Onboarding in a Box

The “Secret Sauce” to a Successful Experience

Vizo financial

Give them the Disney treatment.

Have you ever have had the opportunity to go to Disney? If you have not had a chance to go there in person, you surely have experienced "the magic" through the eyes of a child watching a Disney movie!

The excitement surrounding a trip to Disney begins with emails from the Disney team, telling you how they are looking forward to your arrival. Leading up to the trip, you'll discuss all the places and things you want to see and do while there, and experience increased sleepless nights as you get closer to the day you'll arrive! Once there, you won't be disappointed; every moment will be memorable and magical. And when you leave, you'll immediately begin dreaming up your next trip!

The onboarding experience your new hire candidates have is just like the Disney experience. It starts before they get there, and every step of the way is designed to make them want to return!

This onboarding guide will help you to develop a successful onboarding process, give you tools to make the experience unique and memorable and keep your new team members coming back every day!

Unpacking the Box

Tip: click a page number to open up its contents!

First Impressions

Onboarding begins with attracting quality candidates. In order to do this, every interaction or touchpoint needs to answer one question.

*** The most important question we have to answer for potential candidates is:**

Why should I join the credit union?

If you go back to the example of Disney, what do they do to attract you? What is it they focus on that compels each of us to feel we need to visit "The Magic Kingdom" at least once in our lifetime?

Now turn your thoughts to your credit union. What are some of the touchpoints that create "magical" experiences or make potential candidates want to return or join the credit union?

Think about the impression that touchpoint leaves. Is it part of the answer to "Why should I join this credit union?"

We're going to cover two areas you could focus on that have the potential to make a big impact in answering the "why" question:

1. Your website
2. Creating an Employee Value Proposition

> "You never get a second chance to make a first impression.
>
> *-Will Rogers*

Put your website to work.

Our experts in web design and social media tell us the following items are key to telling your story and answering the "why" question through your online presence.

Make sure your website is modern and accurate.
Your website is like the front of your house. People decide what's inside, and if they want to visit, based on what they see outside. Make job postings easy to find. Ensure your site is mobile-friendly.

Have a clear mission statement.
Be sure your purpose is clearly defined. This is one of the first places potential candidates will go to find the answer to the "why" question.

Include an "About Us" page.
This page helps candidates get to know you in a more informal way. This page should include employee testimonials and your Employee Value Proposition.

Include actual photos.
Pictures tell a story! Actual photos of your work environment, employees, community and employee events help candidates imagine themselves as part of the team and visually answer the "why" question.

Learn from others.

Get inspired by these credit union websites that have great components for recruiting!

Navy Federal Credit Union

PenFed FCU

Alliant CU

It's all about the value.

Another area to focus on that will answer the "why" question is creating an Employee Value Proposition (EVP). This concept can appeal to new candidates as well as existing employees, and once it has been created, it can help define or influence other touchpoints in the credit union.

Why have an EVP?

- A strong EVP drives talent attraction, engagement and retention.
- An EVP creates a competitive advantage by showing what is unique about your organization, and appeals to the type of employee you want to attract and retain.
- An EVP can be used in recruitment, onboarding, culture/engagement efforts, career development and even through the exit stage.

Tip: Jump-start your EVP with the steps & resources on the next page!

* When a new hire joins an organization, it typically takes 8 months for them to reach their full productivity.

Studies show that companies which undertake a more in-depth, extended onboarding program can help new hires gain full proficiency **34% faster** than those who participate in a short onboarding program.

Jump-start your EVP

Follow these steps to guide the development of your Employee Value Proposition:

1. Analyze what employees expect and value in the employment relationship.
2. Design an authentic and meaningful EVP with the help of employees.
3. Communicate the EVP in a way that resonates with both existing and potential employees.
4. Ensure the culture continuously reflects the promise of the EVP.

* Does your EVP answer these key questions?

- Why would the people we need want to join, do their best work here and stay?
- Why would a highly talented person choose to work here?

Further Reading:

[What Attracts the Best Employees to a Company?]

[Four Key Steps to a Great Employee Value Proposition]

[Designing Your Organization's Employee Experience]

Building excitement...

So now you have created an environment that is attracting candidates, and offers of employment are being accepted. The magic has to continue; you have worked too hard for it to stop here! If you just send out an offer letter and tell people when to show up for day one, you risk losing a candidate you worked very hard to attract.

You have to continue to build the excitement (just like when you were looking forward to going to Disney!) and keep them looking forward to joining the credit union. You want to build the anticipation of what is to come.

At Vizo Financial, we do that through a two-part process. Our payroll and benefits system offers an onboarding module where the candidate can view basic info about the company. This is also where we include a quick note that we are looking forward to them joining the team, a welcome video and an opportunity for them to begin to learn about our benefits.

We also mail out a welcome packet. People love getting mail that is not related to junk or bills. Our welcome kit includes items to build excitement, knowledge and confidence that they have made the right employment choice.

Let's build a welcome kit!

