

Onboarding Guide for Managers

Onboarding is an invaluable and integrative process which, if carried out efficaciously, can lead to a better workplace environment, increased retention, and overall improved productivity levels. Contrary to popular belief, a successful onboarding program is not merely an orientation program. It commences before the candidate begins their first day of work and can span up to a year or more.

The purpose of the program is multifaceted. Its primary function is to get new hires engaged with the organization and its mission. Understanding the meaning and purpose of their specific roles and how it is tied to the department or organization's success is key to inspiring a sense of pride and commitment to a unified set of goals and opens the door sooner for allowing creative thinking.

On another level, onboarding contributes to a department's success by increasing retention of staff, thereby reducing the time and cost involved in the hiring process. In addition to reducing the stress involved to filling an open position for the hiring manager, it also reduces strain on existing employees that need to pick up additional responsibilities in the absence of the role being filled.

Prior to a Candidate's Start Date

As previously noted, a successful onboarding program begins before the employee is hired. During the initial interviews, the importance of making a good impression is not limited to the candidate. When an appointment is scheduled with the candidate, provide them a confirmation of the date, time, and location of the interview, as well as the names and titles of the people who will be interviewing them. A pre-assembled package with information about the University, benefits and the position is useful for the candidate.

During the interview, be sure to limit the questions to those that will reflect a candidate's behaviors and skills necessary for the position. Wharton Human Resources is also available for assistance with this and can review the interview questions, as well as provide additional sample questions.

Once the candidate has been selected and salary approved by Wharton Human Resources, a verbal offer and welcome should be made before sending the official offer letter via Workday. All other candidates should be dispositioned in Workday and those who interviewed should be notified that they were not selected. Additionally, interview notes should be included in Workday for each candidate spoken to. To maintain a positive work environment, it is important to personally notify internal

candidates first of the decision, before having them hear about it from others. Please be sure to include your Business Administrator throughout the hiring process.

Before the new hire's first day, the supervisor should reach out to the new hire to make them aware of what to expect regarding dress code, necessary documents that will be needed to complete the I-9 process, and where/when to arrive. Sending staff, a message introducing the new member of the team contributes to getting other enthusiastic about meeting the newest addition. Having the workspace space set up before the candidate arrives creates a positive and welcoming impression.

First Day

A new hire's first day of work can be intimidating and, at times, overwhelming. It is important to set an adequate amount of time on their first day to dedicate to their acclimation to the new setting. Be prepared to introduce the employee to co-workers, take him/her on a tour of the area and the School and take them to lunch (though lunch is not a requirement and should be determined based on budget and COVID-19 dining restrictions). New hires to the University may benefit from being assigned a mentor to act as an immediate resource for questions regarding procedure or university culture.

Although oftentimes the department is eager to have their new employee dive into their assigned role, the supervisor should be mindful not to overload the employee with too much information. New hires tend to get inundated with training courses and procedural information.

Please note, new hires should apply for their first PennCard [online](#) and then [make an appointment](#) to pick up their PennCard at the PennCard Center. The PennCard Center is located on the second floor of the Penn Bookstore, 3601 Walnut St.

New employees Penn IDs are associated with their Workday record and PennKey information can be generated on their first day once they have access to their computer. Wharton Human Resources will set up a new employee orientation for the new employee within the first two weeks of their start date.

Within the First Two Weeks

During an employee's initial weeks of employment, facilitate discussions to ensure that the new employee has the necessary tools and access to complete their tasks successfully and that any required training programs are scheduled. Managers should meet with them to establish expectations and goals during the [introductory review](#) and discuss important policies and procedures. [Workday](#) and the University's benefits [website](#) are a good starting point for self-help where the new employee can review medical plans, policies, and other benefits available to staff.

Since there is a lot of important information, including a review of benefits, presented during Wharton's new employee orientation, managers should reinforce the need for their new staff member to attend.

Month One- Four

The key to retaining and developing new employees is providing frequent check-ins and offering constant feedback. Meet with the employee as regularly as possible to ensure that they are meeting the department's expectations and are on course. Encouraging current staff to become a mentor to the new hire can assist an employee in transitioning into the Penn environment and culture. At the end of the introductory period, the new employee's performance should be reviewed to ascertain whether the employee can come onboard permanently, needs additional time/training (which would result in extension of the probationary period, with Wharton HR's approval), or if their employment should be terminated. The progress discussed in this review should not come as a surprise to the employee if frequent check-ins and regular feedback are provided.

Throughout Employment

To retain a successful team of employees, management is expected to continue the trend of providing periodic assessments and support to staff. Expectations and new goals should be established and clearly communicated. Managers should continue to develop their staff through training programs, conferences, projects, and committees. A successful employee is one who feels valued and becomes personally invested in furthering the departments and School's mission and goals.

For additional information or recommendations, please contact Wharton Human Resources.