# Instructors Guide

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.
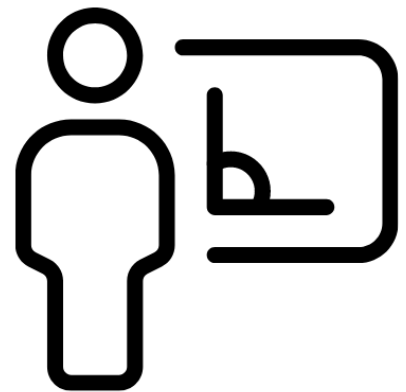
Module Two: Purpose of Onboarding

Onboarding is one of the most important investments organizations make in their employees. A sound onboarding process not only gathers the necessary paperwork from a new hire, but socializes them into the workplace and the job. Onboarding is more than just new hire orientation; it is a continuous process of integrating the new hire into the organization by helping them develop as a team member and offering necessary feedback. Far from a one-time event, the onboarding process can encompass the first 180 days of a new hire's tenure at your organization.

Start Up Costs

Organizations spend almost $40 billion every year to onboard new employees. This makes onboarding not only one the most significant time investments organizations make, but one of the most significant financial investments as well. When employees leave the organization after only a short time, these start-up costs are a lost investment. Taking time to develop a quality onboarding process helps promote employee retention, and thus promotes return on the substantial financial investment made in onboarding them.

Estimated Time	10 minutes
Topic Objective	Explore onboarding start-up costs
Topic Summary	**Start-Up Costs** Discuss onboarding start-up costs.
Materials Required	**Flipchart/board and marker**

Planning Checklist	None
Recommended Activity	Have participants list the various costs associated with onboarding an employee at their organization. List the type of cost and, if possible, the monetary amount.
Stories to Share	Share any personal or relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What costs are associated with onboarding new employees?

Employee Anxiety

A solid onboarding process also helps to alleviate employee anxiety. It is normal to feel some anxiety when starting a new job, with all its uncertainty and new information. An onboarding process that not only fulfills requirements regarding paperwork and policy but which also introduces the new hire to the workplace, coworkers, and workplace expectations, goes a long way toward relieving anxiety and helping the employee feel comfortable. This, in turn, helps promote employee retention.

Estimated Time	10 minutes
Topic Objective	Employee anxiety.
Topic Summary	**Employee Anxiety** Explore reasons for and solutions to new employee anxiety.
Materials Required	**Worksheet 1: Employee Anxiety**
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the group.
Stories to Share	Share any personal relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What will help new employees be less anxious?

Employee Turnover

Preventing employee turnover is one important purpose of the onboarding process. Many employees decide whether to stay in or leave a job within the first six weeks of employment, and for almost all workplaces the first 90 days of employment is a critical period for employee retention. Employees who are anxious, uncertain about expectations, or otherwise do not feel part of the organization are more likely to leave within the first 90 to 180 days.

Estimated Time	10 minutes
Topic Objective	Employee Turnover
Topic Summary	**Employee Turnover** Consider the reasons an employee might leave a job in the first 90 days and brainstorm solutions.
Materials Required	**Flipchart/board and marker**
Planning Checklist	None
Recommended Activity	Discuss the reasons an employee might leave a job in the first 90 days and brainstorm solutions, and list these on the flipchart/board.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	How can we use onboarding to encourage employee retention?

Realistic Expectations

The onboarding process is an opportunity to provide the new hire with realistic expectations. It is key that the organization and the new hire's manager have realistic expectations of what the onboarding process can do. Even the most efficient and quality onboarding process will not prevent all employee turnover. In addition, not all new hires will respond the same way to onboarding activities. No onboarding process can alleviate all anxiety, or fully socialize the new hire in just a few weeks. Setting realistic expectations for the new employee and the organization in terms of onboarding outcomes is important.

Estimated Time	10 minutes
Topic Objective	Realistic Expectations
Topic Summary	**Realistic Expectations** Discuss realistic expectations of the onboarding process.
Materials Required	**Flipchart/board and marker**
Planning Checklist	None
Recommended Activity	As a group, discuss the expectations employees and employers have of the onboarding process, and make a list on the flipchart/board. Then discuss whether these are realistic or not. For those that are not, work to make them realistic.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Why is it key to have realistic expectations of the onboarding process?

