

Leader's Guide to **Onboarding**

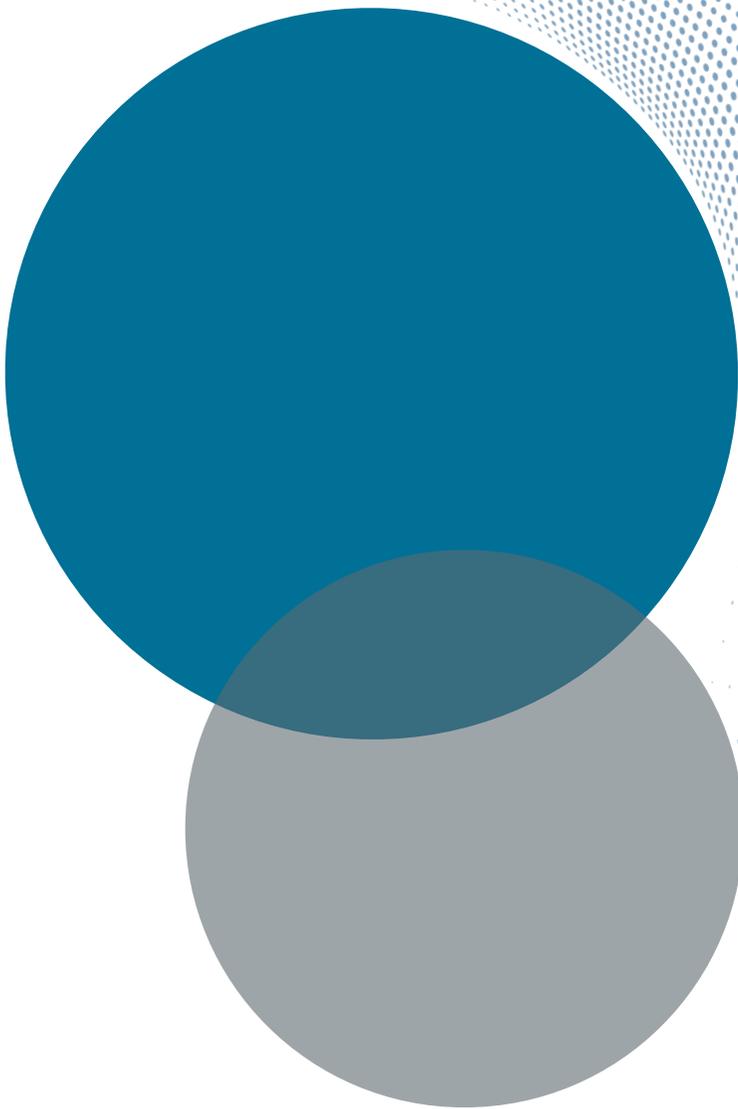


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This guide has been developed to provide general assistance to hiring leaders and those involved in orientation and onboarding processes within the Faculty of Health Sciences at McMaster University. Please feel free to use the information and resources provided within as applicable, however we request that you provide appropriate credit and acknowledgement to the Health Sciences Human Resources Office.

Please note that nothing in this document is meant to supersede any collective agreement. Where a contradiction arises between this document and any collective agreement or policy, the collective agreement or policy will govern.

INTRODUCTION

Onboarding within the Faculty of Health Sciences is a collaborative process that relies on the involvement of numerous members of the Faculty to help new employees become productive and successful contributors to the FHS. As a leader, you play a critical role in facilitating the successful integration of new staff and faculty into the FHS community. Your active and positive involvement in ensuring a successful transition affirms your commitment to the new employee, and helps them quickly become engaged and contributing members of our Faculty.

This Guide is a resource for Hiring Leaders, to help facilitate the successful integration of our new employees into their roles and the FHS community. It provides an overview of the benefits of onboarding, best practice guidelines, the FHS onboarding process, and tools and resources to assist in a smooth and successful transition. The Guide is meant to complement, support and enhance what you are already doing within your department. Being proactive and engaging our new staff and faculty in planned onboarding activities, will assist in ensuring not only their success, but also the success of your department.

WHAT IS ONBOARDING?

