Your **TOOLKIT** for a powerful **ONBOARDING** experience

Onboarding: The action or process of integrating a new employee into an organization.
Onboarding is a critical point in the employee lifecycle. A solid program not only bridges the gap between candidate experience and employee experience, it acts as a catalyst for employee satisfaction and retention.

To help you succeed in making a powerful first impression, we’ve created this onboarding toolkit. From inspiring examples to practical guides, this toolkit is full of essential resources for every stage of your new hire process.

Make the first interactions with new employees count, and become a more productive and successful team.

* Bersin by Deloitte’s industry study: Onboarding Software Solutions 2014: On-Ramp for Employee Success

You never get a second chance to make a first impression.

4% of new hires leave a job after a disastrous first day and 22% of turnover occurs within the first 45 days - Costing the company at least 3X the former employee’s salary.*
WHAT’S IN THE TOOLKIT?

PRE-BOARDING PACKAGE
Best Boss Ever - Prep Checklist
Welcome Email Sample

FIRST MONTH ESSENTIALS
Best Boss Ever Checklists

MEASURE YOUR SUCCESS

FIRST QUARTER TOOLS
Best Boss Ever Check-In Questions

PARTING THOUGHTS

The resources provided here are intended to be interactive and personalized.
Pre-Boarding Package

One of the most important and often overlooked steps is pre-boarding. It’s the introduction to the full onboarding experience. Not only does it increase new employees’ excitement, but it also fosters a relationship with them before their first day.

So before your new employees arrive, do your homework with the following checklists and resources. From the basics to awesome extras, these things will help you identify ways to make them feel valued and welcome.

Also, don’t hesitate to engage with them before their first day. We included a sample email for you to customize and send to your new employees one week before they arrive. It’s a great way to communicate how excited you are for them to join, and also prepare them for success on day one.
Best Boss Ever Checklist

Pre-Boarding (before day one)

WELCOME and WAYFINDING
___ Create onboarding activity agenda for the 1st week (& outline 1st month)
___ Send welcome email to team re: new employee
___ Send “what to expect” email to new employee (including information about arrival, parking, dress code, lunch, etc.)
___ Print hard copies of important resources (presentations, agendas, reference guides)
___ Plan lunch for the first day w/team and/or supervisor
___ Plan/schedule employee introductions
___ Have team sign a welcome card
___ Assign an ambassador* to assist with questions and integration
___ Gather University/Health Care swag for new employee
___ Schedule a meeting outside the office to learn more about the employee

AWARENESS
___ Review job description, role and responsibilities:
   ___ Expectations
   ___ Possible initial performance goals
   ___ Role fit within UI strategy/big picture
   ___ Goals of the unit
___ Communicate with supervisees of new-hire
___ Schedule meetings with key contacts working within and outside the department
___ Plan tour of department, building and campus
___ Prepare list of common/frequent phone numbers
___ Order business cards
___ Confirm computer/file/drive access
___ Confirm door and building access
___ Update organizational chart & directory
___ Check with HR regarding required documentation that may still need to be completed (e.g., credentials, direct deposit, etc.)

IMPACT and DEVELOPMENT
___ Enroll in required courses and compliances
___ Consider training and professional development needs (leadership/supervisor-focused, if supervising)

* A department ambassador is someone who represents and talks about the department in a positive way. They are someone who embodies the mission/vision they are endorsing, and who assists in welcoming and orienting the new employee to the department or unit.

This checklist is intended for the supervisor to use in preparation for, and during, a new employee's onboarding in the department. There are some general as well as supervisor-specific items. Contact your HR Rep for additional tools, resources and materials for more unique needs.
Dear [First Name],

Welcome to the University of Iowa/UI Health Care, [Department]! We are excited to have you join our team, and we are preparing things for your first day. In addition to meeting your new colleagues, you will be attending a new employee welcome where you will learn more about this great place, including benefits and retirement savings information. Here’s what you need to know for your first day.