Practical Illustration

Marisol was hired into an entry-level job at a major firm in her industry. She was very excited to begin the job. On her first day, her manager handed her a large stack of paperwork and a pen, placed her in an empty conference room, and asked her to fill out the paperwork. Two hours later, her manager showed her to her cubicle and gave her the training manual for her new position. The manager told Marisol to call or email if she had any questions at all during her first day, and then left her to work independently.

Marisol spent the first part of the day reading the training manual, but still found herself anxious about her ability to do the job, and also realized she was unsure what she was expected to do and complete. Her manager did not return voicemail until late in the day, so Marisol found herself uncertain how to proceed. As she ate lunch alone in her cubicle, she wondered if she would ever get the hang of this new job.

Module Two: Review Questions

1.) Which of the following is true of onboarding?

    a)   It is complete in a new hire's first day
    b)   It is a relatively small organizational investment
    c)   It has no impact on employee retention
    d)   It is one of the most significant financial investments organizations make

Onboarding is one of the most significant financial investments organizations make in their employees. When employees leave the organization, the organization loses that investment.

2.) About how much do organizations spend each year in onboarding new hires?

    a) $40 million
    b) $40 billion
    c) $100 billion
    d) $25 billion

According to the Society for Human Resource Managers, organizations spend about $40 billion per year on onboarding costs. This represents one of the most significant expenditures they make on employees.

3.) Which of the following is true of employee turnover?

    a)   The first 90 days are a critical time in determining turnover
    b)   Many employees decide to leave a job within the first 6 weeks
    c)   Sound onboarding can help limit employee turnover
    d)   All of the above

Many employees decide to leave a job within the first 6 weeks, and the first 90 days is a critical time in employee retention. A sound onboarding process can help promote employee retention.

4.) Which of the following is not a realistic expectation of onboarding?

    a)   It will help promote employee retention
    b)   It will help new hires become comfortable in the job
    c)   It will eliminate new hire turnover
    d)   It will help alleviate new hire anxiety

No onboarding process can eliminate all employee turnover, but a sound onboarding process can limit such turnover among new hires. It can also alleviate employee anxiety by helping new hires feel comfortable in the job, which can help promote retention.

5.) A sound onboarding process can last up to how long?

    a) 8 hours
    b) 180 days
    c) 5 days
    d) 45 days

The onboarding process is continuous, and can often last up to 180 days into a new hire's tenure with the organization. It should never be thought of as a one-time event.

6.) Which is true of onboarding?

    a) It helps employees understand expectations for the job
    b) It involves a manager giving and receiving feedback
    c) It helps integrate the new hire into the organization
    d) All of the above

Onboarding is more than just orientation. It is a continuous process of giving and receiving feedback, integrating the new hire into the organization, and helping the employee understand expectations for the job.

7.) Which of the following is true of employee anxiety?

    a) It is a normal part of starting a new job
    b) It shows that the employee is unqualified
    c) It naturally goes away with time
    d) All of the above

Anxiety is a normal part of starting a new job, even if the employee has done similar work before. A solid onboarding process helps to alleviate employee anxiety.

8.) Employee anxiety contributes to which of the following?

    a) Productivity
    b) Collegiality
    c) Motivation
    d) Turnover

Employee anxiety can contribute to turnover if it is not addressed. This is why one of the key goals of onboarding is to help alleviate new hire anxiety.

9.) What best describes Marisol at the end of her first work day?

   a) Anxious
   b) Comfortable
   c) Relaxed
   d) Excited

Marisol was experiencing significant anxiety at the end of her first day on her new job. She was uncertain about whether she would ever understand her new job.

