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A Strategic Approach to Onboarding Design: Surveys, Materials, & Diverse Hires

Question

What are best practices in the following three onboarding processes: 1. Employee surveys administered in the first 60 days. 2. Materials to align managers and employees during onboarding process. 3. Onboarding diverse employees.

Introduction

The onboarding process is critical for successful employee performance and retention, yet research shows that in Fortune 500 companies alone, half of all senior executive outside hires fail within 18 months of entry, and half of all hourly workers leave new jobs within the first 120 days⁶. Organizations that have effective onboarding processes are not only able to better prevent the failure and disappointment demonstrated by these statistics during employee transition into organizations, but most importantly, they are able to improve time-to-productivity, performance, engagement, and retention of new hires. Although research about best-in-class onboarding practices and their benefits is vast (see Appendix 1), this report will focus on 3 key aspects of the onboarding process: Best practices to build an onboarding survey, important materials to align the onboarding process, and key considerations for onboarding diverse hires.

Onboarding Surveys

Administering surveys to new hires is a great way to capture their experience during that onboarding phase and measure your program's effectiveness. In regards to best practices for onboarding surveys we found both general guidelines and specific examples. Our research shows that when developing an onboarding survey, it is pivotal to follow these three general guidelines: Choose a survey instrument that is most appropriate for your purposes, follow general survey development best practices, and organize your survey according to the onboarding phases you want to assess.

Most common survey instruments fall into two groups: Those with a *quantitative-focus*, such as self-administered surveys and questionnaires, and those with a *qualitative focus*, such as interviews, focus groups, and observations. Choice in instrument is the company's choice depending on their purpose of the onboarding survey.

Regardless of the survey instrument employed, there are certain characteristics that valid surveys should meet, such as having *measurable objectives*, *sound research design*, *effective survey question design*, *sound sampling strategy* (when needed), *effective survey response strategy*, *meaningful data summary*, and *effective data display and reporting*⁷. (See Appendix 2).

The first consideration (measurable survey objectives) is pivotal because what you want measure (i.e. employee satisfaction, success of a program, etc.) will drive your survey design. Thus, if you want to measure the effectiveness of your end-to-end onboarding process, your survey should be designed to capture metrics determined in each phase of that process: For example: pre-orientation (hiring process, employer branding, and before first day), orientation program, first day at workspace, first week on the job, first month on the job, and first 90 days on the job. Appendix 3 contains an onboarding survey example from the U.S. Office of Personnel Management. An efficient and effective way to organize an onboarding surveys is according to the defined phases of your strategic onboarding process/model (see Appendix 4).

Onboarding Process and Materials

In order to develop the appropriate onboarding materials, you should begin by devising a strategic onboarding approach, which should include the following steps: Identify key stakeholders, clarify their roles in the process, and break down onboarding process into distinct time periods and define key activities to be performed during each phase.³ Booz Allen Hamilton recommends a 5-step onboarding process, which begins when a new employee receives his or her employment offer and ends after the first year of employment.¹ (Appendix 4).

Key onboarding roles are divided into *process owners* and *process champions*. *Process owners* include HR, information technology, security, training, and facilities. *Process champions* include senior leaders, managers (and/or supervisors), sponsors/buddy, and HR business partners.³ Process owners and champions should clearly understand their (well-defined) roles in the onboarding process.

Having identified main objectives, key stakeholders and their roles, a level of resource investment, and the phases your process will be broken into, you can then decide specific actions (and thus, materials needed) to be performed in each phase of the onboarding process. As this logic shows, do not let available materials define your process. Instead, be strategic about your process, stakeholders, and objectives, and then leverage available materials to facilitate alignment between stakeholders. Appendix 5 shows

the most important materials to consider, such as an employee checklist for HR business partner, a communication plan, a tool for HR business partners and managers, a toolkit/guide for managers, and an employee reference guide for new hires ¹.