**Arrival**
I will meet you at ___________ (location) at __________ (time).

**Parking**
I will accompany you to get your parking permit on your first day, if you need one. Until you get your permit you can park _______________________________. If you are taking public transportation, the closest bus stop is at _____________________. Below is a link to a campus map that may be helpful.
[link]

**Items for Day One**
- Welcome breakfast with colleagues
- Workspace set-up and bearings
- Meet with HR for Q&A - discuss benefits, retirement, employment classification and status, etc.
- Building and campus tour
- Lunch with me
- Review onboarding schedule for week 1 and first 30 days
- Discuss professional development, performance, expectations
- Discuss goals, current projects/work already underway, upcoming projects and assignments
- Q&A with me

**What to Bring**
- Information for completing direct deposit [link]
Put a #Hashtag on it!
Ready to show some early Hawkeye pride? Share your excitement with the social networks you use most by using a UI hashtag #uiowa, or #itsgreattobeahawkeye. We can’t wait to see your posts!

Get Connected!
Make connections and learn more about the great things happening at Iowa by following our LinkedIn page - https://www.linkedin.com/school/university-of-iowa/. You’ll find out why we are so proud to work here!

We are looking forward to your arrival! If you have questions before your first day, you can reach me at _________________ or _________________. 
“People, not structures, make a great university.”

– Former UI President, Willard "Sandy" Boyd
First Day Experience

New employee orientation and onboarding can be stale. Give your new employees an amazing first impression of their new job with an interactive and fun first day.

Start with something social. This will help them start the process of getting connected with coworkers and colleagues, and is more dynamic than having them read manuals or web content. Avoid death by meeting or PowerPoint with team-oriented activities, discussions, and lively videos and tours to build relationships and engagement. We know everyone wants a piece of the new employees on day one, but focus the first day (or week) on experiential learning and you’ll make a greater impact.

At the end of the first day, ask what else the new employee might want before they come back for day two.

You might even consider giving them a book or article or web resource that you can discuss with them to get things rolling the next day.
Welcome!

We’re thrilled to have you on board! This guide has all the company information you’ll need as a new employee. It’s interactive, so dive in, click and explore what makes The University of Iowa unique, the resources available to you, and answers to frequently asked questions.

About the University
https://uiowa.edu/about

Diversity, Equity, and Inclusion at Iowa
https://diversity.uiowa.edu/

Meet our President
https://president.uiowa.edu/message-president-bruce-harreld

See what’s happening in Iowa Now
https://now.uiowa.edu/

Learn how we impact students & patients
https://uiowa.edu/stories/student-outcomes
https://uiowa.edu/health-care

EVENTS CALENDAR

Get Involved
https://events.uiowa.edu/?f=6671

Feeling Perky?
https://hr.uiowa.edu/benefits/benefits-overview/employee-discount-program

Invest in Your Health
https://hr.uiowa.edu/employee-well-being

Grow and Develop
https://hr.uiowa.edu/development/learning-and-development
What's the dress code?
Dress codes vary depending on the department and function. Check with your department and supervisor for specific work attire expectations.

What are basic work expectations?
Every department will set role and function-specific work expectations for their area. You can also find standard UI Work Rules here. This covers general rules on work performance, attendance and punctuality, use of property, personal actions and appearances, and outside activities and employment.

What are some things I should do in my first month?
Check out our Onboarding website to keep up on important things you should know, do, and consider in your first weeks, months and year.

How and when do I enroll in benefits/insurance?
All new to UI and UI Health Care employees are automatically enrolled in a New Employee Welcome. Check with your supervisor and your campus mail if you haven’t received the invitation yet. There is a helpful benefits section during this welcome and you can follow-up with an online enrollment form through Self Service. Also, feel free to visit the Employees Benefits page for more information.

How do I get a parking pass?
You can sign up for a parking permit on a UI lot through from Parking and Transportation. You will need your HawkID and password to order a permit. Before you complete this process, you should get in touch with your hiring manager.

What are recognized UI Holidays?
You can find information on personal leave time and holidays on the UI HR webpages or the Operations Manual.

How can I get help with career development?
The University of Iowa offers career opportunities in diverse fields and locations. You may reach out to your department HR Representative or supervisor for professional development information, or check out the career resources here.

