



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



Onboarding: The action or process of integrating a new employee into an organization.

# 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.\*

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.

## WHAT'S IN THE TOOLKIT?

PAGE

**4**

### **PRE-BOARDING PACKAGE**

Best Boss Ever - Prep Checklist  
Welcome Email Sample

PAGE

**9**

### **FIRST DAY EXPERIENCE**

Welcome Resources  
FAQ

PAGE

**12**

### **FIRST MONTH ESSENTIALS**

Best Boss Ever Checklists

PAGE

**18**

### **FIRST QUARTER TOOLS**

Best Boss Ever Check-In Questions

PAGE

**20**

### **MEASURE YOUR SUCCESS**

PAGE

**22**

### **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.

# New Employee Email Sample

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 Resources

Welcome!

## 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/>



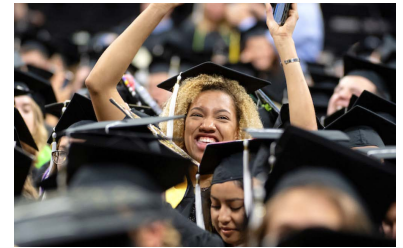
### Meet our President

<https://president.uiowa.edu/message-president-bruce-harrel>



## Learn

Get to know us a little bit better.




### Learn how we impact students & patients

<https://uiowa.edu/stories/student-outcomes>  
<https://uiowa.edu/health-care>

## EVENTS CALENDAR

FEATURED EVENTS

STUDENT INVOLVEMENT FAIR



Student Involvement Fair

Storm Large

Sep 04, 2019

Sep 06, 2019

9:00am

7:00am

SEPTEMBER

TODAY'S EVENTS

S H T W T F S



## Helpful resources

Be successful during your first few weeks.

### 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](https://hr.uiowa.edu/support/employee-relations/guidelines-hr-reps-and-supervisors/work-rules) here (<https://hr.uiowa.edu/support/employee-relations/guidelines-hr-reps-and-supervisors/work-rules>). 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](https://hr.uiowa.edu/careers/new-employee-onboarding) (<https://hr.uiowa.edu/careers/new-employee-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](https://hr.uiowa.edu/careers/onboarding/new-employee-orientation) (<https://hr.uiowa.edu/careers/onboarding/new-employee-orientation>). 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](https://hr.uiowa.edu/benefits) (<https://hr.uiowa.edu/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](https://parking.uiowa.edu/) (<https://parking.uiowa.edu/>). 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](https://hr.uiowa.edu/benefits/time-off-benefits) (<https://hr.uiowa.edu/benefits/time-off-benefits>) and holidays on the UI HR webpages or the [Operations Manual](https://opsmanual.uiowa.edu/human-resources/holidays-and-vacations) (<https://opsmanual.uiowa.edu/human-resources/holidays-and-vacations>).

## **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](https://hr.uiowa.edu/careers) (<https://hr.uiowa.edu/careers>).

