

---

# New Employee Onboarding – Supervisor’s Resource

---

*A guide to your role in the  
new employee onboarding  
process*

---

Last updated: 10/11/2024

---



**Learning and  
Talent Development**

OFFICE OF HUMAN RESOURCES  
UNIVERSITY OF WISCONSIN-MADISON

For more information or consultation, contact: Marci Birkes-Geffert, Onboarding and Performance Management Coordinator, UW-Madison Office of Human Resource Development, [marci.birkes@wisc.edu](mailto:marci.birkes@wisc.edu).

Modeled after “Supervisor’s Guide to Effectively Onboarding a New Employee” - Purdue University Human Resources, <http://www.purdue.edu/hr>.



## TABLE OF CONTENTS

---

INTRODUCTION .....	2
Roles in the onboarding process.....	3
USING THIS RESOURCE .....	4
THE STAGES OF NEW EMPLOYEE ONBOARDING .....	5
STAGE 1: PRE-BOARDING – PREPARING FOR YOUR NEW EMPLOYEE’S FIRST DAY.....	6
New employee learning activities .....	7
New employee learning activities worksheet .....	8
STAGE 2: YOUR NEW EMPLOYEE’S FIRST DAY.....	9
First-day meeting with new employee.....	10
STAGE 3: YOUR NEW EMPLOYEE’S FIRST WEEK.....	11
First-week meeting with new employee.....	12
STAGE 4: YOUR NEW EMPLOYEE’S FIRST MONTH.....	13
First-month meeting with new employee.....	14
Tips on creating a development plan.....	15
STAGE 5: YOUR NEW EMPLOYEE’S FUTURE.....	16
60/90/180-day/1-year check in.....	17

# INTRODUCTION

---

## What is onboarding?

Onboarding is integrating and acculturating new employees into the university and providing them with the tools, resources, and knowledge to become successful and productive. Onboarding engages employees beginning with the acceptance of the job offer, and continues through the entire first year of employment.

## What are the goals of onboarding?

- Accommodating: Getting the new employee the tools, resources, and training to be successful
- Assimilating: Helping the employee understand and navigate the culture of the organization
- Accelerating: Minimizing the time before new employees are productive members of their workgroup

## What are the outcomes?

- Job satisfaction
- Employee retention
- Engagement and commitment
- Faster time-to-productivity

## How is onboarding different than orientation?

Onboarding is a long-term support system that integrates new employees into the organization using a comprehensive plan. Orientation is a component of onboarding that introduces a new hire to their new employment and environment. Orientation is short-term and typically takes place in the first week of employment.

Orientation	Onboarding
During week 1	Throughout year 1
Familiarize with organization's structure, mission, and policies	Actively involve in activities to align with organization culture, goals, and mission
Employee attends presentations	Employee is actively engaged/mentored
Often performed primarily by HR	Involves multiple people and departments, including managers

## Roles in the onboarding process

---

Typical roles in the onboarding process are outlined below. Roles are sometimes overlapped or combined and responsibilities are often delegated to fit the needs of a particular division/department/unit.

Role	Responsibilities
Onboarding Coordinator	<ul style="list-style-type: none"> <li>• Oversees entire onboarding process</li> <li>• Coordinates tasks within the onboarding process</li> <li>• Ensures immediate administrative needs of the new hire are met</li> <li>• Coordinates meetings and scheduling – serves as the point person for new hire</li> <li>• Tracks progress of the onboarding process</li> <li>• Ensures new hire has an opportunity to provide feedback on the onboarding experience</li> </ul>
Supervisor/Manager	<ul style="list-style-type: none"> <li>• Welcomes new hire</li> <li>• Peer partner assignment</li> <li>• Communicating job expectations</li> <li>• Meaningful work assignment</li> <li>• Training/development plan</li> <li>• Communicating department vision/mission/culture</li> <li>• Availability/Frequent check-ins</li> <li>• Timely performance feedback</li> </ul>
Peer Partner	<ul style="list-style-type: none"> <li>• Welcomes new hire</li> <li>• Provides introductions</li> <li>• Checks-in frequently</li> <li>• Assists new hire with navigating the culture of the organization</li> <li>• Serves as a resource or connects new hire with resources to answer specific questions</li> </ul>

## USING THIS RESOURCE

---

The *New Employee Onboarding – Supervisor’s Resource* will guide you through the first year of your new hire’s employment, providing instructions to complete certain actions that will help them succeed.