Onboarding Diverse Hires

As shown by the new hire turnover statistics, adapting to a new workplace is difficult. Being a minority in this new workplace can bring added challenges. Although the existing literature on engagement and retention of diverse hires does not specifically focus on onboarding, we found several best practices about retention of diverse hires that can be applied to the onboarding process.

Perceptions about Fair Treatment & Access: When employees work in an environment in which they perceive to have *equal access to opportunities* (access to resources, power, and developmental opportunities), *fair treatment* (employees from all demographic groups are treated in the same way, and that discrimination, conflict, and exclusion along demographic lines is minimal), and an environment where they can *be themselves at work* (free to express their unique perspective, empowered to make decisions affecting their work, and encouraged to develop innovative solutions), they will develop a strong sense of identification with the organization, which reduces the likelihood of turnover. Thus, implications for onboarding diverse hires include making the fact clear to new employees that the organization champions fair treatment and access. Employee surveys should measure the above-mentioned factors, track these results over time, and use the results to make appropriate changes to practices and culture.

Affinity/Employee Resource Groups (ERG): When ERGs are well executed, employees who are members of one or more ERGs are 61% more engaged in the workplace than their peers who are not involved in an ERG. If your organization has ERGs, make sure that someone from the pertinent group promptly contacts diverse new hires and offers a helping hand/resources/connections/development opportunities.

Mentorship & Unwritten Rules: Mentorship has proven to be of critical importance for minority development and retention ^{2, 4}. Thus, having an effective mentoring program and assigning a buddy/mentor early on in the employee's time in the organization will be especially helpful for helping him/her navigate the new culture. Diverse hires may also have a more difficult time identifying unwritten rules that lead to success in your organization. Thus, it is important that you provide them with mentorship or training on such matters, given that employees who are in different demographic groups from their leaders may not recognize unwritten organizational rules as well as other employees in the same demographic groups as their leaders ⁹.

International employees: The onboarding process can be especially critical for international hires, who are usually accustomed to different workplace cultures. Take advantage of the large amount of information available on country workplace norms (from sources such as SHRM's Global Forum⁸) to ensure that your onboarding practices allow for enough flexibility that some elements can be tailored according to cultural differences.

Inclusive leadership: Turnover is higher in diverse groups when leaders are inconsistent in the quality of relationships they develop with different employees ³. Your managers and supervisors need to be accountable to forming quality relationships with new (and diverse) hires. The HR team can foster these behaviors by measuring the quality of the relationships between leaders and employees, and by rais[ing] awareness of its effects on productivity and turnover ⁶. The former can be achieved by including questions that measure the quality of these relationships in employee surveys, and the latter through training in this area. Cornell's Center for Advanced Human Resources Studies (CAHRS) recommends that to improve in this area, organizations should expand traditional diversity training to include the advantages and disadvantages of different relationship patterns between leaders and their employees. In fact, it has been proven that managers *can* be trained to develop better quality relationships with their employees. Managers who were trained to exhibit "diversity role behaviors" such as personally getting to know each employee and removing barriers, such as language, that exclude some employees, were more likely to drive higher engagement, productivity, leader loyalty, satisfaction, intrinsic motivation, and reduce job problems and stress ⁶.

Conclusion

A strategically designed onboarding process can help better integrate new employees into the organization and achieve higher productivity, engagement, and retention ¹. The keys to a successful onboarding program include the following: Moving toward a strategic approach that goes beyond transactional activities and expands to include the overall employee experience during the critical assimilation period of their first 12-18 months in the company; engaging key stakeholders in well-defined roles in the onboarding process; measuring results and soliciting feedback about different onboarding initiatives; and, finally, leveraging your onboarding processes in a differentiated way to cater to the unique and diverse needs of key employee groups. Strategies to differentiate your onboarding program for diverse groups include managing perceptions about fair treatment and access, facilitating assimilation through mentorship and affinity groups, and training and holding your managers accountable for creating inclusive cultures.

