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New Employee Orientation:
Using 'Onboarding' Techniques to Increase Satisfaction and Retention

Onboarding, a relatively new approach to employee orientation, emphasizes the use of active and informal teaching modes to convey practical knowledge, create workplace connections, and increase productivity and commitment. Research demonstrates that new employees are significantly less likely to leave within three years of hiring if they have experienced a well-structured onboarding program.[1]

Unlike traditional day- or week-long orientation programs, which focus primarily on paperwork and policies, the onboarding process takes place over months and extends beyond forms and work rules. It helps newly hired employees socialize more fully into the care team by participating in an interactive and strategic learning process that encompasses organizational culture, mission and goals.

Onboarding begins with the premise that inspiring long-term loyalty and a caring, conscientious attitude requires more than cold facts and protocols – it involves relating to staff members as feeling, thinking human beings. Onboarding programs can contribute to the goal of maintaining a healthy organizational culture by

- providing a warm welcome
- affirming new hires' choice of employment

- matching new hires to appropriate mentors
- affording ample time for employees to acclimate to their new work environment
- helping employees understand enterprise-wide goals and engage in the organizational mission
- nurturing trust and esprit de corps

By reducing information overload, enriching the peer mentoring process and lengthening training periods, aging services organizations can increase employee satisfaction in the critical first months after hiring. Potential benefits include higher retention levels, lower personnel costs, more predictable staffing patterns and improved morale – which translate into safer and more satisfied residents, as well as reduced liability exposure.

This edition of *CareFully Speaking®* presents ways to retool an existing orientation program into a comprehensive onboarding process. While not every measure presented in this issue will be suitable for every organization, even smaller facilities can benefit from examining their orientation practices and implementing reasonable enhancements.

1 See "Onboarding: Early Engagement Through Recognition," a white paper published by O.C. Tanner Training Practice, October 2008. Available at **http://carrots.com/managers_tools/research/onboarding_early_engagement_through_recognition/**.

A RISK MANAGEMENT RESOURCE FOR AGING SERVICES

MAKING A POSITIVE FIRST IMPRESSION

Formal lecture-type orientation sessions postpone the more concrete, care-focused experiences that serve to boost a new employee's knowledge, confidence and performance. In lieu of tedious presentations, organizations can utilize the following more creative, compelling and employee-focused methods to relay information:

- *Reach out to new employees before their official start date.* A welcome e-mail message or letter to a newly hired staff member can make a favorable impression. Include the first day's schedule of events in the message and the name and telephone number of a contact person. In addition, provide access to the organization's intranet and direct the reader to pertinent contents, such as
  - a friendly welcome video from a member of the executive leadership team
  - online forms
  - parking and transit information
  - street and facility maps
  - frequently asked questions about employment policies, benefits and related concerns

- *Utilize multiple media to present information.* By incorporating a variety of communication methods – including print, video, online tools and face-to-face discussion – the orientation process can be rendered more efficient, thorough and user-friendly. Placing orientation material on internal Web sites enables new hires to access information at their convenience and review it at their own pace. This gives them more time to spend on hands-on activities, helping them adapt more quickly to their new role and environment. Consider posting the following content on the intranet:
  - welcome messages from the CEO, supervisor and team members
  - electronic overview of the organization
  - benefits information and enrollment forms
  - legal and compliance checklists
  - dress code
  - working hours and break policies
  - security policies and personal safety advice
  - weather-related closing protocols
  - performance review and follow-up procedures
  - mentoring program guidelines

  Within the first week after hiring, evaluate new employees' understanding of the material they have reviewed and answer any remaining questions they may have.

- *Promote familiarity early on.* In most settings, introductions and role immersion for the new recruit wait until after formal orientation. However, having supervisors and mentors meet with new staff members on their first day of the onboarding experience reinforces the sense of welcome from the outset. Supervisors are encouraged to become acquainted with new employees quickly and answer questions that arise during the first few hours and days in any new job. Even a short period spent introducing new hires to colleagues and familiarizing them with routines can lead to better initial experiences and a more positive attitude going forward.

- *Limit the amount of paperwork required on the first day.* A deluge of paperwork can prevent recently hired employees from learning about their new milieu, colleagues, residents and tasks. Checklists designed to help facilitators organize required documentation can help prioritize such generic tasks as benefit selections, tax and payroll processing, attendance reporting and e-mail account activation. Rather than overwhelming new hires with rules and regulations, consider presenting organizational policies and protocols in shorter sessions scheduled over several days.

- *Formalize basic rules regarding resident care and employee behavior.* Employee behavior agreements reinforce the message that resident abuse/neglect and workplace violence will not be tolerated. Signed documents are crucial when defending claims of improper termination or proving that the facility has met due diligence expectations in orienting employees to clinical and behavioral standards.