Items you can include in your welcome kit:

- ☐ Personalized welcome letter, including important day-one information such as schedule, parking, dress code, etc.
- ☐ Observed holidays
- ☐ Vision and values information
- ☐ Resources for local shopping and restaurants
- ☐ Cooperative principles
- ☐ History and information about the credit union movement

Tip:
Start with our welcome letter template on page 13!

Need more inspiration? Questions to ask when building your welcome kit:

- **What info do you want to give a newcomer about your company?** What message are you trying to communicate and what do you want new team members to think about your company?
- **How do you want to convey this information?** When thinking about branding, consider design and packaging too.
- **Will this make the newcomer feel welcome and want to stay?** Does the kit prepare them for the job, or is it more about making them feel like part of the team? It can do both.

Roll out the red carpet.

On day one, it's important to create an atmosphere of "we've been expecting you!!" When you expect a guest, you make sure everything is "just so" and you look for ways to make them feel welcomed. Many times it's the smallest details that make the biggest impact!

Here are some actions that could make a positive impact on a new hire's first day:

Culture before paperwork! HR paperwork should always wait! A great impression starts with being welcomed and learning about the company your new hire has decided to join. It builds excitement and confirmation that the right decision has been made!

A welcome card signed by each member of the team waiting on the desk, along with company swag and all the tools they will need to get started.

A tour of building, including insider secrets, like "The vending machine gets filled on Fridays at noon," "The end microwave works best" or "Here is where you go to get supplies."

Welcome email to the company. (Check out the next page for an example to get started! ➞)

Logowear! Who doesn't like to show their pride with a company hat or t-shirt?

Welcome Letter Template

Dear [new team member name],

We are excited to have you join the [CU name] team! During your first week, we'll take time to explain our organization and culture, and help you become acquainted with your new workplace and co-workers. This welcome packet includes information about our organization, as well as a list of acceptable identification documents you will need to bring with you on day one. Please review the material provided to begin getting acquainted with our company. Bring any questions you might have with you, and we will do our best to answer them on your first day.

On your starting date, [start date], we ask that you please arrive at [time]. [Manager name] will be on site to welcome you. You will have your photo taken, which will be shared with the organization as part of your welcome and will be used to create your badge ID.

Here is a quick look at the agenda for your first two days (subject to change as necessary). Please make time on your first day to discuss your ongoing schedule with your supervisor.

[Insert schedule here. Tip: there's a sample schedule on the next page!]

To help you prepare for your first week, we want to share with you a few items.

- [CU name] maintains a casual dress code. Clothing worn to work should project a professional appearance and can include [styles or examples of attire]. Attire that would attract undue attention or prevent others from fulfilling their functions or responsibilities is not permitted. Dress code standards for client site visits should always be professional and appropriate to the credit union atmosphere. Feel free to dress [style or example of attire] your first day.
- The office is equipped with a kitchen. There are [appliances] available for use. You are free to use this equipment; however, you will need to bring [supplies/utensils] your personal use. [Other supplies/utensils] are provided.
- As an early welcome to the company, enjoy a bit of shopping with the enclosed gift card! Additional swag will be waiting for you when you arrive!

Please feel free to contact us if you have any questions before your first day. We look forward to your arrival!

Sample Agenda: Day 1

9:00 AM - Arrival & Team Introductions

Tip: Send a welcome crew to greet the new teammate as they arrive!

9:30 AM - Onboarding

12:00 PM - Lunch with [Manager Name]

1:00 PM - Office Set-up and Acclimation

3:00 PM - Review Benefits and Payroll with HR

4:30 PM - End of Day

Sample Agenda: Day 2

8:30 AM - Set Up Workstation and System Access

12:00 PM - Lunch with Team Members

Tip: A team breakfast, lunch or coffee break is a great ice-breaker!

1:00 PM - [Position-specific activities]

3:00 PM - Additional Set-up and System Access

4:00 PM - Discussion with Manager

4:30 PM - End of Day

Behind the scenes.

Lets go back to Disney... behind the scenes is where the real magic happens! This is where every detail is taken care of and crafted. Here are some additional behind-the-scenes tips to ensure a successful beginning!

Appoint an onboarding coordinator.
Consistency is extremely important, so having a point person who is responsible for "creating the magic" ensures that nothing falls through the cracks.

Use checklists for both the coordinator and for the hiring managers.
It is helpful when everything that needs to be covered is in one location. Checklists for the managers also extend the influence of the onboarding coordinator in ensuring that the experience continues after day one.

Tip: Start with our sample checklists and adjust them to fit your CU!

Have a set onboarding schedule.
A well-planned schedule ensures onboarding is a new hire's first memorable experience with the company.

It is important to have a consistent experience.
The effort you put in for one should be duplicated for all. Otherwise, people wonder "What about me?" and experience the opposite effect of feeling valued.

* According to SHRM, new team members who participate in a structured orientation program are 69% more likely to remain at a company for up to 3 years.