Works Cited

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Appendix 1:

General Onboarding Best Practices

- ❑ A first-in-class onboarding program focuses on the *overall experience*, including: providing early career-planning support, helping employees adapt to the new culture and get versed in the strategy of the organization, providing networking and relationship-building opportunities, meeting administrative needs, and getting them up-to-speed in their specific roles and responsibilities ⁵.
- ❑ Employee turnover statistics show us that the greatest risk of losing a new employee is in the first 18 months. Thus, the most effective onboarding programs *ditch the common short-term focus* of typical onboarding programs, and instead provide a clear roadmap and support services during most of this period ⁵.
- ❑ Establish *metrics and benchmarks* to quantitatively demonstrate the positive impact of your onboarding initiatives on turnover and job effectiveness. Develop metrics that look at: turnover, time-to-productivity, engagement, cultural fit, and impact on recruiting brand ⁵. You can consider dividing metrics into two categories; 1. Operational metrics, such as percent of employees who have email accounts ready by day one, satisfaction rate with orientation programs, and 2. Strategic metrics, such as performance, satisfaction and attrition of new employee ³.
- ❑ Like everything else, *senior leadership support* is pivotal. It will ensure that onboarding is integrated across functions and divisions ⁵.
- ❑ Give *special consideration* and a *differentiated experience* to your most valuable, difficult to retain, and recruit talent. In an effort to provide everyone with a “common experience” do not water down your onboarding processes to the lowest common requirements, as it will hurt your ability to attract and retain your most valuable talent ⁵.
- ❑ *Train your managers* about their role in establishing effective onboarding process. It is manager’s responsibility to paint the picture of what the new culture looks like. Managers should clearly spell out what the expectation of new employees are and share with new employees what she/he can expect in return. Managers should also help them understand who they can go to for help. Managers should take the time to provide new hires with direction and support. Train your managers and hold the accountable to these behaviors through performance management ⁶.

Appendix 2: Survey Development Considerations

SMART Objectives (From *Survey Basics* by ASTD)

Broad Objective	Measures	Attributes
Determine participant reaction to the conflict management workshop.	Reaction to:	
	<u>Content Relevance</u> 1. Intent to use content 2. Importance to the job 3. Reflective of real world 4. Content use expectations 5. Usefulness of tools to application on the job (list tools)	<u>Content Relevance</u> Likert Agreement Percentages Rank Order
	<u>Facilitation</u> 1. Provides complete answers 2. Offers specific examples 3. Anticipates participant needs 4. Shifts teaching style based on audience dynamics	<u>Facilitation</u> Likert Agreement
	<u>Overall Satisfaction</u> 1. Good use of participant time 2. Good use of organization resources	<u>Overall Satisfaction</u> Likert Agreement

Survey design

When you want to measure change in behavior with a 360 degree feedback between one group involved in a program and a control group, the comparison of the two groups will fall in experimental or quasi-experimental design. When you do not know specific questions to ask on a self-administered questionnaire, you can use a focus group interview to gather preliminary information that will inform the questionnaire.

Survey question design

Asking right questions, the right way, to the right people will generate relevant and meaningful information. To achieve the desired outcome, you should keep your objective in mind when you design survey questions. The questions you ask have two characteristics: reliability and validity. Reliability indicates that each question will mean the same to respondents. Validity indicates that your question will measure what it is supposed to measure.