- *Prepare current staff for the new process.* If the onboarding concept is not carefully explained to employees, and they view newly hired staff members as being treated better than they themselves were, they are unlikely to provide a warm and supportive reception to newcomers. In addition, request feedback from existing staff regarding the program's functioning and make adjustments as necessary.

PEER MENTORING

Rarely do job descriptions and employee manuals fully convey an organization's culture and "feel." Peer mentors counsel new employees regarding the human side of the organization, as well as answering questions, modeling best practices and providing moral support. In addition, peer mentor designation recognizes and rewards high-performing staff, providing valuable and career-enhancing leadership experience. The following strategies can aid in the selection and preparation of effective, knowledgeable and sympathetic mentors:

- *Select seasoned employees as mentors.* When designating mentors, select employees with a thorough knowledge of the organization and training in relational skills, such as leadership, communication and conflict resolution. Mentors must be

Sample Schedule of Peer Mentor Objectives

Every mentoring relationship is unique, but the following listing provides a general sense of how the peer mentor's responsibilities tend to develop over time:

PRIOR TO START DATE:

- Welcome the new employee *via a personal letter or e-mail message.*
- Provide your name and telephone number *should questions arise prior to the start date.*

FIRST DAY:

- Extend a warm greeting *and encourage colleagues to do the same.*
- Describe the onboarding experience, *including goals, methods and approximate timelines.*
- Discuss the mentoring role, *emphasizing that it serves as a link between new employees and supervisors.*
- Without prying, solicit information from the new employee *about such topics as work history, outside interests and family, as appropriate.*

FIRST WEEK:

- Cover basic procedures, *confirming that the employee has*
  - *obtained an employee identification badge and building access privileges*
  - *attended initial orientation sessions*
  - *been granted computer access and provided with an e-mail account*
  - *learned how to access the intranet for information and forms*
  - *received the printed and/or online employee handbook*
  - *completed necessary paperwork, including benefits enrollment, tax forms and payroll processing*
  - *undergone safety instruction covering various emergency situations and responses*
- Meet with the new employee for daily "check-ins" *in order to answer questions and respond to concerns.*

- Review the organization's mission statement and chart, *briefly describing the various departments and functions.*
- Present organizational goals, *ensuring that the new employee understands how his/her role aligns with the enterprise-wide mission.*
- Introduce employee to the individuals with whom he/she will interact, *both in the department and throughout the organization.*
- Describe communication procedures *and provide a list of contact names for various types of inquiries.*
- Explain relevant decision-making processes, *emphasizing the need to approach problems rationally and invoke the chain of command when necessary.*

SECOND WEEK:

- Conduct short "check-ins" *with the employee every other day.*
- Ascertain the employee's level of satisfaction with the orientation to date, *inquire about areas of concern, and respond to any requests for information or assistance.*
- Monitor the progress of the employee's resident care immersion, *based upon the employee's feedback and comments from the supervisor and others.*
- Determine if the employee requires additional resources *and implement necessary measures to provide them.*

THIRD WEEK AND BEYOND:

- Meet with the employee once a week – *or more frequently if necessary – to review progress toward stated goals.*
- Elicit feedback from the employee *regarding adjustment issues.*
- Identify areas requiring additional training and orientation, *and schedule sessions as needed.*
- Ensure that the 90-day onboarding checklist is completed *by the employee's direct supervisor. (See page 6.)*
- Attend group mentoring activities – *such as lunches and receptions – with the employee.*
- Request that the employee complete an onboarding experience questionnaire *after the first 90 days of orientation.*

capable of providing guidance on official policy and governance matters, as well as judicious advice on cultural questions, such as the following:

- *What are the prevalent behavioral patterns within the organization* – e.g., a tendency toward top-down communication or a "flatter" model?
- *Are there informal channels within the facility* for obtaining prompt answers to questions?
- *What etiquette applies when speaking with physicians and other providers,* either in person or via telephone?
- *Are there unspoken workplace rules* regarding lunch and breaks?
- *How flexible is management* regarding work hours and pay intervals?
- *What are co-workers' general attitudes,* and how do they affect the work environment?

For a schedule of additional peer mentor objectives, see page 3.

- *Introduce employees to peer mentors on the first day.* Traditional orientations focus on delivering raw information, rather than quickly establishing vital connections with mentors and colleagues. In the onboarding experience, the mentor relationship begins on day one, thus offering new employees a source of information and support when negotiating unfamiliar organizational territory. Scheduling regular employee-mentor meetings can reduce uncertainty early on and ensure that new employees have someone to talk with when questions arise concerning such topics as work conditions, departmental priorities and career development.