Onboarding Coordinator Checklist

PRIOR TO FIRST DAY

- ☐ Onboarding set-up for new hire's first day including conference room reservation.
- ☐ Schedule lunch for new hire's first day. Include manager and mentor.
- ☐ Place order for lunch to be delivered. Check with new hire for dietary restrictions.
- ☐ Prepare "swag bag" and have ready when new team member arrives.
- ☐ Send welcome packet *(one week before).*

FIRST DAY

- ☐ Be available to welcome the new hire with the manager. Make them comfortable by showing the restroom location and offering them a beverage.
- ☐ Provide outline for onboarding schedule for days 1 & 2.
- ☐ Discuss company overview.
- ☐ Tour building (limited). Include introductions to team members.
- ☐ Lunch with new hire, manager and senior manager of the work area.
- ☐ Send out welcome email to the company.
- ☐ Be available to support manager and new team member during first few days.
- ☐ Put reminder in calendar to send onboarding evaluation to new hire after 90 days.

Hiring Manager Checklist

PRIOR TO FIRST DAY

- ☐ Select department mentor or trainer
  This should be the person who will act as a "buddy" to the new team member and help him/her through the first 90 days (if applicable).
- ☐ Complete any necessary system access forms
- ☐ Determine training schedule, goals & first assignment
- ☐ Schedule department lunch - for day 2
- ☐ Schedule any basic training needed for daily functioning such as phone, email, etc. - for day 2
- ☐ Schedule meeting with department's senior leader
  End of second day or within first week
- ☐ Schedule full building tour with introductions to departments
- ☐ Schedule meetings with critical staff (critical staff will vary based on department/procedures)
  Within 30-90 days
- ☐ Schedule first 90 days dialogue sessions
  - ☐ 30 days
  - ☐ 60 days
  - ☐ 90 days
- ☐ Schedule staff meetings:
  - ☐ Department
  - ☐ Company-wide
- ☐ Set up work area with basic supplies
  Pens, pencils, highlighters, ruler, business cards, notebooks, stapler, paper clips, tape, post-it notes, scissors & staples
- ☐ Decorate work space with welcome décor and card signed by team

Hiring Manager Checklist

FIRST DAY

- ☐ Meet new hire in lobby
- ☐ Lunch

SECOND DAY

- ☐ Confirm team member is set up for any necessary compliance training
- ☐ Help set up work station
  Email system, email signature, use of calendars, explore systems, how to contact Help Desk
- ☐ Phone training - voicemail
- ☐ Discuss company vision, values, performance appraisal process and review of job responsibilities
- ☐ Lunch with new hire & department
- ☐ Begin specific job training or HR paperwork
- ☐ New team member debriefing with senior leader of functional area
  - ☐ Include leader of department and mentor/trainer
  - ☐ Discuss first 2 days
  - ☐ Answer any questions
  - ☐ Review expectations
- ☐ Confirm any necessary "start of employment" paperwork has been completed
- ☐ Begin using 30-60-90 day checklist to support new hire through first 90 days

Difference Makers

Les Clefs d'Or is the cross keyed symbol of the International Association of Professional Hotel Concierges. These golden keys represent a seasoned professional, one who's developed the skills and contacts to open doors for you around the world. With a reputation of being confidantes to the traveling public, Les Clefs d'Or concierges "look after" their guests like no others can. Whether you have a simple request or a complex challenge, they continuously do their best to exceed your expectations, ensure your safety and make sure pleasure is always the primary concern.

This same kind of attitude and attention to detail is what will make all the difference on your new hire's second day. Day two is more important than day one. This is where you solidify that you are committed to their success and that you realize onboarding is not a one-day process.

Have you ever started a job where day one was onboarding, but day two was more like "Here is Joe, he will show you everything you need to know for the job. Come find me if you have any questions"?

Being dropped off like an Amazon package at someone's door doesn't feel good and can make new hires begin to question if they've made the right decision.

But there's good news! **The more intentional you are about day two, the bigger difference you can make.**

Tip: Answer the key questions on the next page right away to build confidence and provide assurance that joining your credit union was the right choice!

Day Two Key Questions

1. What will I be doing?
Yes, your new hire has seen the job description and they know the job they were hired for, but hearing from the manager (in their own words) what the job will be and what the day-to-day might look like is critical to building understanding and laying the groundwork for what is to come.

As the person overseeing onboarding, this conversation may not be your responsibility, but as the concierge or "keeper of the keys," it's your job to relay the importance of this message and support the manager in delivering it.

2. How will I learn my job?
Describing the training process gives the new hire some understanding of what the first few weeks will look like, and allows them to mentally prepare for the learning process. A written agenda for the first two weeks - including hours, locations, training format, trainer information and any meetings or company events that need to be attended - creates a partnership of responsibility, and that is key!

3. Where do I go if I have questions?
As adults, we hate to ask questions about things we feel we should already know. The more insider tips we can provide, the sooner the new person begins to feel like a valued member of the team. Of course you can provide a ton of information and questions will still arise, so ensuring the new hire has a go-to person for questions and support is critical.

