Clear Direction Onboarding Report

Employ	ee: Randy Thomas Start Date:
Onboar	ding Checklist
Prior to	the Randy's First Day
	Reviewed the First Day Notes page prior to Randy's first day
	Made sure that the work space and job description were ready
_	Assigned a colleague of Randy to serve as a "mentor" the first day
First Day	,
	Reviewed Job Description and Desired Outcomes
	Gave Randy a task to do and reviewed his/her progress at day end
	Had one of his/her colleagues serve as a "mentor" for the first day
End of F	irst Week
	Had discussion with Randy
	Discussed work and expectations for next three weeks
End of S	x Weeks
	Had conversation about performance and needed adjustments
_	Reviewed Randy's insights and views on going forward
Notes:	

First Day

Be sure to have Randy's first day lead to good experiences and a good memory.

(Do NOT have the first day be one of inactivity, confusion, poor planning, lack of clear direction, or non-productivity. These will result in the Randy saying things like, "They didn't even have a place for me to sit!" or "I'll meet with my boss later this week, at this point I have nothing to do." or "I think I made a mistake taking this job – they are clueless about how to run a business." or "I had lunch alone because everyone else knew each other but I don't know anyone.").

Remember that Randy will go home to loved ones and friends the first night and you want the people who care about him/her believing that your company is a good place for Randy.

Have the Following Be Part of the First Day

(you may have to adjust some of these suggestions – for example, people working a night shift won't have lunch at work)	
a deliberate welcome and "Glad you're here on our team!"	
specific opportunities for Randy to be useful/productive	
clearly defined job expectations and information about the company	
a specific place to work – even if not permanent office/desk/place	
meet the boss and touch base personally	
a "mentor" introduces to department and facilities (has lunch with the person?)	

Specific Suggestions Pertaining to Randy

Randy values personally connecting and therefore will value connecting face to face with colleagues and people s/he will be working with. Be sure that s/he is introduced one-on-one to colleagues and tell Randy something specific and special about each person.

Randy wants to add value and contribute but is not necessarily a person who will push for recognition or initiate when it's outside his/her job responsibilities. Visit with Randy how much initiative is appropriate compared to focusing on one's own defined responsibilities (is it good for a person to bring up things that are good for the company but apply to something in someone else's area of responsibility?).

When you introduce Randy to people in the company, be sure to include special training, certifications, accreditations or diplomas Randy has earned, significant positions Randy has held or organizations Randy has belonged to.

Randy has a literal side to his/her thinking. Review a calendar of expectations for the next six weeks with Randy. Be sure that meetings that are scheduled are not forgotten or dismissed as

unimportant.

Pay attention to what is interesting to Randy. Then ask him/her to solve a problem or figure out how to make something better in an area that pertains to the area of interest s/he described. Randy likes to solve problems or make things better, so work at giving him/her something to do that requires that s/he think about or analyze how to bring about a better way of doing something or arrive at a solution to a problem.

Give Randy an opportunity to bring a creative solution or perspective to something in the company or in operations.

Review company values with Randy. Have a discussion of how the company's values differ from other companies' that you have worked for or know about.

Review how job expectations are communicated and the level of initiative that is expected of each employee.

Review examples of employees who you have seen fail in your past and the perspectives they had that you think led to their problems.

First Week

- have a scheduled time for Randy for a "Manager Conversation" (and have that manager give undivided attention to that conversation)
- have Randy discuss his/her expectations
- introduction to all key colleagues and have them describe what they do

Discussion Topics for the "Manager Conversation":

Performance expectations in terms of outcomes				
The absolutes that cannot be violated (rules/boundaries)				
Discuss what you expect in terms of relationships within company				
History of the team/company and how that affects us today				
The importance of having a positive attitude and getting things accomplished				
The manager's own expectations and standards (topics to discuss)				
my standards of excellence				
my standards of fairness and how I manage				
the initiative I expect of my direct reports				
the attitudes and enthusiasm I expect everyone to bring every day				
how I expect people to treat and respond to each other				
my view on meetings, planning, and being on time				
how I expect everyone to find the solutions and not wait around				
how busy it is around here and how little time we have to interact				
how and when I want to be informed of problems				
the time I expect a new person to be up and running in your role				
who can help you when you have a question				

Suggestions for a Discussion with Randy

Ask Randy about his/her strength in building personal relationships. "It is

very important to us that people are treated with dignity. Your profile indicates that you value others individually and care about them. How does your empathy help you in work settings?"

"Randy, you are clearly not a person who is looking for the glory or awards at the expense of your colleagues or team mates. Tell me about experiences you have had where someone was out for personal recognition and it ended up being a problem for the team or organization."

Ask about Randy's own personal standards, responsibilities and expectations. ("Your profile indicated that you have very high personal standards. What would you say are those values that are most important to you? How would you describe your own standards and personal expectations?").

"Randy, we are glad you've joined us. We are dedicated to treating each person with dignity while we all do excellent work. Two months from now, you and I will have a conversation about how the job is going and how I perceive your work and your building good relationships here. Tell me what concerns you when you think about working here and doing a great job."

At the End of 60 Days

Review of job performance and making adjustments

Randy, we do this sixty day review to insure that our new employees have clear direction that they need to be successful. So we will have a simple review of how I assess your performance during your first sixty days. This gives us a chance to discuss suggestions on any adjustments you can make going forward and questions you may have.

	Super Star!	At Company Expectations	Some Issues	Danger!
Work:				
Completing Tasks & Initiative				
Timeliness & Quality				
Learning & Improvement				
Behaviors:				
Company Values				
Relationships with Peers				
Relationships with Management				
Relationships with Customers				

Give Randy an opportunity to respond to your input and to review what you expect going forward. Ask Randy for his/her impressions about the job, the company, and what improvements would help the company.

Appendix: Job Descriptions and Desired Outcomes

Too often, job expectations are not clear. We tell people to take care of customers and we may even train them to greet the customers at the door BUT WE DON'T TELL THEM THAT WE EXPECT SPECIFIC OUTCOMES (RESULTS) FROM WHAT THEY DO!

Example: Store clerks rudely interrupting by screaming "Hi! Welcome!" to customers who are talking with friends as they enter the store is not customer service. This actually annoys some customers and lowers sales. The store owner does not want the clerk to annoy people while the clerk is doing exactly what the store owner has trained him to do! The clerk was told to, "Greet the customers as they enter the store." The employee should have been told to, "Greet and interact with the customers in ways that will lead to:

the customers wanting to buy something,

the customers wanting to return to the store and

the customers bringing their friends."

Those three statements are "Desired Outcomes" and it is very important that job descriptions have "Desired Outcomes" included with the definitions of the job.

Examples:

<u>Description</u>	Corresponding Outcomes Statements
Be a Team Player	Cooperate in ways that your colleagues want to
	help you when you need help
Be Customer Oriented	Interact with customers in ways that lead to
	customers buying, returning and
	recommending our store to others
Help Me Keep Things in Order	Organize my work/projects so that I can easily
	get what I need, even when you are busy, at
	lunch, or on vacation.