- *Provide ample opportunities for bonding.* Failure to nurture a sound relationship between new employees and mentors is among the most common – and potentially consequential – of orientation mistakes. As newly hired employees may be reluctant to ask questions initially, supervisors should create opportunities for open and informal discussion with mentors and others throughout the first year of employment. The following activities, held both within and outside of the care setting, can help reinforce new employees' sense of acceptance and belonging:
  - *15-minute peer mentor "check-ins"* scheduled on a daily basis at first, and gradually less frequently
  - *receptions with co-workers,* mentors and facility leadership
  - *peer-mentor recognition luncheons,* held annually or semi-annually

EXTENDING THE TRAINING AND ACCLIMATIZATION PERIOD

Onboarding involves a more sustained and incremental approach to training than do traditional orientation programs. By giving new hires more time to understand, master and execute their job responsibilities, supervisors can more closely examine their proficiency levels and target areas requiring additional reinforcement. The educational and supervisory measures described below can help enhance new employees' level of competence, self-confidence and autonomy:

- *Focus on the first 90 days.* As a general rule, turnover is highest during the first three months after hiring.[2] Extending the initial orientation and training period from one week to 90 days helps ensure that new employees receive the guidance and counsel they need, which can significantly decrease attrition. The onboarding checklist on page 6 is designed to help supervisors during this critical phase in the areas of goal-setting, progress management, performance review and feedback solicitation.

- *Adopt a coaching approach to supervising new recruits.* The success of onboarding programs depends to a large extent on how supervisors relate to new employees. The traditional supervisory stance tends to frame issues in punitive terms, emphasizing the dire consequences of miscues. In contrast, a coaching approach utilizes a combination of morale-enhancing communication and management skills, including
  - demonstrating commitment to the new recruit's success
  - maintaining a helpful, nonjudgmental attitude
  - paying attention to expressed emotions, as well as objective facts
  - listening to and empathizing with employee concerns
  - soliciting and disclosing personal information, when appropriate

To learn more about the coach-supervisor method and read coaching case scenarios, see the Paraprofessional Healthcare Institute's "Creating a Culture of Retention: A Coaching Approach to Supervision," at **http://www.directcareclearinghouse.org/download/PHI-CoachingOverview.pdf**.

- *Recognize even relatively minor accomplishments of new employees.* Recognition and positive reinforcement are integral to the onboarding experience. Acknowledgement of a job well done boosts newly hired employees' confidence, enhances their comfort level, and provides motivation for continued learning and development. Examples of employee acknowledgment range from impromptu "nods" – such as e-mail messages from co-workers and supervisors or postings on break-room bulletin boards – to formal awards given

2 See California HealthCare Foundation, "Effective Strategies for New Staff Orientation." *Fast Facts: Resources for Nursing Home Professionals,* April 2006, Number 9. Available at **http://www.chcf.org/publications/2007/12/fastfacts-for-directors-of-staff-development**.

at meetings and luncheons or distributed during employee appreciation week. For additional recommendations on designing an effective employee recognition program, access the Oregon Healthcare Association's "OHCA Staff Retention Toolkit" at **http://www.ohca.com/wp-content/uploads/Staff-Retention-Toolkit.pdf**.

- *Ask orientees to evaluate their experience.* Using a brief survey, seek feedback on what aspects of the program were most helpful and how the program could better accommodate new employees' needs. (See the sample onboarding experience questionnaire below.) Solicit evaluations while the orientation process is still fresh.

The provision of safe, high-quality resident care requires a knowledgeable, empowered and well-integrated staff. By adopting an onboarding-style orientation program, with its emphasis on interactive, longer-term learning, organizations create a solid foundation for employee relations. The potential rewards of this humane and positive approach include a more loyal, dedicated and stable workforce, as well as a lower level of risk.

Sample Orientation Experience Questionnaire

The 90-day mark is an appropriate time to assess the overall job satisfaction of new employees, as well as their understanding of responsibilities and expectations, and their opinion of the orientation process. The following sample survey may be adapted, as needed:

1. The purpose of my position is … _____

2. I believe the most important part of my job is to … _____

3. My job has turned out to be close to what I expected when I applied for it. *Yes* ____ *No* ____
   Comments: _____

4. The following resources would help me provide better care for residents and achieve my goals and those of the organization:
   _____

5. I would like additional information and/or training on the following topics:_____

6. The information provided during the orientation process regarding workplace rules and expectations, tax and payroll matters, benefits and other key subjects was … *Very thorough* ____ *Satisfactory* ____ *Poor* ____
   Comments: _____

7. I rate my supervisor's contribution to the orientation process as … *Excellent* ____ *Good* ____ *Fair* ____ *Poor* ____
   Comments: _____

8. I rate my mentor's contributions to the orientation process as … *Excellent* ____ *Good* ____ *Fair* ____ *Poor* ____
   Comments: _____