4. How will I know if I am succeeding?
Clear, specific measurement is important. Set short-term goals during the first 90 days that build as the learning builds. As an onboarding coordinator, set check-ins to connect with the manager to see what goals they are setting, and with the new hire to see how they are doing. Do your best to ensure the manager is having regular one-on-ones.

It's very hard for the manager to over-communicate here. The more you encourage reinforcement of expectations and discuss how the new hire is doing, the more confidence and independence you will help build. Remember, the manager is taking this responsibility on in addition to their usual workload, so the more you can provide support, resources and suggestions, the more you can extend your influence and show the importance of onboarding!

Make time to check in.

The best way for a new hire to know if they are succeeding and to reinforce positive behavior is to have regular check-ins with the manager. Encourage your managers to schedule these right away to protect the time. If they don't, time gets away and the new hire's feelings of being valued get diminished.

Many times in the effort to be relaxed and less intimidating, managers take a simple "how are things going, what do you want to talk about?" attitude. The end result is that the new hire says "fine," and the conversation does not go anywhere.

Tip: Managers should check in daily during the new hire's first week.

The onboarding program is set up to be structured; this structure should not stop here. When learning something new or entering a new environment, structure provides reassurance and confidence.

There are four areas a productive one-on-one session should cover:

1. Performance
Awareness of goals and how those goals will be measured.

2. Vision and Values
Connect the job of the team member to the purpose of the company. When someone sees how their job impacts the bigger picture, they are more inclined to do it in an excellent fashion.

3. Expectations
What do we expect of each other, and are we meeting those expectations?

4. Motivation
What is the best and most meaningful way to motivate and recognize the new team member? Keep in mind this will be different for each employee.

Tip: Turn the page for questions to guide your 1:1 sessions!

* According to the Gallup Organization, when managers take an active role in onboarding, employees are 3.4 times more likely to strongly agree that their onboarding experience was exceptional.

New Team Member 1:1 Guide

Performance

- Are you aware of your current goals and objectives?
- How can we measure success towards meeting your goals and objectives?
- Are there any obstacles blocking your way that I can remove?
- How do your talents help you perform at a high level every day?
- Is there anyone on the team or at the company you can partner with to manage your weaknesses?

Vision and Values

- How can you and I connect what you do each day to our company vision?
- Have you seen examples of our values in action across the company? In our department?
- In your opinion, what is one thing our team can do to be models for the vision and values?

New Team Member 1:1 Guide (cont'd)

Expectations

- What do you think I expect from you?
- What do you expect from me? How can we measure these expectations?
- How can we ensure your strengths are aligned with these expectations?

Motivation

- What is the most meaningful piece of recognition you've ever received?
- When you do outstanding work, what is the best way for me to recognize you?
- How do you like to be recognized? (Face to face? In writing? In front of others? Privately? More frequently?)
- When you achieve your goals or reach certain milestones, who do you want to know about it? Who inside the company? Is there anyone outside the company I should share this news with?

Basic 1:1 Discussion Guide

General Relationship

- On a scale of 1 to 5 (with 5 being high), how are things going for you at work? Why do you say that?
- What can you or I do to make you more effective?
- What can I do to make you enjoy your job even more?

Performance

- Where are you in relation to your goals?
- What can I do to help you?
- Are there any obstacles blocking your way that I can remove?
- What other actions can you take to achieve or exceed your goals?
- Is there anyone on the team or at the credit union you can partner with to manage your weaknesses?

Basic 1:1 Discussion Guide (cont'd)

Vision

- Our Vision Statement is [insert your Credit Union's vision or mission statement here]. How can you and I connect this to what you do every day?
- How do you use your talents to live the credit union's Vision every day?
- In your opinion, what one thing can our team do to be models for the Vision?

Action Items

- Finalize who will complete which action items, and confirm deadlines.

Tip: Use this guide for any employee - from new hire to veteran!

Get set for success!

Setting a new team member up for success means providing the tools they need to become a productive member of the team as quickly as possible. It also means giving them the ability to be independent in ways that are practical and build on the skills they are learning. Focus on the following areas for early wins in terms of success and productivity:

Workstation: A new team member's workstation should be set up BEFORE they arrive (not counting virtual employees), so when they come to their desk for the first time it looks like you have been expecting them. Instructions for signing on to the system, security parameters and items they may need for comfort (two monitors, ergonomic keyboard, etc.) should all be in place.

Phone Training: Information for the expected and standard greeting should be available, as well as information on how to use the phone (transferring calls, conference calls, etc.) and how to set up voicemail.

Tip: Provide a script to make voicemail set-up easy!

Compliance: Our industry comes with a lot of required compliance training. Any required training should be ready to go so it can be used and completed in conjunction with other new team member training.

Job-Specific Software: Any additional programs or items that are instrumental to the new team member's productivity should be set up, and include instructions.

When setting someone up for success, a "buddy" can be a nice touch for a new team member. But, could that buddy also increase speed to productivity? Research says YES!

* According to HBR, new team members felt 86% more productive if they met with a buddy 4-8 times in their first 90 days.