## **Who should I contact if I have a leave (or medical) question?**

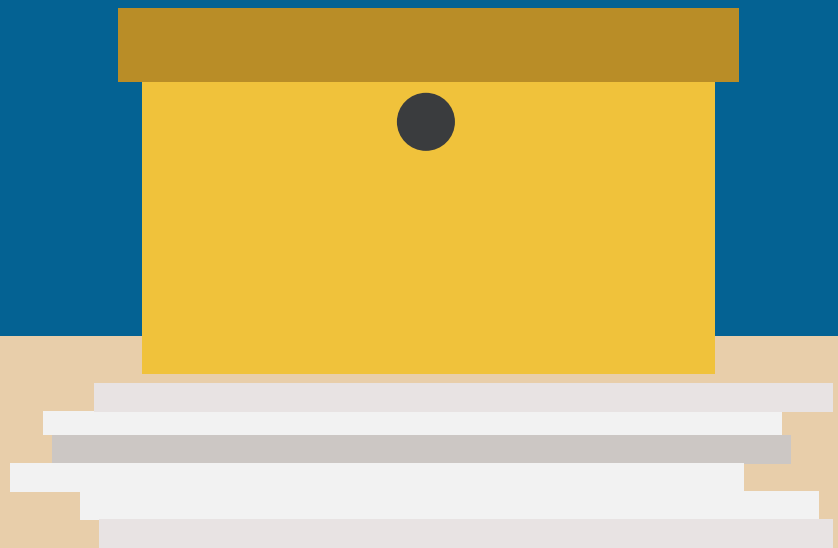
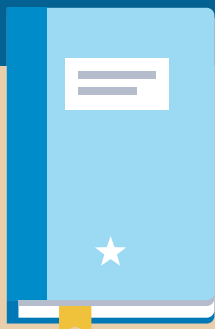
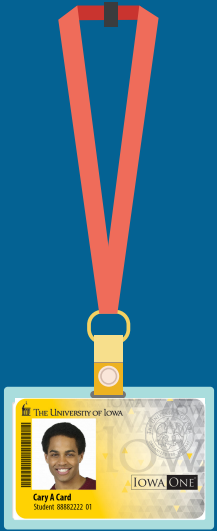
It's highly recommended to make contact with your department HR Representative and supervisor as soon as you know you may or will have a need for leave, personal or medical, in particular when it is expected to be 3 or more consecutive days or intermittent over a period of time. You may contact [Faculty and Staff Disability Services](https://hr.uiowa.edu/support/faculty-and-staff-disability-services) (<https://hr.uiowa.edu/support/faculty-and-staff-disability-services>) for more on medical leave.

**FIND ADDITIONAL RESOURCES AT [LIVING & WORKING @ IOWA](https://jobs.uiowa.edu/working-at-iowa)** (<https://jobs.uiowa.edu/working-at-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.

Schedule  
one-on-one  
meetings



# 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.

# BestBossEverChecklist

## *Their First Two Weeks (continued)*

- ☐ 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

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.

