



Hiring Manager Guide For Onboarding A New Manager

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Introduction

Historically, orientation programs have consisted of a half-day to a full-day of completing paperwork, listening to welcoming speeches from managers, getting the “rules” out on the table and maybe watching a video about the company and any necessary safety rules. The orientation program is a component of a larger, more complex Onboarding process. The quality of these programs directly affects the productivity and longevity of all new hires. Organizations that adopt a proactive approach to Onboarding and orientating their employees reap the benefits of a more effective and productive employee, and increase retention rates.

Management Onboarding is as an important strategic program to establish a positive path early in a new manager's career. At York University, we are committed to providing them with the support and resources during their transition.

This guide is intended to provide you with useful information to assist you in ensuring a smooth transition for the new manager.

What is Onboarding?

Onboarding, including orientation, is defined as: beginning with the first contact and ending upon the first year of employment.

Onboarding is a process whereby it gets a new manager up to speed with the policies, procedures, culture, expectations, and day-to-day responsibilities for their department/unit.

We have adopted this process at York University to:

- ensure a new manager feels welcomed
- affirm they have made the right choice in selecting an employer
- affirm that they are a fit into the organization
- build relationships with key stakeholders
- increase engagement and satisfaction
- reduce the time it takes to “hit the ground running”

What is the Difference Between Orientation and Onboarding?

The following table outlines the differences.

ORIENTATION	ONBOARDING
<ul style="list-style-type: none"> • Is typically a 1 day <u>event</u> • Focuses on organization's structure, mission and policies • Includes a review of the Employee handbook • Completion of payroll and benefits paperwork • Other administrative issues 	<ul style="list-style-type: none"> • Extends well beyond the 1st few days • Is a systematic <u>process</u> • Can last from 3 to 18 months depending on the position • Cultivates long term relationship building and access to information • Promotes better understanding of the culture, mission and goals • Fosters a feeling of belonging and affirmation of making a right choice • Reduces the time it takes to "hit the ground running"



While the components of a traditional orientation program still apply, they now become a "part" or "stage" of a much more comprehensive Onboarding process. Whereas most orientation programs conclude by the end of the first or second day in the new job, Onboarding can begin as early as the first interview and will continue well beyond the conclusion of the orientation program.

Why is Onboarding Important?

Statistics show that employees are most vulnerable to leave an organization in the 18 months after they are hired. Making a good first impression is therefore paramount.

Effective employee Onboarding serves five interrelated purposes:

1. It builds York University and your department/unit's **REPUTATION** for being a thoughtful employer, with great training, clear managership, and a strong organization.
2. It helps **RETAIN** your staff members.
3. It **REDUCES** high turnover costs.
4. It gets new staff members to efficient **PRODUCTIVITY** levels quickly.
5. It builds a **COHESIVE TEAM**, therefore raising **EVERYONE'S** productivity.

Whose Responsibility is Onboarding?

Onboarding is successful only when HR and the hiring manager are both actively involved. The goal of this partnership is to establish a long-term relationship with the employee that begins even before the employee is hired.

While HR plays a key role in the early recruitment and orientation phase and in guiding the Onboarding process, the hiring manager must be proactive and engaged in facilitating the employee's successful integration into the organization over time.



Onboarding Program at York University

A new manager will be oriented to the policies, processes, culture, expectations through a series of learning events including:

- A comprehensive Onboarding Manager checklist
- Opportunities to engage in one-on-one meetings with key contacts
- An assigned peer buddy
- A customized Onboarding Learning Calendar
- Regularly scheduled meetings with their manager

The Onboarding Program can be broken down into five phases with key activities over the course of 90 days:

Pre- Arrival	Pre- Arrival (this is the time period from acceptance of a job offer to the first day on the job)
Phase 1	First Day
Phase 2	1 st Week
Phase 3	1 st Month (30 days)
Phase 4	2 nd Month (60 days)
Phase 5	3 rd Month (90 days)

Roles & Responsibilities

New Hire

- Uses the Onboarding Manager Checklist and supporting resources to manage the process
- Engages with the hiring manager at the defined times during the process
- Attends all Onboarding Manager Learning Sessions

Hiring Manager

- Provides direction, coaching and feedback around identifying Onboarding objectives, building knowledge and relationships
- Uses the Onboarding Manager Checklist and supporting resources to facilitate a smooth transition for the new hire
- Assigns a peer buddy
- Makes time to talk on a regular basis
- Creates a customized Onboarding Learning Calendar

Human Resources

- Overall process owner
- Serves as an advisor to talk/work through complex Onboarding and transitioning challenges
- Gathers feedback and evaluates the program on an ongoing basis

Process Map for Onboarding A New Manager



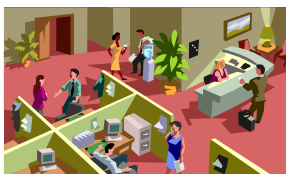
New Hire accepts position.