The onboarding process is broken into five stages. Within each stage of onboarding, you –as the supervisor— have actions you should complete.

*The more you do up front to prepare, the more successful you and your new employee will be.*

There is a pattern within each onboarding stage:

- **Review** what the new employee has accomplished to date.
- **Complete** a list of tasks.
- **Discuss** critical topics with the new employee.
- **Plan** for the next stage.

**Important Note:** Every employee and situation is different. The information covered and timeline is important, but flexibility and customization is encouraged.

### Support

Your role in this process is critical to the success of your new hire. However, you are not alone. Resources are available to you by contacting Marci Birkes-Geffert, [marci.birkes@wisc.edu](mailto:marci.birkes@wisc.edu), in the Office of Human Resources or your Human Resource representative.

## THE STAGES OF NEW EMPLOYEE ONBOARDING

---

Integrating into a new job and environment takes time. We encourage the following framework as a model.

Stage	Objective	Sample New Hire Activities
1. Pre-Boarding – Preparing for the first day	Positively impact the candidate’s first impression. Prepare them for employment and complete some administrative requirements.	<ul style="list-style-type: none"> <li>• Reviews information about the University, department, role</li> <li>• Completes initial paperwork</li> <li>• Receives welcome from coordinator</li> <li>• Receives welcome from supervisor</li> <li>• Receives onboarding plan</li> </ul>
2. First Day	Welcome the employee. A day of discovery, administrative tasks, introductions and settling in.	<ul style="list-style-type: none"> <li>• Meets with coordinator</li> <li>• Meets with supervisor</li> <li>• Meets peer partner</li> <li>• Tours workspace and department</li> <li>• Meets colleagues</li> <li>• Completes HR details</li> </ul>
3. First Week	Help the employee get acquainted with the University, school/college/division, unit, colleagues, and role.	<ul style="list-style-type: none"> <li>• Meets with supervisor</li> <li>• Registers for Benefits 101 and the campus New Employee Orientation</li> <li>• Works with peer partner to learn more about the culture of the school/college/division and unit</li> <li>• Begins to shadow or other on-the-job-training</li> </ul>
4. First Month	The employee becomes a productive member of your team and the University	<ul style="list-style-type: none"> <li>• Introduced to partner departments and associated units to learn their functions</li> <li>• Attends campus New Employee Orientation and Benefits 101</li> <li>• Meets with peer partner</li> <li>• Meets with supervisor to discuss expectations and development/training plan</li> </ul>
5. 30 day/180 days and one year	The employee continues his or her onboarding. Onboarding is an ongoing learning process.	<ul style="list-style-type: none"> <li>• Attend training</li> <li>• Continue meeting with peer partner as needed</li> <li>• Frequent check-ins with supervisor</li> <li>• Completes evaluation of the onboarding process at 180 days and one year.</li> </ul>

## ® STAGE 1: PRE-BOARDING – PREPARING FOR YOUR NEW EMPLOYEE’S FIRST DAY

---

Now that you’re expecting a new employee, planning for his or her arrival is critical. A new employee looks for immediate confirmation that joining was the right decision.

### **Review** what’s occurred:

- Review what information was shared during the recruitment process
- Confirm paperwork has been initiated by Human Resources

### **Complete:**

- Connect with onboarding coordinator to finalize the onboarding plan and schedule
- Select a peer partner for the new hire and discuss expectations for the peer partner
- Review the employee’s job description to remind yourself of the required skills of the position and the strengths of the new employee
- Create a list of learning activities
- Announce to your team who the new employee is, a little about their background, and start date
- Ensure any files and records from predecessor are accessible to new employee
- Confirm tools and system access are ready and if not, create back-up plan

### **Discuss:**

- Personally reach out to new employee and express your excitement for their arrival
- Answer any questions or refer to appropriate resource

### **Plan** for Day One:

- Schedule time on your calendar to meet with the new employee on day one
- Confirm with coordinator the week-one calendar
- Keep your calendar as clear as possible during the employee’s first week



## New employee learning activities

---

There are four broad categories of information a new employee needs:

1. Information about the University
2. College/Division/Department-specific information
3. Role-specific information
4. Job-specific information

**University** information is covered in the New Employee Orientation offered by the Office of Human Resource. This session is offered twice most months, both in-person and virtually. Visit <https://hr.wisc.edu/new-employees/new-employee-orientation/> for more information.

