

SUGGESTED STEPS FOR ONBOARDING

Before the candidate comes into the office:

- ✓ Select interviewers
- ✓ Prescreen resumes and select qualified candidates
- ✓ Create interview questions for each interviewer (sample questions can be found on Wharton Human Resources' webpage)
- ✓ Conduct telephone interview (optional)
- ✓ Schedule appointments with candidates – be sure to give them clear directions to your location
- ✓ If possible, confirm interview date/time/location/names of people he/she will meet with via email
- ✓ Prepare a package of University information, including job description, business cards, Benefits-At-A-Glance, organizational chart, history of the University and School, facts sheet which can be found on Wharton Human Resources' webpage.
- ✓ Create an applicant evaluation form (samples can be found on Wharton Human Resources' webpage)

During the candidate's first visit:

- ✓ Greet the candidate
- ✓ If the candidate will have multiple interviews, give him/her a brief background on each interviewer
- ✓ Conduct the interview in a quiet, confidential location
- ✓ Ask relevant questions that speak to the behaviors and skills the incumbent needs to be successful in the position
- ✓ Leave time for the candidate to ask questions
- ✓ Explain next steps to the candidate
- ✓ Thank the candidate for coming in and walk him/her to the next destination

After the candidate's first visit:

- ✓ Shortly after interviews have concluded compare notes with interview team
- ✓ Select two or three candidates to return for a second round of interviews
- ✓ Schedule appointments with the next level of interviewers (you may want to include peers, customers, faculty, and staff outside the department). Give each interviewer the applicant evaluation form.

During the candidate's second visit:

- ✓ Meet the candidate, give him/her the day's agenda and take him/her to the first interview
- ✓ If there are multiple interviews, leave time for breaks
- ✓ If appropriate, have someone take the candidate to lunch
- ✓ Meet with the candidate at the end of the interviews to see if he/she has questions and ask him/her to sign his/her application
- ✓ Thank the candidate for coming in and explain next steps

After the candidate's second visit:

- ✓ Meet with the interview committee and select your final candidate (it may be necessary for a third round of interviews)
- ✓ Get at least two references from the preferred candidate. If candidate already supplied references, notify him/her you will be calling the references.
- ✓ Conduct at least two references for external (to the University) candidates and at least one reference for internal (to the University) candidates. One reference must be a current supervisor. If the candidate will not give you approval to contact their current supervisor, continue with references and make the offer contingent upon a favorable reference from the current supervisor.
- ✓ Forward necessary paperwork to Wharton Human Resources (compliance form, references, signed application, resume, and salary request)
- ✓ Once all approvals have been secured, contact the final candidate and make a verbal offer
- ✓ Follow up verbal offer with a written offer and necessary paperwork (offer letters are on Wharton Human Resources' webpage)
- ✓ Once the candidate has signed the written offer, notified the unsuccessful candidates that the position has been filled (sample thank you letters are on Wharton Human Resources' webpage). NOTE – notify internal candidates quickly, before they hear it from the grapevine.

Within one week before candidate's start date:

- ✓ Prepare a welcome package (business cards, department organizational chart, list of important contacts, copy of the job description, etc.)
- ✓ Organize the new hire's first week (set up meetings with necessary staff, schedule lunch and training)
- ✓ Send a message to the staff introducing the new employee
- ✓ Arrange the work area – be sure telephone/computer connections will be in place for new hire's arrival, set up desk with supplies, etc.
- ✓ Schedule school/center/department new employee orientation
- ✓ Add new hire to internal directories and payroll

New hire's first day:

- ✓ Greet new hire
- ✓ Show him/her to their work station
- ✓ Introduce new hire to co-workers
- ✓ Take the new hire on a tour of the area/school
- ✓ Conduct department orientation
- ✓ Confirm employee's new hire paperwork is complete and he/she will be in payroll in time for first paycheck
- ✓ Send him/her to Wharton Human Resources to complete I9
- ✓ Set up Penn ID
- ✓ Arrange necessary training
- ✓ Encourage employee to attend both of the school's new employee orientations

Within one – two weeks:

- ✓ Meet with employee to discuss introductory review and establish expectations
- ✓ Confirm employee is attending University new employee orientation
- ✓ Review important policies/procedures

During month one:

- ✓ Encourage employee to participate in University's and/or Wharton's mentoring program
- ✓ Meet with employee for a feedback session
- ✓ Confirm employee has received benefits package

During months two – four:

- ✓ Conduct regular feedback sessions
- ✓ Review/adjust training profile
- ✓ Conduct introductory performance review
- ✓ Create on-going goals/expectations
- ✓ Check in with employee to see if they have any questions/concerns/suggestions

On-going:

- ✓ Conduct periodic feedback sessions
- ✓ Complete annual review and merit increase process
- ✓ Establish new goals and continue to review employee's progress
- ✓ Continue to review/update training profile
- ✓ Review position responsibilities for relevance and opportunity to advance
- ✓ Discuss and develop professional development opportunities including training, conferences, mentoring, projects, cross-training, opportunity to present to management, opportunity to serve on a task-force or committee, etc.
- ✓ Celebrate employee's accomplishments (anniversaries, outstanding effort, innovation, etc.)