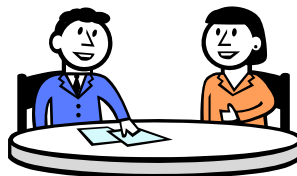
Hiring Manager completes Employee Transaction Form (ETF) and forwards document to the designated Recruiter.



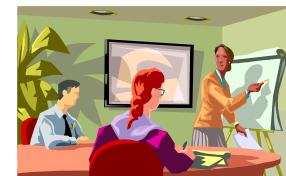
Pre- Arrival: Hiring Manager organizes workspace, creates an agenda, schedule and assigns a buddy.



First Day: New Hire is welcomed, introduced to co-worker, workspace, provided with schedule and agenda.



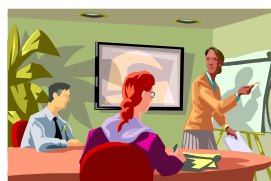
1st Week: Discussion on organization/department goals, responsibilities of the job, and key contacts.



1st Month: New Hire goals are established, workshops are attended, and 1st feedback meeting is conducted.



2nd Month: Continues to meet with staff and key contacts, attend workshops and 2nd feedback meeting is conducted.



3rd Month: Attend workshops and final 90 day meeting is conducted.



Post Probation (6 months): Annual performance review and objectives are set for the new fiscal year.

Onboarding New Manager's For Success

Starting a new job as a manager can be extremely exciting and invigorating. New managers often ask themselves “Have I made the right decision in joining this organization? Will I make a difference here? Will my contributions be valued by the organization? Will I learn and develop more? Effective management Onboarding addresses both the new employee and the organization's needs.

The hiring manager plays a significant role integrating new managers into their designated department. Onboarding a new manager isn't just about complying with the Onboarding Manager Checklist; it is more about the new hire experience. It is about making them feel:

- welcome
- comfortable
- secure (i.e. “I know if I have a question, I know where to get the answer,” and “I know enough not to feel in the dark.”)
- valued
- important
- proud
- excited
- confident

The following section provides tips on how to support, engage and retain your new manager.

Actions in Supporting the New Manager

Here are three actions the hiring manager can take to ensure that the new manager is supported and feels welcomed and valued:

1. **Plan Ahead** – prior to the new manager's first day make sure that their workstation, office supplies and equipment are in place; this will make a lasting and professional impression.

2. **Assign a buddy** - consider assigning a buddy who can fulfill the role of helping with the day to day operations and can support them through their Onboarding Program. (*Refer to Assigning a Buddy Section in this guide*)

3. **Make Time to Talk** – plan time in your calendar to meet the new manager; ideally at the beginning and end of their first day. Have their calendar planned out for them to attend meetings. Take the time to meet with them at the end of their first week to check-in with them on their impressions of the role. This also provides you with the opportunity to provide them with some feedback.

What the New Manager Needs to Learn

A new manager needs to know three general areas of knowledge:

1. Expectations
2. Appropriateness, and
3. Belonging and Connected

Expectations

Refer to the UAP and the business/unit plan and identify the priorities of the new manager upfront and on an ongoing basis. This can be a brief conversation which allows the both of you to stay in sync with one another.

Appropriateness

Appropriateness is an entirely different issue, closely tied to corporate culture. Help the new manager learn the “culture” and the values of the organization and as well as the department.

Belonging and Connected

Ensuring a new manager has connections to a variety of resources, including key contacts in the organization, helps guarantee work success. Knowing where to turn for answers and resources increases their chance of success and feelings of confidence.

But what is the plan to create those key contact relationships? How does the new person know who the important players are and how they affect their function's objectives? Here are 3 strategies for effective “meet and greet” meetings:

1. Create a strategic list of contacts.
 - Prioritize the list.
 - Determine action items and follow-up strategies for each.
2. Schedule the right meeting at the right time
 - Ensure that the meeting is timely with the business cycle.
 - Calendarize the meetings so that the new manager has context.
 - Too much too soon, can be too much too soon.
3. Consider the audience.
 - Who are the key people in each area?
 - What influence do they have over the new manager's success?
 - What demographic do they represent?

With the implementation of these 3 simple strategies, you will see your new manager and their key contacts benefiting almost immediately.



Remember: Your primary role as manager is to provide a clear consistent vision which you translate into reality by removing obstacles and providing resources!

Buddy Program

Outline of The Buddy Program

The Buddy Program matches new managers with employees who have been with York University for at least six to twelve months.