Four to eight meetings over a 90-day period is a small commitment compared to the big impact on engagement and productivity that it will provide.

Plan down to the details.

Training plans are a critical part of the onboarding process. They provide the necessary knowledge for job-specific tasks and ensure that important topics are not missed from one new team member to the next.

On-the-job training is a frequent and useful training format, but without a specific training plan, there is no way to ensure consistency from trainee to trainee. **Take the time to create a checklist of all training topics that need to be covered with the new team member.**

Tip:
A resource guide can help new hires independently learn about the company!

One of the best ways to create a training checklist is to reach out to some of the most recent new hires and ask them what was covered or what was missed that should have been included. Involving new team members in the training process is a great way to make them feel like a valued member of the team.

New Hire Training Topics

1. The Credit Union Difference

- Empathy
- Cooperative Principles
- Banks vs. Credit Unions
- History of Credit Unions

2. Compliance Training

- Reg. CC - Funds Availability
  - Duplicates?
  - Government checks (SSI, Treasury, etc.)
- Reg. E - Electronic Funds Transfers
- Reg. DD - Truth in Savings
- Reg. D
- OFAC
- PATRIOT Act
- BSA - Bank Secrecy Act
- TILA - Truth in Lending Act
- CIP - Customer Identification Program
- Know Your Customer (KYC)
- Verifications - ID, phone calls, emails, deposits, check cashing

3. Product Knowledge

- Share Accounts
  - Checking
  - Savings
- CDs
- Online Banking
- Mobile Banking
- EFT/ACH
- Wires
- Foreign Currency/Foreign Checks
- Money Orders/Official Checks/Savings Bonds
  - Loans

4. Security

- Physical
  - Branch - inside and outside
  - Interacting with members
  - Teller Station
  - Teller Drawer
  - New Account Desk
  - Confidential Information
  - Checking ID
  - Recognizing Counterfeit Bills
  - Basic Robbery Protocol
- Cyber
  - Phishing
  - Fraud
  - Identity Theft
  - Scams
  - Viruses
  - Ransomware
  - Hacking
  - Confidential Information
  - Tips

5. Exceptional Service

- Welcoming (environment, greeting)
- Meeting Needs (problem solving, referrals)
- Leaving a Lasting Impression (relationships, dress, discretion)
- Phone Skills
- Handling Challenges (saying no, upset customers)

6. Basic Teller Skills

- Parts of a Check
- Lifecycle of a Check
- Types of Endorsements
- Counting Money
- When to Ask for ID
- CTR Completion
- Cash Drawer Limits
- Check Deposit Availability

7. Basic New Account Skills

- Types of Account Ownerships (personal and business)
- Documentation
- Customer Identification Program (CIP)
- APR vs. APY

8. Basic Loan Skills

- Types of Loans
- Principal vs. Interest
- Underwriting process (6 Cs of Credit)

Long-Term Impact

At the 90 day mark, according to statistics, you still have a good three months or so where new team members are vulnerable to leaving. As we said earlier, you have put a lot of time, money and effort into supporting this new team member, and now is not the time to stop!

The support you provide and the needs of the new team member may change, but **it is still important to partner with and support the manager to build long-term impact**.

* Nearly 1/3 of people in their job for less than 6 months are already looking for another job.

Keep them engaged!

* The most important relationship to keep new team members engaged after the first 90 days is:

Employee to Direct Manager

The most important relationship for a team member is *always* the one between them and their manager. Team members don't leave companies; they leave managers. The best way for you to continue to offer support to the manager and the new team member is to encourage continued engagement.

In order to keep people engaged, it's important to keep adding to their skills and providing appropriate feedback. After about 90 days, it is time for a more formal check-in. Monthly one-on-ones should have taken place, but now is a good time to review four areas.

Tip: A formal 90-day review can serve as a bridge to continued growth & success!

1. Performance: Where has the new team member been successful up to this point? Provide specific feedback including exhibited behaviors that will contribute to his or her ongoing success. How can the manager continue to help the new team member succeed?

2. Needs: What can the manager do to support the new team member? Are there any obstacles the manager can help remove?

3. Feedback: Which parts of the training program were most beneficial to the new team member? Do they have any suggestions for improving the program? Are there any areas the manager or the new team member feel would benefit from additional training or support?

4. Goals: What are the next milestones? What is the best way to go about meeting these milestones? What would success look like to the new team member?

At this point, the manager may feel the new team member is ready to be independent. As onboarding coordinator, sharing the importance of continued engagement and providing helpful tools and information increases the chances that the manager will stay engaged.

90-Day Onboarding Review

Performance

- As you continue to build your skills and become proficient in your position, what is one thing I can do to help you succeed?
- As you look back on the past 90 days, what are you most proud of and why?

Needs

- What can I do to support you?
- Are there any obstacles blocking your way that I can remove?

Feedback

- Which part(s) of the training process so far has been the most beneficial to you?
- Are there changes you would suggest to improve the current program?
- In which areas, if any, would you benefit from additional training or support?