Do:	Do Not:
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Give clear instructions <input checked="" type="checkbox"/> Keep question structure simple <input checked="" type="checkbox"/> Ask one question at a time <input checked="" type="checkbox"/> Maintain a parallel structure for all questions <input checked="" type="checkbox"/> Define terms before asking the question <input checked="" type="checkbox"/> Be explicit about the period of time being referenced by the question <input checked="" type="checkbox"/> Provide a list of acceptable responses to closed questions <input checked="" type="checkbox"/> Ensure that response categories are both exhaustive and mutually exclusive <input checked="" type="checkbox"/> Label response categories with words rather than numbers <input checked="" type="checkbox"/> Ask for number of occurrences, rather than providing response categories such as often, seldom, never <input checked="" type="checkbox"/> Save personal and demographic questions for the end of the survey 	<ul style="list-style-type: none"> <input type="checkbox"/> Use jargon or complex phrases <input type="checkbox"/> Frame questions in the negative <input type="checkbox"/> Use abbreviations, contractions or symbols <input type="checkbox"/> Mix different words for the same concept <input type="checkbox"/> Use "loaded" words or phrases <input type="checkbox"/> Combine multiple response dimensions in the same question <input type="checkbox"/> Give the impression that you are expecting a certain response <input type="checkbox"/> Bounce around between topics or time periods <input type="checkbox"/> Insert unnecessary graphics or mix many font styles and sizes <input type="checkbox"/> Forget to provide instructions for returning the completed survey!

Sampling strategy

Who are the people you are interested in hearing from? When the target population is small and easy to contact, it is feasible to survey an entire population. However, if your survey population is large and widely dispersed this is not as feasible. To collect meaningful information and enhance the result, the sampling strategy is used to select and survey a subset of the total population.

Survey response strategy

Effective survey administration strategy will help ensure you receive an acceptable quantity and quality of survey of response. With incentives or processes, you can increase a chance of getting a good response rate.

Data summary

Data summary refers to data analysis. Many surveys lend themselves to simple descriptive statistics. Most survey data can be summarized using basic statistical procedures. Qualitative analysis can be done by categorizing words into themes.

Data display and reporting

Final results should be presented in a way that key stakeholders immediately get it. Reporting results requires written words, oral presentation, and effective graphic displays. You should think about how you can report results most effectively.

Appendix 3: Onboarding Survey Questionnaire

1= Strongly Disagree 5=Strongly Agree 12345

HIRING PROCESS

1. The job/vacancy announcement was clear and understandable. **Yes/No**
2. human resources contact was professional, knowledgeable, and helpful in the hiring process.
3. The length of time between when *I submitted my application* and when *I first heard from the agency* was reasonable.
4. The length of time between *submission of my application* and *when I received a job offer* was reasonable
5. Overall, I was satisfied with the hiring process.

BRANDING

Before I applied for this job, I was familiar with this company and its work.

AFTER YOU ACCEPTED BUT BEFORE YOUR FIRST DAY ON THE JOB

6. I was satisfied with the support and information I received before my first day on the job.
7. The information sent to me before my first day helped me know what to expect, where to go, and other key information needed on the day I reported to work
8. Someone from my work unit contacted me in advance of my first day and made me feel welcome.
9. I had a helpful, knowledgeable point of contact for my questions before I reported to work.

YOUR FIRST DAY ON THE JOB

10. In the orientation session, clear information was provided about:
 - 1) mission **Y/N**
 - 2) the role the department/function plays **Y/N**
 - 3) organizational structure **Y/N**
 - 4) how I contribute to accomplishment of the organization's mission. **Y/N**
11. The information I received on benefits and policies the on first day of the job was helpful and complete.
12. The information I received on ethics and key personnel policies (e.g., equal opportunity, sexual harassment, etc.) was clear and helpful.
13. I knew where to go to get additional assistance on personnel matters, benefits, and paperwork following my first day on the job.
14. Security was prepared for my arrival and I received appropriate credentials for building access on the first day of my job.

YOUR FIRST DAY AT YOUR DESK OR WORKSPACE

15. I was welcomed by my buddy/mentor.
16. On my first day, my workspace was organized and I had everything that I needed to start working (or knew where to get it).

17. My IT equipment (computer, email access) was ready for use.
18. Telecommunications (including phone and voicemail set-up) were ready for use.
19. My manager/supervisor was prepared for my arrival
20. I was welcomed to my office and introduced to the people on my work team.

YOUR FIRST WEEK ON THE JOB

21. I was assigned meaningful work/training during my first week on the job.
22. I knew where to go to get questions about my work answered.
23. My supervisor provided me with a clear and concise explanation of my duties and job expectations.