**College/Division/Department-specific** information is your unit's responsibility. Consult your divisional human resources for organized opportunities that may be available.

**Role-specific** information may be available through formal training opportunities or other networking avenues. Contact Marci Birkes-Geffert, [marci.birkes@wisc.edu](mailto:marci.birkes@wisc.edu), in the Office of Human Resource for more information. Examples include:

- Advisors: Contact the Office for Undergraduate Advising - [www.advising.wisc.edu](http://www.advising.wisc.edu)
- Financial Roles: Join Finance@UW - <https://hr.wisc.edu/professional-development/programs/finance-at-uw/>
- Supervisors/Managers: <https://hr.wisc.edu/managers-and-supervisors/>
- New Faculty: Contact the Office of the Secretary of the Faculty - <https://secfac.wisc.edu/>
- Academic Staff: Contact the Office of the Secretary of the Academic Staff - <http://acstaff.wisc.edu>
- Graduate School: Consult the Graduate School-Resources for Departments - <https://grad.wisc.edu/graduate-program-resources/>

**Job-specific** information is your responsibility. Providing clear direction and expectations is pivotal to your new hire's confidence and success. Your training plan can take many forms, but may include the following activities:

- Shadowing a colleague in your department
- Meeting colleagues in other departments you partner or work with frequently
- Manuals and other documented instructions and procedures
- Coaching sessions conducted by you or others
- Formal training (which may include some of the role-based trainings referenced above)

The worksheet on the following page can assist you in developing your list of learning activities for the new employee to complete over time.

## New employee learning activities worksheet

---

Create a list of activities a new employee should complete to learn about the University, their department, role and job.

When	Activity	Contact	Materials	Notes
Day One	Review job descriptions	Supervisor	Job Description	
	Department tour	Coordinator, peer partner or supervisor	Map and/or org chart	
Week One	Shadow a colleague	Supervisor		
	Meet with predecessor	Supervisor		
	Available information	Supervisor	Files, website, documentation	
Month One	University New Employee Orientation	Office of Human Resources		
	Benefits 101	Office of Human Resources		Within first 30 days
	Organized role-based training	Varies		
Future	Advanced training			

## ® STAGE 2: YOUR NEW EMPLOYEE'S FIRST DAY

---

He or she will be excited to get started, but you want to be cautious about overwhelming. Don't assume your employee will come in knowing everything. You hired the *best person* for the job, but that person still needs guidance.

**Review** what's occurred:

- Confirm all pre-boarding activities have been completed

**Complete:**

- According to the schedule that you and/or the coordinator assembled, be prepared to greet the employee upon arrival and make introductions
- Introduce new employee to peer partner

**Discuss:**

- Conduct your first-day meeting (see suggested discussion topics on following page)

**Plan** for remainder of week:

- Determine the learning activities the new employee will complete during the first week
- Consider a lunch meeting, team breakfast or other activity to welcome the new employee

## First-day meeting with new employee

---

The goal of the first-day meeting is to welcome the new employee and provide them with information to get started in their role. You may choose to discuss some of the following topics on the first day:

- 0 Review the job description. Explain specific responsibilities.
- 0 Discuss initial expectations and timeline
- 0 Share the department organization chart and names of colleagues
- 0 Discuss the mission and goals of the department
- 0 Explain your customers and those who provide support to your unit
- 0 Confirm understanding of work hours, lunch and breaks, and overtime policy/procedure (if applicable)
- 0 Discuss dress guidelines and any department-specific policies
- 0 Expectations regarding unplanned absences (sick leave) or changes to schedule
- 0 The employee's schedule of activities for week one including any learning activities
- 0 Your schedule for the week and the best time to reach you
- 0 Any additional questions

## **® STAGE 3: YOUR NEW EMPLOYEE'S FIRST WEEK**

---

During the first week, the employee still has a lot to learn and may not be entirely comfortable. Yet, many employees complain their first week is boring, so it is important you check in with them often.

**Review** what's occurred:

- 0 After day one, touch base with the coordinator to ensure that everything is on track. Make changes to the schedule if needed.