# 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.”

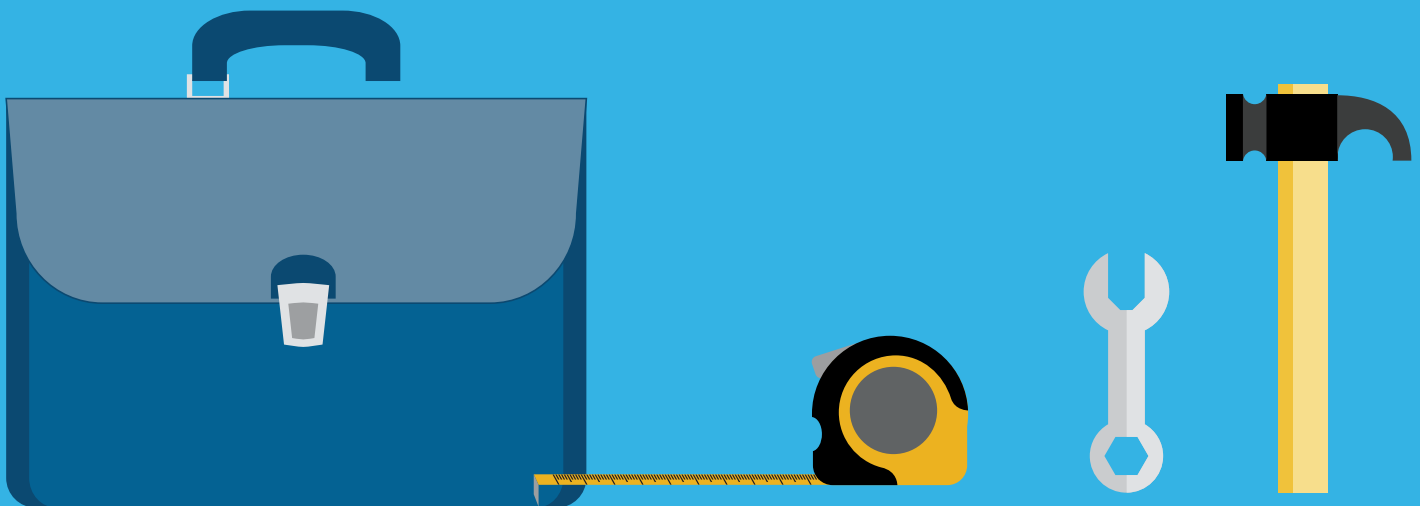
- Zig Ziglar

# 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

---



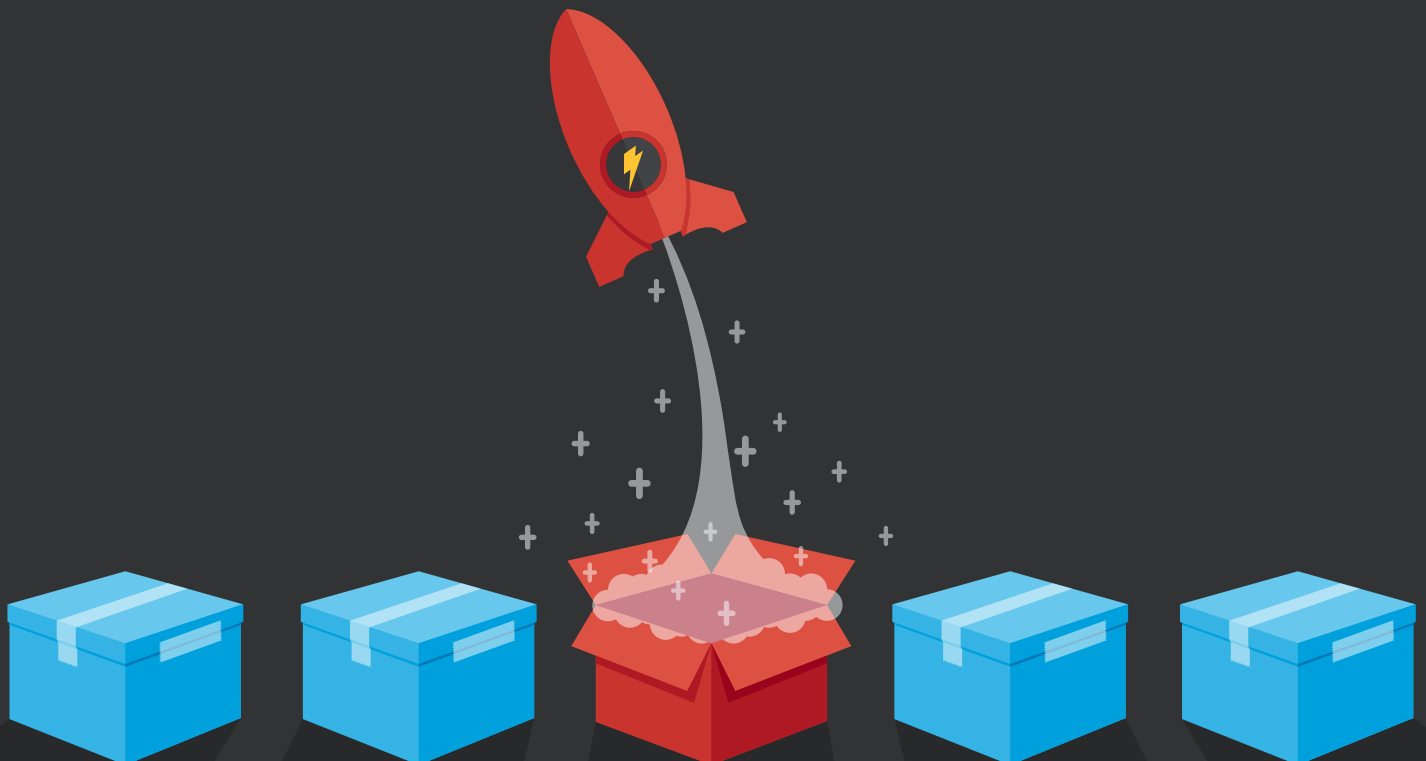
*Questions to ask your new hire over coffee or 1:1s:*

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!