YOUR FIRST MONTH ON THE JOB 30.

24. My supervisor quickly integrated me into the team.
25. The performance management system was clearly explained to me.
26. I received initial training to help me understand internal systems, general operating practices, and other information needed to perform my job.

YOUR FIRST 90-DAYS ON THE JOB

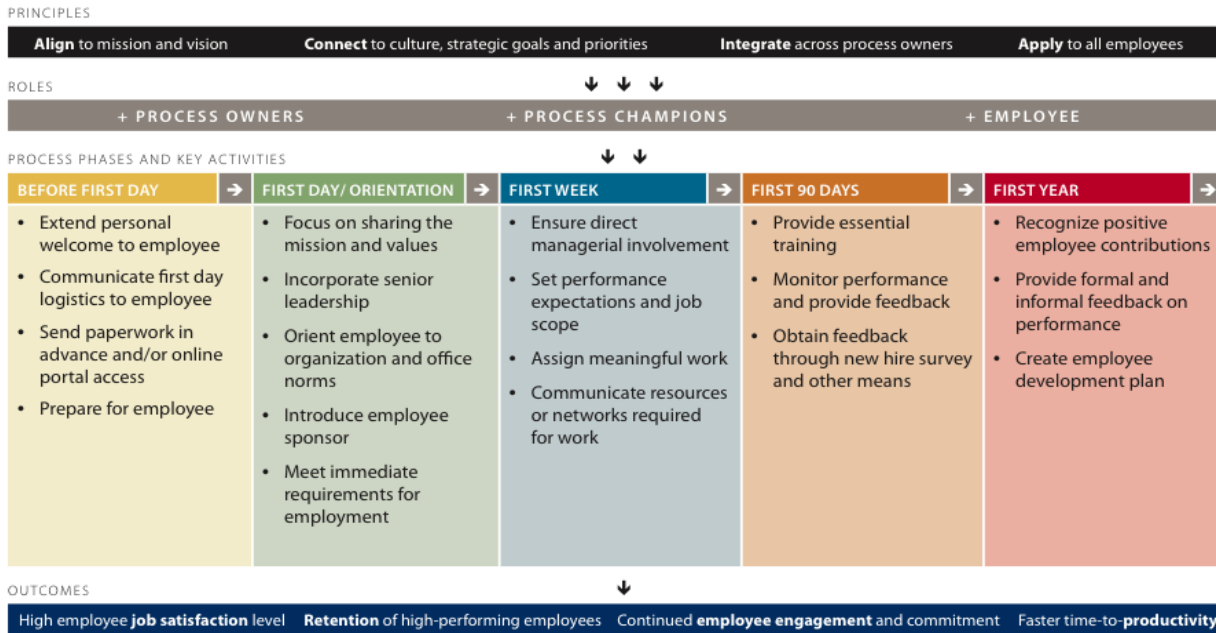
27. I received additional training to help me understand internal systems, general operating practices, and other information needed to perform my job.
28. My supervisor has provided on-going feedback about my performance.
29. My supervisor checks with me regularly to answer any questions I may have.
30. The job expectations as described in the job posting and interview process are consistent with what I am currently doing.
31. I am held accountable for my performance.
32. The organization's mission and my role in achieving mission accomplishment have been reinforced throughout the orientation process.
33. I am satisfied with the overall orientation that I have received.

OPEN ENDED QUESTIONS

34. What was your motivation for choosing or accepting this position?
35. What should be our top priority for improving our recruitment, hiring, and orientation process?
36. Please share any additional feedback or recommendations you may have to improve the agency's hiring and orientation processes.