The goals:

- To help welcome the new manager and reaffirm their decision to join York University
- To provide the new manager with a point of contact for general questions regarding day-to-day aspects of working at York University
- To help the new manager integrate with York University by providing access to an employee who is familiar with the culture, norms, and expectations

Selection of Buddies

Buddies are selected by the hiring manager of the new manager. The following qualities are preferred when selecting a buddy:

- Has patience and effective communication skills
- Demonstrates strong performance
- Exemplifies York University mission and vision
- Works in the same department and/or has a similar role
- Can devote the time to be accessible to the new manager
- Shows interest in being a buddy

Expectations of Being A Buddy

Buddies are expected to:

- Be an informational resource for the new manager on day-to-day tasks
- Help in the socialization process
- Be a resource on work rules, workplace culture and norms, and unwritten politics and procedures
- Instill a sense of belonging

Role and Responsibilities of the Buddy

The role of a buddy needs to be distinguished from that of a mentor, coach or manager:

- A mentor is someone, typically more experienced, who is involved with the all-round development of an individual. A buddy is not expected to act as a mentor.
- A coach is someone responsible for developing an individual's job-specific skills. Buddies are not being asked to act as the new manager's coach. Although, a buddy's role may involve explaining some simple job-related issues, or explaining straightforward procedures, it is not a buddy's role to replace formal operational training.
- A buddy is not the manager or supervisor. A buddy will not be held responsible for the new manager's performance or asked to evaluate the new manager in any way. Any performance issues or concerns, or questions should be directed to the new manager's direct report.

The following is a sample list of topics or questions that may assist the new manager/buddy relationship:

Getting Started – Where do I find...? What resources are available to help? Who would I contact for information about...?

Day-to-day Work Tasks – How do I...? What is the process for...? Where do I get help with completing...? What do you think...? Would you be able to show me...? Could you help me with...?

Understanding the New Work Environment – Are there certain events or meetings that I should be sure to attend? What has proven successful in the past? What's the protocol on...? Who do you think would support me on...?

What a New Manager Can Expect From His/Her Buddy

- General advice
- Clear information
- Help in understanding the culture and politics
- Assistance in building networks
- Guidance and encouragement
- Confidentiality

Information for York University Buddies

Why Was I Chosen?

You have been selected as a buddy because of your experience, knowledge and skills at York University. All new managers are paired with an experienced employee for a period of three months.

What Are The Benefits Of Being A Buddy?

- Give something back to your unit/department
- Share accumulated knowledge and experience
- Gain a better understanding and awareness of yourself through helping others

What Are My Responsibilities As A Buddy?

The specific duties of the buddy will only be informally defined. How much time is spent on the program and the nature of the activities will be for the most part left up to the hiring and individual buddies. However, it is expected that the buddy will:

- Answer general/routine questions
- Act as an informational resource on policies and procedures
- Be an informational resource
- Be a contact person who provides information and guidance on day-to-day tasks
- Help the new manager build networks
- Introduce the new manager to colleagues and identify key contacts
- Help the new manager transition into their new role by providing information on workplace culture, norms and unwritten politics and procedures.

Tips for Being A Buddy

- Be approachable but set clear expectations on when and how you would like to be contacted
- Be honest. If you don't have the time – tell the new manager when you would be able to get back to her/him or see if someone else can help them
- Don't worry about being perceived as the "expert." Your experience is important to the new employee
- Be patient and positive
- Everyone learns in different ways; look for a preferred style of communication and learning and try to accommodate their style
- Listening may be more important than giving advice

Evaluation – Check-in Questions

Effective Onboarding means keeping in touch with the new manager. It means actively seeking them to find out how they're doing and – this point is critical – making it easy for them to tell you what's on their mind.

We are recommending weekly, bi-weekly and a 90 check-in with the new manager.

Part 1: Weekly and Bi-Weekly Check-in

Facilitate a ½ hour check-in weekly within the 1st month, bi-weekly within the 2nd month.

We suggest the following questions:

1. What has gone well over the last few (days or weeks)?
2. Are things going the way you expected?
3. What's been your major learning, insight, or discovery so far?
4. What would you like to have more of? What would you like to do differently?
5. What are your goals for the next week/month?
6. What has been a frustration for you?
7. How can I help? What do you need from me? How can I support you? What training, resources, etc, could I provide to help you succeed?

Part 2: 90 Day Check-in

Facilitate a 1 hour meeting at the end of the 90 days.

We suggest the following questions:

1. What were your initial impressions when you joined York?
2. What's working? What's not working?
3. What is still unclear that you need clarification around?
4. Tell me about your rewarding experience(s) or interaction(s) you had over the last three months?
5. What possibilities exist that we haven't thought about yet?
6. How has the role of the buddy assisted you with your Onboarding process?
7. What are your goals for the next few months?
8. What challenges are you struggling with?
9. How can I help? What do you need from me? How can I support you? What training, resources, etc, could I provide to help you succeed?

Part 3: Post Probation (6 months) Check-in

1. What achievements are you most proud of?
2. What's the smallest change that could make the biggest impact?
3. What are your goals for the next few months?
4. What part of the work presents the most challenge for you?
5. What new projects interest you?
6. Is there anything else I can do to help? Do you need anything to make your work easier? Do you need anything to be more successful?
7. How do you want to stay in touch moving forward?