Who should I contact if I have a leave (or medical) question?
It's highly recommended to make contact with your department HR Representative and supervisor as soon as you know you may or will have a need for leave, personal or medical, in particular when it is expected to be 3 or more consecutive days or intermittent over a period of time. You may contact Faculty and Staff Disability Services for more on medical leave.

FIND ADDITIONAL RESOURCES AT LIVING & WORKING @ IOWA.
First Month Essentials

While “First Day” items covered the basics, new employees will need a refresher as well as even more information during their first month on the new job. The university's onboarding website (https://hr.uiowa.edu/careers/new-employee-onboarding) has even more resources and information to support new employees . . . and their supervisors.
Best Boss Ever Checklist

Their First Two Weeks

WELCOME and WAYFINDING
___ Provide agenda for first two weeks
___ Attend lunch first day with employee and team
___ Provide schedule of meetings and appointments
___ Provide welcome card signed by colleagues
___ Introduce to ambassador to assist with questions
___ Provide department/UI swag
___ Have a meeting outside the office to learn more about the employee
___ Parking – lot, hang tag, departmental business placard
___ Break room/kitchen
___ Phone and email system set up/voice mail
___ Bathrooms
___ Provide applicable keys/access card
___ Conference rooms
___ First aid kit & Emergency supplies
___ Copier/fax machines/recycle/shred bins
___ Department computer shared drive
___ Campus map
___ Secure area for personal belongings
___ Supplies/mail

AWARENESS
___ Review job description, job role and responsibilities:
    ___ Expectations (dress code, breaks, work schedule, office practices)
    ___ Probationary period
    ___ Initial performance goals
    ___ Role fit within UI strategy/big picture
    ___ Goals of the unit
___ Organizational chart review
___ Provide job descriptions of direct reports
___ Review Employee Self Service
___ Payroll/W-2
___ Direct deposit
___ Emergency contact information
___ Time/absence recording
___ Hawk Alert
___ Performance management
___ Benefits enrollment
___ HR policy review
___ Paid absences (vacation, sick etc.)

This checklist is intended for the supervisor to use in preparation and during the initial onboarding of a new supervisor in the department. There are some general as well as some supervisor specific items. Contact OE or your HR Rep for additional tools, resources and materials for more unique needs.
___ FMLA/Leave of absence
___ Holidays/Overtime
___ Attendance policy
___ Health and Wellbeing
   ___ LiveWELL
   ___ Family Services
   ___ Employee Assistance Program
___ Schedule 1:1s, as appropriate
___ Provide department staff directory

IMPACT and DEVELOPMENT
___ Departmental orientation (if applicable)
___ Confirm UI/UI Health Care orientation
___ Communicate department practices
___ Provide business cards
___ Discuss training & development activities for role and of personal interested (see L&D website)
___ Navigate online resources, basic UI webpages (browser favorites), onboarding & handbook
___ Get Iowa One Card
___ Provide list of key contacts within department and across campus

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Best Boss Ever Checklist

Their Third and Fourth Weeks

WELCOME and WAYFINDING
___ Introductions to department leadership and/or campus colleagues/collaboration partners
___ Check in with department ambassador on how new employee is doing
___ Have a meeting focused on feedback from the new employee on their experiences so far
___ Provide feedback on how first two weeks are going and plan for next two to six weeks
___ Parking hangtag and departmental business placard for campus meetings requiring driving
___ Campus/Iowa City – map and/or Q&A