“Onboarding is a process that focuses on transferring organizational, team, and role-specific knowledge to new employees. It engages new employees by offering insight into the organization’s culture and strategic direction, providing them with a welcoming experience, and enabling them to consider their career development and plan their personal advancement. “

– Bringing New Hires Up to Speed: How Structured Onboarding Can Help, Conference Board of Canada

Onboarding is the process of welcoming, educating, connecting, and integrating new employees into the organization, providing them with the tools, resources and knowledge to be successful and productive members of our Faculty community. Onboarding begins as soon as the offer of employment is accepted. An effective onboarding process instills a sense of connection to the organization and creates a drive to contribute. Best practices of a successful onboarding program include:

- Creates a positive new hire experience for both the employee and the Faculty
- Celebrates and extends a warm welcome
- Uses your best employee’s to welcome new ones
- Helps build the new hire’s internal network
- Concentrates on your culture and values
- Defines responsibilities and sets performance expectations

The **goal of onboarding** within FHS is to align new employees with our Faculty’s culture, mission and values, with a focus on strengthening the employee’s connection to the organization and its people, shortening the learning curve, and integrating new hires into the Faculty, their department, and their role faster. Onboarding provides a more strategic plan for employee success than orientation alone.

ORIENTATION VERSUS ONBOARDING

Orientation	Onboarding
<ul style="list-style-type: none"> • Is an event • Involves a first day session or first week of activities • For the most part is a one-way flow of information to the new employee • Is generally an initiative of human resources • Provides standard information to the new employee 	<ul style="list-style-type: none"> • Is a process • Lasts anywhere from three months to a year, depending on the position • Is the shared responsibility of human resources, the hiring manager and the new employee • Integrates the employee into their new work environment, providing a greater understanding of the organization’s mission, values, and culture; and how the employee and their role fits into the larger organizational context

BENEFITS OF EFFECTIVE ONBOARDING

"Onboarding leads to early engagement of new employees by giving them insight into the organization's culture and strategic direction, making them feel welcome within the organization, and helping them plan their own career development and personal advancement." – Bringing New Hires Up to Speed: How Structured Onboarding Can Help, Conference Board of Canada

EFFECTIVE ONBOARDING:

- Helps employees to contribute and make an impact quickly, enhancing individual and group productivity
- Boosts engagement of new hires
- Reduces costs from low productivity, errors, anxiety and dependence on other staff/faculty
- Improves retention and reduces turnover costs
- Reduces anxiety and stress for the new employee
- Fosters relationship building and networking
- Improves the organization's reputation as an employer of choice
- Assists in making faculty and staff feel welcome, comfortable, prepared and supported
- Strengthens the employee's affiliation to the Faculty and builds loyalty

An organization's approach to onboarding is pivotal for both the employee and the organization, as **86 percent** of new hires make their decision about whether or not to stay within their first six months on the job.
(Aberdeen Group)

FACULTY OF HEALTH SCIENCES ONBOARDING PROCESS

The Faculty of Health Sciences is committed to its employees and to the investment of ensuring onboarding and orientation is welcoming, informative and meaningful. A successful program shapes a new employee's experience and can have a lasting impression.

GOALS OF FHS ONBOARDING PROCESS

- Employee feels welcomed, comfortable and supported from Day One
- Experience reaffirms employee's view that the Faculty of Health Sciences is a great place to work
- Facilitates smooth integration into department, Faculty and McMaster University
- Accelerates development of networks and critical relationships
- Lays the foundation for a successful career

FHS ONBOARDING PRINCIPLES

- Build connection from start as an extension of a positive candidate experience
- Emphasize people over paperwork
- Celebrate and extend a warm welcome
- Use your best employee's to welcome new ones
- Customer service is at the heart of the Program
- Considered a partnership between Human Resources, Manager and Employee/Faculty Member
- Ensure consistent orientation and onboarding process for every new hire and transfer

TIPS FOR HIRING LEADERS

- Time invested upfront in planning onboarding activities will help develop your new employee faster.
- Onboarding can be overwhelming for new employees, even those with experience. Check in regularly to make sure things are going well.
- Make use of an FHS Ambassador to assist with the transition.
- Remember that the new employee also has a responsibility in making the onboarding process a success.