Appendix 4: Booz Allen Hamilton's Strategic Onboarding Model

FIGURE 3
ONBOARDING MODEL



Appendix 5: Onboarding Materials

5-1 Best Practices Onboarding Checklist

NEW EMPLOYEE INFORMATION		Name:	Start Date:
		Position:	Supervisor:
		Office/Cube Number:	Phone Number:
←	Task	Status	
BEFORE FIRST DAY	Send welcome packet with important information (e.g., benefits and first day logistics) and welcome letter	<input type="checkbox"/>	
	Provide agency and job information	<input type="checkbox"/>	
	Encourage the review and completion of paperwork (if feasible) before Day 1	<input type="checkbox"/>	
	Contact new employee to answer questions and set expectations	<input type="checkbox"/>	
	Assign a sponsor/buddy	<input type="checkbox"/>	
	Assign and prepare workspace and provide office supplies	<input type="checkbox"/>	
	Ensure "office essentials" (e.g., computer, phone, e-mail, training accounts) are set up	<input type="checkbox"/>	
FIRST DAY/ ORIENTATION	If possible, personalize the experience with something unique for the new employee (e.g., welcome note, flowers, nameplate)	<input type="checkbox"/>	
	Communicate vision and mission, and administer a formal oath	<input type="checkbox"/>	
	Introduce new employee to sponsor/buddy	<input type="checkbox"/>	
	Complete paperwork and security requirements	<input type="checkbox"/>	
	Explain benefits and policies	<input type="checkbox"/>	
	Have a senior leader welcome new employees (in person or through recorded means)	<input type="checkbox"/>	
	Arrange for new employees to eat together or for someone from each employee's office to eat lunch with them on their first day	<input type="checkbox"/>	
	Provide realistic information about the organization and its culture and avoid "over promising"	<input type="checkbox"/>	
FIRST WEEK	Ensure that job roles and responsibilities are clearly communicated to the new employee	<input type="checkbox"/>	
	Introduce the new employee to other employees and senior staff	<input type="checkbox"/>	
	Provide meaningful work for the new employee — either training or substantive work related to the new job	<input type="checkbox"/>	
	Ensure that a senior leader (in the new employee's office) welcomes the new employee(s)	<input type="checkbox"/>	
	Review the organizational structure and key staff	<input type="checkbox"/>	
	Provide a list of contacts who can address the new employee's questions on a variety of issues	<input type="checkbox"/>	
	Gather feedback about the orientation program from new employees	<input type="checkbox"/>	
FIRST 90 DAYS	Review performance objectives and set individual development goals	<input type="checkbox"/>	
	Give performance feedback early and often to the new employee	<input type="checkbox"/>	
	Provide training, as needed, to help the new employee understand internal systems, general operating practices and obtain other information or skills required in the performance of his or her job	<input type="checkbox"/>	
	Discuss individual work styles and preferences	<input type="checkbox"/>	
	Arrange for the new employee to meet key stakeholders from other departments	<input type="checkbox"/>	
	Check with new employees regularly to ensure that they continue to assimilate and expand their knowledge and capabilities	<input type="checkbox"/>	
FIRST YEAR	Provide training to build competencies and fill any skill gaps	<input type="checkbox"/>	
	Conduct a new employee survey and address any issues surfaced	<input type="checkbox"/>	
	Assess the performance of the new employee periodically — formally and informally — and provide feedback: <ul style="list-style-type: none"> • Informal "manager check-ins" should occur regularly in addition to formal performance assessments, which should be completed after six months and one year. • The human capital office should send a reminder e-mail to managers at the six-month and one-year mark to ensure that formal performance reviews occur. 	<input type="checkbox"/>	
	Ensure a senior executive or manager sends a congratulatory e-mail or letter on the employee's one-year anniversary (can be done automatically without requiring the executive's time)	<input type="checkbox"/>	

