The mentor is an experienced [position title] responsible for providing new [position title]s with a solid foundation for independent practice, improving new hires' integration into the department and the organization, and assisting with the new [position title]s' personal and professional growth for the first three years that they are at [Institution].

**II.     Qualifications**

The minimum qualifications of the [position title] for consideration as a mentor are listed below. These qualifications should be reviewed and evaluated annually in a joint effort between the HR manager and the department manager.

**III.     Mentor Characteristics**

1. Employed at [Institution] for a minimum of two years; however, the department manager may decide an employee is ready for this role sooner.
2. Job performance rated "good" (or above), with strong interpersonal skills and role-modeling behaviors. The mentor should demonstrate professional expertise in the department and have the desire to share his/her skills and knowledge with others.
3. Interest in the mentor role.
4. Flexibility in his/her work schedule to meet mentor program needs and contact with new hires.
5. Passion for his/her profession.
6. Ability to maintain confidentiality.

# Tool #12: New Hire Mentor Role Description (cont.)

**IV. Role Expectations**

1. Participate in scheduled new hire support program activities to help promote program growth, as well as personal and professional growth for himself/herself and new hires.

2. Plan mentor meetings; if group meetings not possible, mentor should check in frequently one-on-one with new hires to ensure they feel supported in the transition onto the department and into the organization.

3. Document mentor meetings and one-on-one mentoring moments.

4. Maintain good communication with the department manager, the [new hire support coordinator/HR manager], and the new hires; in addition, proactively bring issues forward for resolution.

**V. Role Objectives**

1. Provide assistance for a designated period to [position title]s who are new to [Institution].

2. Supplement the orientation program, helping new graduates and experienced [position title]s adjust to their role at [Institution], with a focus on non-clinical issues that affect job adjustment and satisfaction.

3. Help improve retention of new [position title]s by identifying issues and concerns early that can cause [position title]s to leave, and by helping new hires adjust to their department and the organization.

4. Offer new hires unconditional support and an opportunity to work in a culture of support.

5. Equip new hires with a solid foundation for independent practice.

6. Serve as a role model for new hires to help them develop positive traits such as leadership skills, discipline, hard work, job dedication, honesty, persistence, tactfulness, dignity, and respect.

7. Act as an exemplar of [Institution]'s mission and values while teaching service excellence skills.

8. Give additional support to the department manager as an integral part of the unit "retention team."

advisory.com

# Tool #13: New Hire Support Coordinator Job Description

**Goal:** This tool outlines the role of the New Hire Support Coordinator, a position created to offer one-on-one support to new hires, oversee clinical onboarding and orientation, consult with managers to address turnover problems, and administer the mentor program. In addition to describing general duties, the tool delineates the coordinator's specific responsibilities regarding contact with new hires across their first three years of employment.

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

**Defining Our Terms:**

- **Stay Interview**—A one-on-one resignation recovery meeting between the new hire support coordinator and a new hire who is considering leaving (which takes place before the formal resignation).

- **Retention Roundtable Meeting**—Meeting of first-, second-, and third-year hires to discuss onboarding successes, problems, and trends; roundtable findings are presented as a formal report with an action plan and distributed to senior executives, nursing leadership, and new hire mentors.

- **Retention Conference**—An in-house conference that is open to all employees; national speakers present on topics driven by employee feedback.

- **Mentor Meetings**—Unit-based meetings involving mentor teams and mentees.

## I.    Position Purpose

The New Hire Support Coordinator promotes, facilitates, and provides ongoing development of the mentor program, provides education to improve new hire integration, facilitates enhancements to support systems and integration efforts, and acts as a link between Human Resources and new hires in support of organizational retention efforts.

## II.    Work Experience

Three to five years of experience in/with intermediate or critical care, leadership, problem solving, and relationship building. Self-direction, creativity, and a strong ability to communicate with people individually and in groups is required.

## III.    Performance/Technical/Clinical Requirements

1. *Promote, facilitate, and provide ongoing development of the Mentor Program*
   - Facilitate identification and selection of mentors
   - Provide mentor education
   - Role model a "mentoring culture" by mentoring the mentors
   - Track and record key program metrics for reference and data reporting/analysis

2. *Identify new hire adjustment problems and facilitate interventions*
   - Establish initial relationship with new hires, maintain visibility through rounding
   - Conduct 30-day check-in meetings and "stay" interviews as requested by managers
   - Support managers as Chief Retention Officers
   - Facilitate new hire transfers due to "fit" issues

3. *Support organizational retention efforts*
   - Serve as a link between Human Resources and new hires
   - Conduct exit interviews and report data

- Conduct Retention Roundtables meetings and surveys, using data for action plan development
- Track and report mentor program retention and turnover rates
- Engage in ongoing communication with the CNO, Senior Vice President of Human Resources, nursing administration, Director of Human Resource Development and Retention Services, retention/recruitment consultant, and recruiters

**IV. Coordinator-New Hire Contact Responsibilities**

*1. Year One*
- Participate in recruiting process
- Introduce onboarding program in general orientation and schedule initial check-in meetings with all new hires to take place within first three to four weeks of employment
- Schedule additional check-ins with new hires who have "red flags"
- Visit new hires as needed
- Send letter to new hires at three months, six months, and nine months
- If applicable: Present book *Your First Year as a Nurse* (or selected publication)
- Complete weekly rounding on units
- Conduct "stay interviews" as requested
- Coordinate "Retention Roundtables" at the end of new hires' first year
- Encourage new nurses to participate in a clinical ladder (if relevant)

*2. Year Two*
- Send letter to hiring cohort at 18 months and 21 months
- Distribute Retention Roundtable Survey at the end of hiring cohort's second year
- Complete weekly rounding on units
- Conduct "stay interviews" as requested
- Visit new hires as needed on unit or by appointment
- Coordinate shadowing experiences for new hires to advance their professional growth at [Institution]
- Promote participation on unit-based and organizational committees

*3. Year Three*
- Send letter at 30 months and 33 months
- Distribute Retention Roundtable Survey at the end of new hires' third year
- Complete weekly rounding on units
- Conduct "stay interviews" as requested
- Visit new hires as needed on unit or by appointment
- Coordinate shadowing experiences for new hires to advance their professional growth at [Institution]
- Promote participation on unit-based and organizational committees

*4. General*
- Attend unit-based mentor meetings upon request
- Attend two retention conferences per year
- Attend the Mentor Meetings
- Participate in retention focus groups as needed with tenured staff and new hires
- Conduct exit interviews and send follow-up letters to employees who have left the organization but would be welcome to return

Source: Methodist Medical Center of Illinois, Peoria, IL; HR Advancement Center interviews and analysis.