FHS/DEPARTMENT ONBOARDING DESIRED OUTCOMES

Your new employee will:

- Understand his/her position outcomes and responsibilities
- Understand departmental goals and the strategic vision of the Faculty and department, and recognize how his/her job contributes to their achievement
- Have a good understanding of departmental procedures, customs and traditions
- Feel like part of the team, and supported by his/her manager and colleagues during their transition to the workplace
- Have access to resources and information necessary to assist in becoming a successful member of the department and the Faculty

FHS HUMAN RESOURCES ONBOARDING PROCESS

The following image provides a high-level overview of the FHS HR onboarding process for new employees, from verbal offer to follow-up. With departments, FHS HR aims to provide a welcoming and supportive introduction to the Faculty of Health Sciences for all new employees and transfers.



ROLES & RESPONSIBILITIES

Welcoming new employees and faculty members is a collaborative effort involving the Hiring Leader, Human Resources and the new employee. As a hiring leader, your role is to create a favourable working environment for new employees and to ensure that their first impressions and experiences are positive. Supporting your new hires throughout the various components of the onboarding process, and leading them through an effective departmental orientation will increase their likelihood of success. HR supports managers by providing resources and initiating the pre-arrival process. Following the recommendations on the Hiring Leader's Checklist (see next page), and delivering a customized departmental orientation will enable you to positively impact your new employee's experience in the Faculty of Health Sciences.

Hiring Leader	FHS Human Resources	New Employee
<ul style="list-style-type: none"> • Supports new employees throughout the onboarding process • Ensures workspace is setup and prepared in advance of the new hire's start date • Provides initial welcome and departmental orientation; clarifies job expectations and facilitates key introductions • Works through the Leader's Onboarding Checklist (found at the end of this document, and online at: https://fhshrwelcome.mcmaster.ca/topic/leaders-onboarding-checklist/) and uses recommended resources • Works closely with Human Resources to ensure alignment of efforts throughout the new employee's welcome experience • Provides regular feedback (both positive and constructive) on performance and identifies supports and resources where needed 	<ul style="list-style-type: none"> • Connects with the new employee in advance of start date to share New Employee Welcome Website, orientation checklist, and enrolment forms • Meets with new employees on their first day to provide a foundational overview of the Faculty and University, reviews new employee welcome package and benefit entitlements, and ensures completion of new hire enrolment forms • Processes relevant new hire documentation in a timely manner • Supports new employees and hiring managers/departments through the onboarding process • Assesses program effectiveness and identifies possible program enhancements 	<ul style="list-style-type: none"> • Uses a self-directed approach to onboarding by accessing orientation resources available (e.g., Health Sciences New Employee Welcome Website) • Meets with Hiring Manager to jointly discuss and understand new role and expectations • Meets with Human Resources on first day for initial orientation to the Faculty, University, and benefit entitlements, and brings any questions or concerns • Completes any necessary training (e.g., Health & Safety, AODA) • Attends McMaster's <i>New Employee Orientation</i> program and any other group specific workshops, e.g., Program for Faculty Development's Faculty Orientation, Postdoctoral Fellow Orientation, Union Orientation • Works through New Employee Checklist (found online at https://fhshrwelcome.mcmaster.ca/topic/before-your-arrival/)

LEADER'S ONBOARDING CHECKLIST

The onboarding process for new employees begins the moment they accept their offer. This checklist is designed to assist Hiring Leader's with the onboarding process, from preparation for the new employee's arrival to their successful integration into their department and the Faculty. You may wish to add additional activities and/or delegate tasks to another member of your team as appropriate.

Before Arrival

Outcomes: *A welcoming work environment with a fully equipped workspace, prepared to welcome new employee and affirm their decision that the FHS is a great place to work.*

- Notify HR of successful candidate; provide relevant information for offer (e.g., start date, starting salary, reporting details, position details, job description)
- Receive notification from HR regarding acceptance of offer and confirm time for new employee to meet with HR; you will be copied on all HR communications with your new employee regarding enrolment forms, MAC ID details, etc.
- Phone/email your new hire to officially welcome them to the FHS and answer any immediate questions they may have (once offer from HR accepted); clarify what time you expect him/her to arrive on their first day, location of department, parking, work attire, etc.; provide a contact number in the event any questions arise prior to first day, confirm any workplace accommodations required
- Set up workspace, equipment (computer, phone), office supplies, business cards, keys, security access (as applicable) and any required technology access (Mosaic, shared drives, printers, etc.)
- Ensure new hire is added to relevant email distribution lists or other internal communication tools; update Faculty/Staff directory with new employee's contact information, and update department website as applicable
- Assemble a department orientation package that includes job description, key contacts, organizational charts, strategic plans and priorities, specific policies and procedures that pertain to their role, and any other relevant information
- Prepare a schedule for the employee's first 1-2 weeks, including the new hire's first assignment