Goals

- What is the next milestone you are looking to accomplish?
- What is the best way to go about learning that?
- What would success look like to you?

Maximize flow.

As the new team member and the manager embark on this next phase, it's important to have a balance of areas that still need to be worked on and areas where the new team member is ready for additional challenges.

When the challenges in life exceed our skill level, we get anxious. To get out of the anxiety zone, we simply increase our skills.

When our skill level exceeds the challenges in life, we get bored. To get out of the boredom zone, we simply increase our challenges.

When our skill level and challenges meet, we enter the creative zone where time vanishes and ideas and productivity flow effortlessly.

So how do you know whether a task is challenging or not? It has very little to do with the difficulty of the task itself; it is based largely on the employee's own perception. If the employee believes it is beyond his skill level, then it produces anxiety.

To keep new team members in a state of "flow," the manager must continue to engage the team member by playing the role of cheerleader and helping them see their skills and abilities for what they really are.

Tip: The 90-day onboarding review supports building flow!

One of the ways the manager can maximize flow is by involving the team member in the goal-setting process and continually helping them add to their skill set, as well as providing consistent, immediate feedback.

The need for consistent feedback and manager involvement only begins during the onboarding process. It's a long road that should be well traveled!

Measure the value.

By now, you should understand the importance of building a program that is engaging and supports the new team member. This type of program takes a lot of time to prepare, maintain and deliver. **The key to getting buy-in and support for this type of program is showing value, and that can be done through measurement.**

As you're building an onboarding program, it is important to think about how you will measure the success of the program. This can be challenging, as a lot of the onboarding program is built around experiences and feelings, which are hard to measure.

* 36% of HR managers cite measurement as one of their biggest onboarding challenges.

Whether your program is short and sweet or longer and more complex, there are several ways to measure its effectiveness:

1. New Hire Turnover
If you are just developing an extensive onboarding program, it may take a while to build in this type of measurement, but you can begin to gather the metrics which you will measure against. New hire turnover is the number of new team members who leave within their first year of employment. If you don't already have a full program created, you can begin to collect the numbers from HR for those who left within a year before the program was created. This will give you the number to compare against once you have finished the first year of the onboarding program.

2. Exit and Stay Interviews
Exit interviews seek to find out why employees start looking for new jobs. They may not always share the information or be completely honest, but it is still important to try and glean from this interview information that will help the company and the onboarding program get better.

A seldom used but very helpful tool is the stay interview. Managers can ask employees how the onboarding process helped employees. This can be done as part of one-on-one meetings, performance reviews or standalone meetings to discuss the onboarding process. If you have not built a full onboarding program, this might be a great topic to add to staff meetings to gather information for the basis of your program.

3. Budget to Cost
You will most likely have to set a budget for your program. At the end of the budget timeline, did you stay within budget? If you have gone over, it could be a sign of excessive hiring past the expectation. This could be due to company growth, but it could also be due to other factors. It's always a good idea to check it out.

4. Onboarding Evaluations
At the end of the first 90 days, send out an onboarding evaluation to the new hire. Ask for their opinion on the onboarding experience and any suggestions they may have. This will provide you with the ability to quickly make changes if necessary.

Tip: Turn the page for an onboarding evaluation template!

Onboarding Evaluation Template

Please take a few moments to complete this evaluation regarding your onboarding experience. All responses will be kept confidential. Your feedback will help us to continue to improve the program and ensure that all new team members quickly feel like part of the team and are confident in their decision to join our company. Return the completed evaluation to [contact name]. Thank you.

Did you feel welcomed at [company] on your first day?

☐ Yes ☐ No

Did you feel welcomed by your department in your first week?

☐ Yes ☐ No

By the end of your first 30 days, did you know what was expected of you at work?

☐ Yes ☐ No

Do you have the tools you need to do your job each day?

☐ Yes ☐ No

Were you assigned a mentor?

☐ Yes ☐ No

Have you received recognition or praise for doing good work?

☐ Yes ☐ No

Comments:

Onboarding Evaluation Template (cont'd)

Have you begun to have monthly one-on-one sessions with your manager?

☐ Yes ☐ No

Comments:

1. What parts of the onboarding program were valuable to you? Please be as specific as possible.

2. What parts of the onboarding program were not valuable to you? Please be as specific as possible.

3. Do you have any suggestions for improving the program so other new team members can quickly be successful and feel like a welcomed member of the team?

4. Is there anything else you would like us to know?

Onboarding goes virtual!

We have had to make a quick transition in many things over the past months, and onboarding is no exception. Transitioning to a virtual onboarding process may not require many changes in terms of material covered; however, the administration and relationship-building portion will become much more hands-on!

There are three areas that will require more attention in a virtual program:

1. It is much more hands on. When a new hire is in the office and going through the onboarding and training process, you can leave them for a bit to be independent. They will use this time to set up their desk, explore the building, perhaps talk to teammates or those who walk by. But when they are at home, these things don't happen, and they quickly begin to ask, "Ok, now what do I do?"