9. I feel valued by colleagues and welcomed into the community. *Yes* ____ *No* ____
   Comments: _____

10. I found the following portion(s) of my orientation experience most useful: *(rank from one to five, with five being most useful)*
    ____ *organizational overview by departmental leaders*
    ____ *meetings with my supervisor*
    ____ *discussions with the human resources coordinator on benefits and conditions of employment*
    ____ *periodic check-ins with my mentor*
    ____ *intranet postings of policies, procedures and daily activities*

11. At this point in my employment, I believe I am prepared to …
    manage most situations I encounter   *Yes* ____ *No* ____   *perform my job safely*   *Yes* ____ *No* ____
    invoke the chain of command, when necessary   *Yes* ____ *No* ____   *locate necessary resources*   *Yes* ____ *No* ____
    confer with co-workers about safety issues   *Yes* ____ *No* ____   *comply with institutional policies*   *Yes* ____ *No* ____

Onboarding Checklist: The First 90 Days

The following checklist is designed for supervisors, mentors and/or human resource representatives to help track and document a newly hired staff member's progress over the critical first three months of employment:

REQUIREMENT	CHECK WHEN COMPLETED	COMMENTS
BEFORE THE START DATE:		
1. Send an organizational welcome e-mail message or letter, and attach the first week's orientation schedule.		
2. Provide a link to the organization's Web site, directing the recipient to the welcome video and "fast facts" section.		
3. Call attention to the section of the Web site with employment information, announcements and retrievable forms.		
ON DAY 1:		
1. Greet the employee upon arrival.		
2. Introduce the immediate supervisor and peer mentor (if a human resource representative hosts first-day activities).		
3. Issue an employee identification badge and grant authorization for building access.		
4. Limit first-day paperwork to essentials only (e.g., tax forms, benefits enrollment, payroll processing information, employee behavior agreement).		
5. Provide a copy of the employee handbook or access to its online equivalent.		
6. Escort the employee around the unit, making introductions, noting key locations and describing basic operations.		
7. Debrief the new employee at the end of the day on his/her initial experiences.		
8. Provide a written recap of the day's events and a token to memorialize the first day, such as a water bottle or t-shirt emblazoned with a welcome message or logo.		
BY THE END OF DAY 7:		
1. Monitor and document the employee's attendance at mandatory orientation sessions.		
2. Review basic policy and governance issues.		
3. Introduce the employee to the organization's Web site and intranet platform.		
4. Give a list of the names and telephone extensions of staff members with whom the employee will interact on a regular basis.		
5. Set short-term performance goals.		
6. Communicate general job expectations and answer any questions that have arisen.		
7. Ensure that the employee is meeting with his/her mentor on a daily basis for short periods.		
8. Confirm that the employee has a basic understanding of important organizational facts and rules.		

REQUIREMENT	CHECK WHEN COMPLETED	COMMENTS
BY THE END OF DAY 15:		
1. Assess whether initial goals have been achieved.		
2. Identify issues and concerns in need of resolution.		
3. Develop a plan to ensure acquisition of necessary skills and training within a reasonable time frame.		
4. Verify that the employee has been introduced to all co-workers and is adjusting to the new work environment.		
5. Reinforce healthy communication and problem-solving techniques.		
BY THE END OF DAY 30:		
1. Assign resident care duties commensurate with background and clinical performance to date.		
2. Monitor resident care immersion and discuss initial experiences.		
3. Review progress toward short-term performance goals.		
4. Identify and provide needed training and support.		
5. Maintain an "open-door" policy and encourage questions from the employee.		
6. Encourage the employee to continue meeting with his/her peer mentor twice a week.		
BY THE END OF DAY 45:		
1. Evaluate the employee's familiarity with the organization's mission, objectives and values.		
2. Schedule an informal coffee break or lunch get-together to discuss the employee's questions and concerns.		
3. Ask the employee for feedback regarding personal job satisfaction and any issues that have emerged.		
4. Identify at least three accomplishments for praise and three areas for improvement, and create an action plan.		
5. Begin discussing longer-term performance goals.		
BY THE END OF DAY 90:		
1. Hold a formal performance review to examine progress made toward meeting stated goals, adjusting these goals as necessary.		
2. Continue to organize lunches, discussions and other informal events that help integrate the employee into the team.		
3. Encourage the employee to maintain contact with his/her peer mentor on an ongoing basis.		
4. Request that the employee complete an onboarding experience questionnaire. (See page 5.)		

RESOURCES

- National Network of Career Nursing Assistants (also known as Career Nurse Assistants' Programs Inc.), at **www.cna-network.org**

- Nursing Assistant Resources on the Web, at **www.nursingassistants.net**

- Paraprofessional Healthcare Institute (PHI), at **www.paraprofessional.org**

- PHI National Clearinghouse on the Direct Care Workforce, at **www.directcareclearinghouse.org**

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