First Days

Outcomes: *Employee feels welcomed, comfortable, prepared and supported; begins to understand the position and performance expectations.*

- Clear your schedule for your employee's first day to greet them personally, and be available to check-in at the end of the day to answer any questions
- Send welcome email to team with short bio and what the new employee will be doing as part of your team; copy new hire
- Review department orientation package, providing an overview of the department mission, structure and priorities
- Provide orientation to role, review job description, duties and expectations, clarify schedule (including break times) and any required training, set some early goals
- Discuss procedures for scheduling time off, unexpected absences, what to do if they will be late, work schedule, hours, breaks, overtime, pay schedule, vacation, sick time, statutory holidays, etc.
- Provide computer and phone orientation, use of shared drives, voicemail, email (ensure able to activate McMaster email)
- Introduce to Mosaic and have a training plan in place if required for role
- Review information about what to do in case of emergency, identify any procedures unique to the employee's work location
- Introduce to colleagues, discuss the formal and informal culture, values and practices of the Faculty and department
- Give a tour of the employee's new environment including location of washrooms, kitchen and appliances (if applicable), copy/fax machine, emergency exits, office supplies, cafeteria, fire extinguishers, first aid kit
- Distribute assigned key to office
- Provide parking chit for first day to allow time to sort out parking
- Review the Health Sciences New Employee website with the employee and answer any questions the employee may have

- Provide time to attend HR Welcome Meeting to review and complete all necessary new hire documentation
- Assign a manageable assignment within the first week, be prepared to help the new hire sort priorities at first
- Make performance standards clear and let the associate know how his or her performance will be measured. Discuss any probationary review timing. Give feedback immediately on how he or she is doing
- Provide time to meet with FHS Ambassador

First Weeks

Outcomes: *New employee builds knowledge of internal processes and performance expectations; feels settled into the new work environment. Employee is cognizant of his/her performance relative to the position and expectations; continues to develop, learn about the organization, and build relationships. Ensure the employee feels part of the team and understands their role and expectations.*

- Recommend McMaster's *New Employee Orientation* program, and provide time for employee to attend
- Ensure employee completes required health & safety and AODA training (and any other required)
- Review incident/injury reporting, working alone policy, and SOPs related to department and role
- Offer an ergonomic assessment of work station, to be provided by FHS Safety Office
- Assist and provide any necessary training in Mosaic
- Review in detail responsibilities and expectations and explain how the role fits in the team and department
- Explain your own responsibilities and current priorities and how the employee's job supports them
- Review department guidelines and any applicable university policies impacting their work
- Set expectation for communication with the employee, will you have one on one meetings, how often will they occur, who will schedule them, do you have an open door policy, etc.
- Check in regularly with employee, answer questions, review expectations and set performance goals and priorities

First Months

Outcomes: *Employee is becoming fully aware of his/her role and responsibilities, beginning to work independently and produce meaningful work. He/she continues to feel acclimated to the environment both functionally and socially. Ensure the employee is engaged and a valued contributor in meeting organizational goals.*

- Complete 30-day check-in with new employee, in-person, relaxed environment (see Tools & Resources for sample)
- Schedule regular meetings to touch base, review and clarify performance objectives, expectations, project updates, and answer questions
- Continue to provide regular informal feedback on an ongoing basis
- Provide information about university events and activities related to the employee's interests
- Conduct interim/probationary review as appropriate
- Explain the performance review process and create written performance goals and professional development goals

First Year

Outcomes: *Employee is fully engaged in new role – applies skills and knowledge, makes sound decisions, contributes to team goals, understands how his/her assignments affect others in the organization, and develops effective working relationships. He/she has gained greater confidence in position, begins to take on additional assignments and works with some level of autonomy. Ensure the employee is motivated and performing at full working level, with full support of supervisor and team.*

- Continue to regularly review and clarify performance objectives and expectations, discuss project updates and answer questions
- Provide positive coaching, review issues or challenges, and provide regular, informal feedback
- Discuss career development and plans for the future

ONBOARDING TOOLS & RESOURCES

As the hiring leader, you are the most influential person in the onboarding process. You are the link that integrates new employees into the organization. This section of the Guide provides you with a few tools and resources to assist in your role as the hiring leader. Please feel free to make the resources your own, as they are only suggested templates and formats.