As the onboarding coordinator, it will be up to you to make sure video meetings are set for all onboarding activities, and you will have to transition the things you used to do in person into a virtual experience. For example, we used to have lunch with the new hire and the executives on day one. Now we choose to wait a week or so and schedule a coffee break with the new hire and the CEO and president.

We have found that on day one, the new team member will need that lunch time to take a break and walk away from all of the things they have had to do. They may not be used to being so independent in terms of technology setup and being on camera. This change can be tiring, and breaks are important.

It will also be important for you to partner with the hiring manager to make sure they have set clear and extended time in video meetings to get to know the new team member, provide training and help with any setup. The hiring manager may not realize the amount of time this will take, so it will be up to you to make this clear and provide help with this process.

2. Technical support is essential. People may have equipment mailed to them, or even if they pick it up at the office, they still need to set it up at home by themselves. It is important to make this process as easy as possible. Maybe certain programs can already be loaded on the computer, or maybe video tutorials can be set up in YouTube.

As the "keeper of the keys," it is important for you to ensure this process is as easy as possible and is new team member focused. A best practice is for a member of the IT team to coordinate a time with the new hire to walk them through setup, and to proactively call them later on day one or early day two to ensure all is well. Also make sure the new team member has a direct phone number and email address to contact someone in IT right away if there are issues.

3. Intentionally include others. Many of the relationships that would have been created organically by being in an office together are now not there. It will be important to introduce the new team member to as many co-workers as possible, so the more video meetings, coffee breaks, lunches and events you can include them in, the better!

Hiring Manager 30-60-90 Checklist

Tip: Tie it all together with this comprehensive checklist!

1-30 Days

- ☐ Ensure employee has everything they need to be able to begin working right away. Provide a "password buddy" to support the new hire as they log in to each system for the first time.
- ☐ Provide timely, ongoing and meaningful "everyday feedback."
- ☐ Schedule monthly one-on-one meetings with the new hire. Discuss strengths, expectations, motivation and development.
- ☐ Discuss the purpose of monthly one-on-one meetings.
- ☐ Explain how the performance/review process works and the new hire's performance goals. Determine if the new hire can handle an additional assignment. Help them gain more knowledge & confidence.
- ☐ Continue to encourage the new hire to build relationships across the credit union. Set up meetings with employees who might regularly interact with the new hire.
- ☐ Meet with the mentor (if assigned) and get their feedback.
- ☐ Confirm information regarding any mandatory compliance training has been received.
- ☐ Discuss use of company calendars and provide a review of company intranet or internal communication resources.
- ☐ Discuss and show how to access any company learning systems.
- ☐ Celebrate accomplishments with the new hire!

30-60 Days

- ☐ Meet for an informal performance check in. Continue to discuss strengths, expectations, motivation and development.
- ☐ Work with the new hire to create/modify performance and professional development goals.
- ☐ Check in with the mentor and/or the new hire (if applicable).

Hiring Manager 30-60-90 Checklist (cont'd)

- ☐ Ensure that the new hire has completed or is continuing to work on any mandatory trainings that have not been completed.
- ☐ Schedule time for the new hire to learn about credit union products and services.
- ☐ Schedule time with various departments for the new hire to get a better understanding of what each area does and how they contribute to the success of the credit union.
- ☐ Continue to celebrate the accomplishments of the new hire!

60-90 Days

- ☐ Meet for an informal performance check-in. Continue to discuss strengths, expectations, motivation and development.
- ☐ Check in with the mentor and/or the new hire.
- ☐ Review/modify the performance goals/professional development goals. If ready, give the new hire new responsibilities to increase knowledge.
- ☐ Continue to celebrate the accomplishments of the new hire!