10.) Which of the following is true of the onboarding process Marisol experienced?

   a) She was not given realistic expectations
   b) She was not given feedback
   c) She was not made to feel welcome
   d) All of the above

The onboarding process Marisol experienced did not lay out realistic expectations. It also did not make her feel welcome, as she was not introduced to coworkers and was left alone much of the day. Her manager's unavailability meant she also did not get feedback.
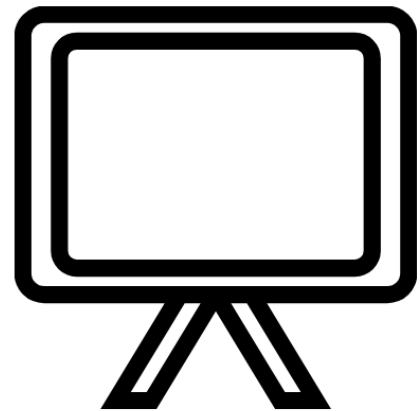
PowerPoint Slides

Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.

> *Employee loyalty begins with employer loyalty.*
>
> Harvey Mackay

Purpose of Onboarding

Onboarding is more than just new hire orientation; it is a continuous process of integrating the new hire into the organization by helping them develop as a team member and offering necessary feedback.

Start Up Costs

When employees leave the organization after only a short time, these start-up costs are a lost investment.

Employee Anxiety

It is normal to feel some anxiety when starting a new job, with all its uncertainty and new information.

Employee Turnover

Employees who are anxious, uncertain about expectations, or otherwise do not feel part of the organization are more likely to leave within the first 90 to 180 days.

Realistic Expectations

It is key that the organization and the new hire's manager have realistic expectations of what the onboarding process can do.

Practical Illustration

- Start Up Costs
- Employee Anxiety
- Employee Turnover
- Realistic Expectations

Module Two: Review Questions

1. Which of the following is true of onboarding?

A. It is complete in a new hire's first day

B. It is a relatively small organizational investment

C. It has no impact on employee retention

D. It is one of the most significant financial investments organizations make

Quick Reference Sheets

Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

Millennial Onboarding
Quick Reference Sheet

Who are Millennials?

Millennials are members of the generation born between **1981** and **1997**. They are a generation that came of age in an **era of increasing technology and economic uncertainty**, both of which shape the way they approach work and life. While millennial employees are often dismissed as lazy or self-involved, in reality their unique approach to work and life can be an asset to organizations that know how to leverage them.

Expectation of work-life balance, high value on personal time
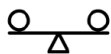
Preference for multitasking

Highly connected and Tech-savvy, via social media and other communication technology

Close to their parents

Desire to be recognized for their efforts, instant gratification and feedback
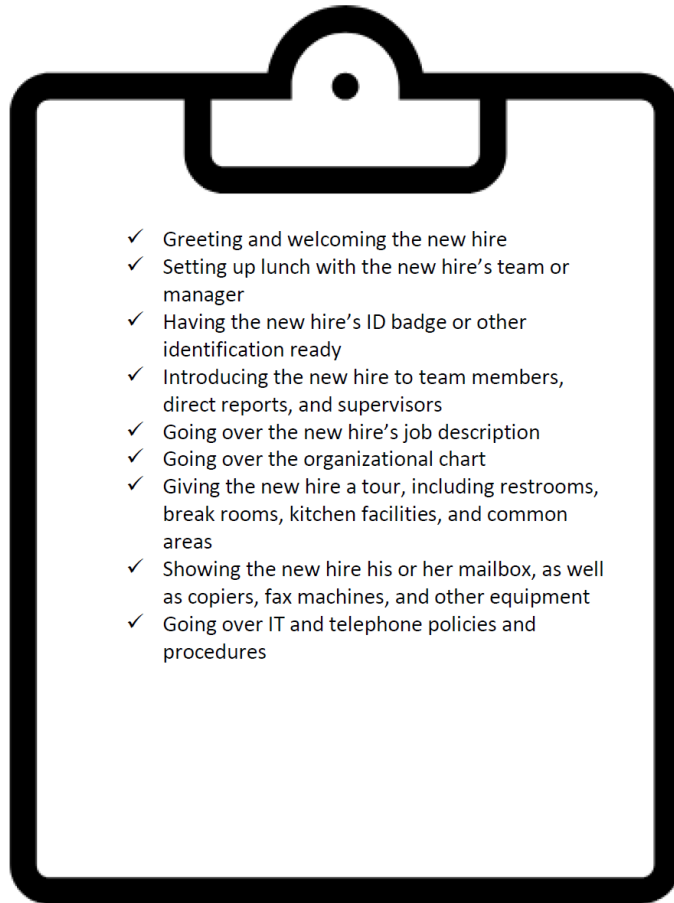
Team-oriented and collaborative

Why Onboarding?