5-2 Communication plan and tools

Timing	Initiator	Messages	Communication Method
After employment offer is accepted	Human Capital Office OR Human Capital Liaison in New Employee's Office	<ul style="list-style-type: none"> • Welcome • Introduce self • Explain upcoming new employee process (e.g., forms that need to be completed, suitability or clearance process) and set expectations • Provide basic information for the first day (e.g., parking, dress, where new office is, what will happen for lunch) • Information on sponsor/buddy • Answer questions and provide contact information 	Phone call with follow-up e-mail (sponsor/buddy will be copied on this e-mail)
OPTIONAL After Suitability/ Clearance is granted	Human Capital Office OR Human Capital Liaison in New Employee's Office	<ul style="list-style-type: none"> • For agencies that conduct suitability and/or clearance investigations before the first day of work, an additional contact should be made after this eligibility is granted 	E-mail or phone call
2-3 Days before First Day	New Employee Sponsor/Buddy	<ul style="list-style-type: none"> • Reiterate basic information on first day (e.g., parking, dress, where new office is, what will happen for lunch) • Describe lunch and pick-up process (if first day is orientation) • Provide contact information • Answer questions 	E-mail or phone call

TO:

FROM:

SUBJECT: Welcome to [Agency]

Dear xxxxxx:

Welcome to [Agency]! We are excited that you will be joining us for your first day on MM/DD/YYYY.

I will be your new employee buddy, someone who can help you get settled on your first day, show you around, answer any questions you have and serve as a resource over your first few weeks.

Let's begin by meeting for lunch on the day of your orientation. I will come to meet you at lunchtime.

If you have any questions between now and then, please feel free to call me at (###) ###-####.

Sincerely,

Name

5-3 Toolkit for managers / sponsors

MANAGER TOOLS

- Checklist with timeline of key activities
- Links to forms and/or sample performance plans
- Talking points for the first discussion with new employees
- Welcome e-mail template to send to the new employee's team

TO: Team
FROM: Manager

SUBJECT: Welcome Jane Doe

Dear Team:

Please welcome Jane Doe, a new Program Analyst, to our team. Jane's first project will be leading the Performance Management initiative.

Jane comes to us from the Department of Education, where she was an Assistant Program Manager for three years. Before that, she worked in the private sector for Atlantis Corp. Jane is originally from San Francisco, but enjoys living in Washington, D.C., which she considers her adopted home. In her free time, Jane is an avid cyclist and enjoys reading legal thrillers.

Jane's first day of work is June 12, and she will sit in cube 2-314. Please stop by and introduce yourself.

Sincerely,

Manager

SPONSOR TOOLS

- Sponsor training guide
- Suggested sponsor activities
- E-mail templates
- Helpful points of contact

5-4 Employee reference guide : an example of key sections and materials for an employee reference guide is included in the below:

1. About organization
 - 1.1. Organization overview: History , Mission statement , Core values, Basic organization structure and organization chart
 - 1.2. Overview of each office: leadership profiles: photos and brief biographies of key leaders
2. Navigating the organization
 - 2.1. How to find people in the organization: an overview of sources of information for finding individuals, contact information, etc.
 - 2.2. Office overviews/brochures: one page or brochure for each key support office with information on what the office does and contact information
 - 2.3. Web resources: overview of the organization's intranet and its capabilities (with screenshots and links)
 - 2.4. Booking conference rooms key
 - 2.5. communication vehicles (e.g., weekly bulletins)
3. Policies and procedures
 - 3.1. Key policies and procedures
 - 3.2. Human capital policies and procedures
 - 3.3. Benefits
 - 3.4. Performance management policies
 - 3.5. Training requirements
 - 3.6. HR information
 - 3.7. Security policies and procedures
 - 3.8. Travel policies and procedures
4. Basic information
 - 4.1. IT support services tips and tricks
 - 4.2. Audio conferencing instructions
 - 4.3. How to add a printer to your desktop
 - 4.4. Resources : intranet and HR portal
5. Your neighborhood
 - 5.1. Address of building
 - 5.2. Building map
 - 5.3. Driving, parking and public transportation directions
 - 5.4. Cafeteria information
 - 5.5. Building regulations
 - 5.6. Mail distribution plan (mailstops)
 - 5.7. Conference room locations
 - 5.8. Building resources (e.g., graphics, printing, fitness center, mother's room, meditation room/ chapel, contact for HQ customer service/building maintenance) local services and other organization locations