AWARENESS
___ UI policy review (suggestions below)
___ Sexual harassment prevention
___ Violence
___ Confidentiality
___ Health & safety and workplace safety
___ Conflict of interest
___ Ethics and Responsibility
___ Email & internet Use
___ Inclement weather
___ Drug free environment
___ Human rights policy
___ Disability protection policy
___ Anti-retaliation policy
___ Academic policies & procedures
___ Employee Self-Service - Supervisor Duties
    ___ Approving absence requests for direct reports
    ___ Monitoring compliances of employees
    ___ Performance evaluation process and timing
    ___ E-personnel file overview
    ___ First Report of Injury (workers’ compensation practices)
    ___ HR reports (what and frequency)
___ Required Training (as applicable):
    ___ Add training in Compliance & Qualifications system
    ___ Procurement card (ICON course) and policy
    ___ Travel – setting up trips and role of University Shared Services
    ___ FERPA (ICON course) and policy
    ___ Harassment Prevention class (online or in person)
    ___ Performance reviews
___ Performance Management
    ___ Investigation & disciplinary process
    ___ Grievance process
    ___ Collective Bargaining - Weingarten rights (if applicable)
___ Overview of Key Offices on Campus
    ___ Organizational Effectiveness/Learning & Development
    ___ Employee & Labor Relations (ELR)
    ___ Equal Opportunity & Diversity (EOD)
Best Boss Ever Checklist

Their Third and Fourth Weeks (continued)

___ Overview of Key Offices on Campus
    ___ Faculty Staff Disability Services (FSDS)
    ___ UI Employee Assistance Programs (EAP)
    ___ Office of the Ombudspersons
    ___ Public Safety
___ Schedule 1:1s with all direct reports
    ___ Discuss supervisor style and expectations
    ___ Discuss goals (status and future)

IMPACT and DEVELOPMENT
___ Discuss training and professional development opportunities
    ___ Review online options
        ___ Supervising@Iowa/Supervising Today’s Students
        ___ Self Service/My Training
        ___ Advanced Management Series
        ___ myquickcoach
        ___ Workshop series (Influencer, Strengths, Leading at the Speed of Trust, etc.)
        ___ LinkedIn Learning
        ___ UI Lead/Executive Leadership Academy (ELA)
        ___ ICON
        ___ Diversity Training (BUILD, Building our Global Community, Safe Zone, etc.)
What you get by achieving your goals is not as important as what you become by achieving your goals.

- Zig Ziglar
First Quarter Tools

The first 90 days are a critical time in establishing a new employee’s success. This is also the point where the new hire’s supervisor takes on more of the onboarding responsibility. It’s essential to train and manage new employees effectively, while making the experience personal and transformative.

To do so, we provide you a list of check-in questions to ask your new employee. This conversation could take place in regular one-on-one meetings, standing meetings, or casual chats over coffee. These conversations will help create an open working relationship, build trust, and help identify how you can better help the employee transition to their new role, team, and department.

You could also use these conversations to help the new employee create some measurable goals, establish expectations, and define what success looks like in their position.
**Best Boss Ever Check-In Questions**

*Questions to ask your new hire over coffee or 1:1s:*

1. How’s it going? How do you feel so far in your new job?
2. What are you enjoying most about your role?
3. Is the job/team/department what you expected?
4. What has surprised you?
5. Has onboarding been helpful? What would you add or change?
6. What tools and resources do you need as we go forward?
7. Do you feel like you have gotten to know your coworkers well?
8. Do you feel out of the loop about anything?
9. What should we provide to new employees that we have missed?
10. What is working? What is not working?
11. What about your role, the team, or department is still unclear?
12. How can I be a better supervisor to you?
13. As your supervisor, what can I do to make your transition easier?
Measure Your Success

New employee and University needs are always changing, so your onboarding process must constantly evolve. Feedback is one of the best ways to measure success and keep your onboarding fresh and relevant. If you can’t measure it, you can’t manage it.

The university also requests feedback from new employees. Please encourage them to share their thoughts, ideas, and experiences so we can continue to provide them what they need.
It’s very important to have a feedback loop, where you’re constantly thinking about what you’ve done and how you could be doing it better.

- Elon Musk
Parting Thoughts

Now you’re ready to make a lasting first impression with a powerful and thoughtful onboarding experience. The resources provided in this toolkit are also available, in text-only form, on the onboarding website. Feel free to customize onboarding for your team and department, and use the resources in this toolkit as a starting point.

Not everything is one-size-fits-all, so be sure to personalize and experiment to see what works best for your department and culture.

Go forth, and onboard!