Why invest in an onboarding process rather than just a one-day orientation? A continuous onboarding process not only ensures that new hires have the necessary paperwork filled out and start the job on the right foot, but helps to socialize the new hire into the organization.

Because a new hire's needs and concerns will change as he or she becomes comfortable with different aspects of the job, **a continuous onboarding process** ensures that employees can ask questions or have different needs addressed as they come up. A quality onboarding process helps to **promote employee retention**, which is both a cost savings and contributes to greater continuity among the work team.

A first day checklist can be helpful for both managers and new hires in the onboarding process. A first day checklist helps ensure that the new hire has the most important information they will need by the end of the first work day, and that they have been adequately welcomed into and oriented to the space. Having a standard first day checklist also ensures that there is consistency across onboarding for all new hires.

- ✓ Greeting and welcoming the new hire
- ✓ Setting up lunch with the new hire's team or manager
- ✓ Having the new hire's ID badge or other identification ready
- ✓ Introducing the new hire to team members, direct reports, and supervisors
- ✓ Going over the new hire's job description
- ✓ Going over the organizational chart
- ✓ Giving the new hire a tour, including restrooms, break rooms, kitchen facilities, and common areas
- ✓ Showing the new hire his or her mailbox, as well as copiers, fax machines, and other equipment
- ✓ Going over IT and telephone policies and procedures

Handouts

Each course is provided with a wide range of worksheets. Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.
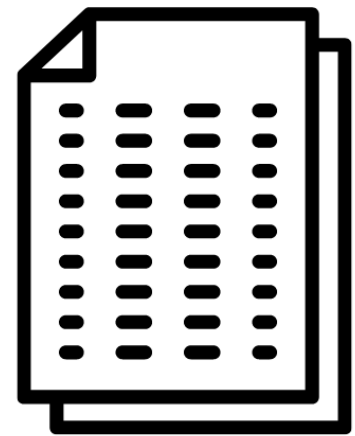
Worksheet 1

Employee Anxiety

In the space, describe a time when you felt anxious as an employee, or things that your own employees express anxiety about. Then discuss steps that were taken, or could have been taken to alleviate that anxiety.

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Icebreaker Nine: When I was 16?

Perform the following activity for an icebreaker:

1. Have participants form teams of 4-6 depending on the size of the class.

2. Have the participants group themselves in pairs.

3. Distribute sticky notes and pens to each participant.

4. Have one participant in the pair share the following when they were 16 years old:

   a. Their favorite hobby

   b. Their favorite movie

   c. The greatest technology

5. Instruct the partner listening to write down the answers given by their partner.

6. Repeat steps four and five for the second partner.

7. Allow 5-6 minutes.

8. Start with a group and have a participant introduce their partner to the class and share their three answers.

9. Go around room until all have shared their partner's name and answers.

10. Point out the differences in interests, movies and technology across generations.

Certificate of Completion

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.
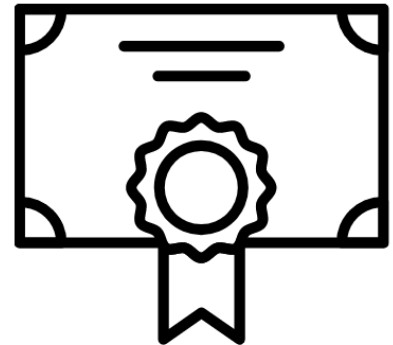
CERTIFICATE OF COMPLETION

[Name]

Has mastered the course
Millennial Onboarding

Awarded this _____ day of _____ e_____, 20 ____

_____

Presenter Name and Title