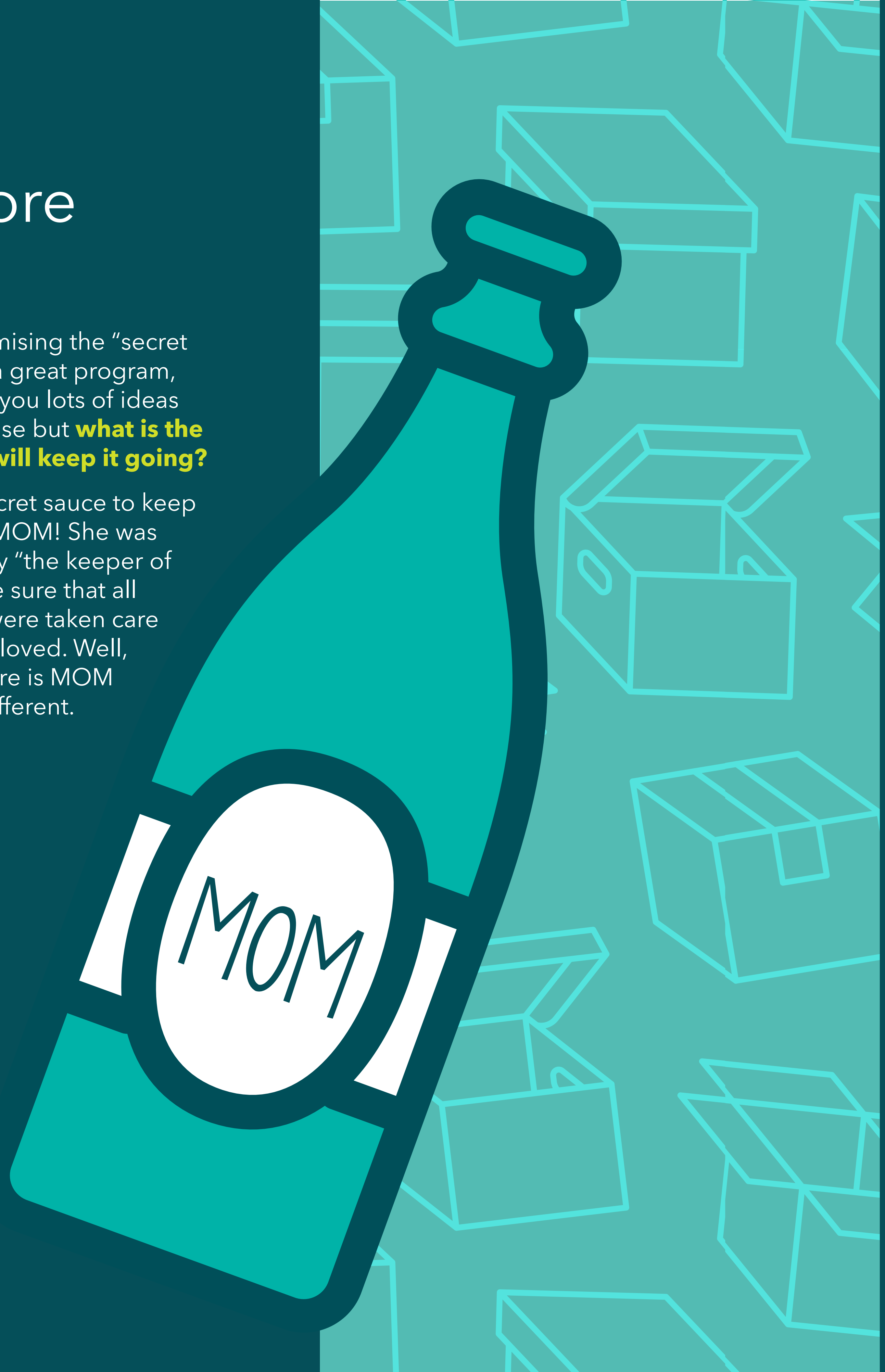
90+ Days

- ☐ Conduct an informal 90-day performance review. Discuss performance, successes, challenges and learning strategies that worked well.
- ☐ Review/modify the performance goals/professional development goals. If ready, give the new hire new responsibilities to increase knowledge.
- ☐ Meet with the new hire and mentor (if assigned) for a final discussion. Talk about what went well and what improvements from the mentor process can/should be made.
- ☐ Continue with regular performance check-ins. Continue to discuss strengths, expectations, motivation and development.
- ☐ Continue to celebrate the accomplishments of the new hire!

One more thing...

We have been promising the "secret sauce" to creating a great program, and we have given you lots of ideas and tools you can use but **what is the secret sauce that will keep it going?**

Well, what is the secret sauce to keep all of life running? MOM! She was always quite literally "the keeper of the keys" and made sure that all the special things were taken care of and that you felt loved. Well, the secret sauce here is MOM too, but it is a bit different.



Maintain the program. It will take a while to put together a program you want to have. Once you get it there, it needs to be maintained. Company statistics change, people leave or change positions, so contact numbers and organizational charts need to be updated. You'll receive evaluations from your existing program and make changes based on the feedback. It will take time and effort to keep your program up-to-date and shining!

Remember we said that consistency was important to the new hire experience? So is accurate and up-to-date information. Nothing instills doubt in a person more than being new and not getting the correct info. They begin to wonder what else is not accurate. Build time in to make sure the program is up-to-date and current before each new team member starts.

Ongoing coaching and follow-up. Remember, you are the constant between the new team member and their manager. Ensuring checklists are created and up-to-date, as well as encouraging regular one-on-ones, is a key part of the transition from a great first day or two to a great employee experience. Build a network of managers you can brainstorm with to ensure you are providing the tools that are helpful and useful.

Make it yours! Be creative and look for ways to surprise and delight that fit into your culture, or that make sense at your CU or in your geographic area. We have shared a lot of ideas here, but take the ones that make sense to you and build on them to develop a program that is unique and special!

That's a wrap!

We hope that this *Onboarding in a Box* guide has given you the resources and confidence to develop a memorable and effective onboarding program!

For more information, please view the accompanying *Onboarding in a Box* webinar recordings, located under the "People Development" section on the webinar recordings page. Feel free to contact us with any questions, or visit www.vfccu.org for more webinars and educational opportunities.

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