**Complete:**

- 0 Check in often with the new employee – don't wait for the employee to come to you
- 0 Check in with the peer partner to see if they have any questions for you
- 0 Have the new employee shadow a colleague
- 0 Create opportunities for the employee to interact with others and learn about University culture
- 0 Assign a meaningful work task that can be accomplished soon
- 0 Facilitate enrollment in the campus New Employee Orientation and Benefits 101
- 0 If the new hire has direct reports, work with the coordinator to ensure meetings are established
- 0 Consider a lunch outing or all-team breakfast to welcome the employee

**Discuss:**

- 0 Conduct first week meeting (see suggested discussion topics on following page)

**Plan** for Month One

- 0 Determine the learning activities for the first month

## First-week meeting with new employee

---

This meeting should be scheduled for the end of the first week. You may choose to discuss some of the following topics at the first-week meeting:

- 0 Shadowing experience
- 0 The schedule for any regular meetings (e.g. department meetings)
- 0 Confirm understanding of process to request leave time
- 0 The travel and expense reimbursement process (if applicable)
- 0 Your communication preferences (e.g. email, phone, drop-in meetings or scheduled, work phone, cell phone)
- 0 The employee's communication preferences
- 0 Employee's schedule of activities for month one, including:
  - Upcoming learning activities (New Employee Orientation, Benefits 101)
  - Enrollment procedures
- 0 Your schedule for the month and the best time and method to reach you
- 0 Any additional questions

## ® STAGE 4: YOUR NEW EMPLOYEE'S FIRST MONTH

---

The employee should be feeling more comfortable now and ready to take on more responsibility.

**Review** what's occurred:

- Confirm employee will complete Benefits 101 within 30 days and is scheduled for the University New Employee Orientation

**Complete:**

- Continue to check in at least once a week
- Provide guidance and clarification of expectations as needed
- Begin to create a development plan for the employee

**Discuss:**

- Conduct first month meeting (see suggested discussion topics on following page)

**Plan for Future**

- Schedule relevant performance reviews
- Determine learning activities
- Continue creation of development plan

## First-month meeting with new employee

---

The following are possible discussion topics for the end of the first-month meeting.

- 0 Informal feedback on the employee's performance thus far
- 0 The performance management process
  - Cycle of performance reviews/probation
  - Criteria and evaluation form
- 0 The employee's career goals
  - Collaborate on a development plan (see tips on following page)
- 0 Relationships with colleagues/conflict resolution
- 0 New ideas the employee may have
- 0 Schedule of upcoming learning activities
  - Applicable training dates
  - Online and other learning opportunities
- 0 Any additional questions



## Tips on creating a development plan

---

A development plan should be a collaborative effort between you and the employee. It can include a variety of activities such as:

- Informal on-the-job training
- Formal classroom and/or online training
- Conferences and special events
- Self-study activities

Regardless of the formality of the plan, you should work with your employee to create the plan by:

- 0 Breaking down the job by the knowledge, skills and abilities required
- 0 Determining the employee's current competency level in each area
- 0 If a gap exists, discuss potential training and learning opportunities to strengthen the area
- 0 Prioritize the needs, and create a plan

## ® STAGE 5: YOUR NEW EMPLOYEE'S FUTURE

---

Onboarding does not end after the first month. Check-ins regarding onboarding are recommended at 60/90/180 days and one year.

**Review** what's occurred:

- 0 Confirm that learning activities are happening as scheduled

**Complete:**

- 0 Conduct performance reviews as scheduled
- 0 Continue to check in regularly

**Discuss:**

- 0 Gather feedback regarding the onboarding experience at 6 months and 1 year
- 0 Conduct a formal check-in meeting with the new employee at 60 days, 90 days, 180 days, and one year (see suggested discussion topics on following page)

## 30/180-day/1-year check in

---

A check-in meeting is designed to check progress in areas other than visible performance. It's to get a feel for relationships with colleagues, frustrations or concerns with the job, successes and struggles, and whether the employee has acclimated to the culture.

Topics for conversation may include:

- 0 Does the employee understand his or her role?
- 0 Is the job what she or he expected?
- 0 What ideas does the employee have for improvements within the department or larger community?
- 0 Does the employee feel comfortable with colleagues? Feel like they are fitting in?
  - o Are there issues with colleagues that need to be addressed?
- 0 Does the employee have feedback about your relationship with him or her?
- 0 What feedback can the employee provide regarding the onboarding process?