Welcome Announcement Template

*Adapted from Ryerson University's 'Leaders' Guide to Onboarding'

The following template is designed to help leaders introduce a new member to their team. Be sure to copy your new employee on your welcome announcement. Please note that this is only a suggested format. As you make changes to personalize the email, please keep three things in mind:

1. Focus on how excited you are to welcome the new team member.
2. Provide background information on your new team member and their responsibilities, but keep it brief.
3. Encourage the new employee's colleagues to reach out to help the new employee acclimate to his/her new role.

Template Letter:

To: Team
From: Hiring Leader

Subject: Welcome [New Employee]

Dear [team members],

I am very pleased to announce that [New Employee] will be joining our team as [title] on [start date]. [He/She] will be responsible for [provide a brief description of role].

[New Employee] comes to us from [previous employer/school], where they [provide a brief description of relevant work history/education].

Please join me in welcoming [New Employee]. I encourage you to connect with [New Employee] to welcome [him/her] to our team.

Best regards,
[Name of Manager]

Department Orientation Package Template

The following list contains suggested elements to include in a department orientation package for new employees. Employees will receive information about the Faculty and applicable benefits during their orientation with FHS Human Resources.

Package Contents:

- Copy of job description
- Schedule for first week
- Key contact information and resource list (who to call for what)
- General introduction to department:
 - Organizational charts
 - Department vision, mission, values, strategic plans and priorities
 - Acronyms
 - Regular department meetings
- Relevant group email lists
- Key people to meet with
- Relevant policies and procedures
- Health & Safety information, including emergency procedures for location
- Pay schedule
- Hours of work, vacation time, sick leave, breaks, etc.
- Holiday schedule
- Probationary Period Performance Review template/Annual Objectives and Development Goals

First Day Schedule (Sample)

Your employee's first day in their new role will be memorable. Help make it a positive experience by planning their schedule in advance.

Morning

- Greet the employee, introduce him/her to their workspace
- Review department orientation package and first assignment
- Provide facilities access information, security information, and keys
- Answer any immediate questions the employee may have
- Introduce employee to co-workers
- Provide time for your new hire to meet with their HR representative for Faculty and benefits orientation and to complete any required paperwork
- Provide a tour of the immediate facilities (give personally, or assign a team member)
- Give employee some time to get acquainted with work space (suggest reviewing New Employee Welcome Website)

Lunch

- Pre-arrange plans for lunch with you, team member and/or others, if possible

Afternoon

- Schedule time for employee to become familiar with computer systems (e.g., Mosaic)
- Arrange for employee to receive any instructions and codes for photocopier, fax, and other equipment they may use
- Go over any pertinent office policies and procedures (office hours, lunches and break times, phone coverage, etc.)
- Allow time for the employee to settle in and review all of the information provided to him/her throughout the day
- Meet with the employee to debrief the day, answer any pending questions, and provide and explain the schedule and activities for the next several days

Check-In Interview Template

A new employee's first days, weeks and months can be overwhelming as they try to sort through a wealth of information and adjust to their new environment and role. Checking-in regularly with your new employee over the first several months will help to provide clarity to their role, enhance performance, and assist in the development of a positive working relationship.

Suggested questions for discussion include:

*Adapted from Brandon University's Onboarding Guide for the Hiring Manager: 30-60-90 Day Check-in Questions

- So far, is the job what you expected it to be?
- Do you feel you have the information, tools, and resources you need to do your job successfully? Are you experiencing any challenges in particular that I can assist you with?
- Are you feeling comfortable within the organization in general? Do you feel like you have a good understanding of your role within the organization?
- Is there any specific training you feel you need to be successful?
- Do you feel you are receiving enough feedback and assistance from me?
- What tasks/projects are you enjoying the most? What are some elements of the position that you are not enjoying as much? Is this because you have not been given the proper tools or training to be successful, or because you simply do not prefer this kind of work in general?
- Are there any areas where you feel you could benefit from additional support or training?

Health Sciences New Employee Welcome Website

<http://fhshrwelcome.mcmaster.ca>

The Health Sciences New Employee Welcome Website was created to share everything we think new faculty and staff might need or want to know about life in the Faculty of Health Sciences. The purpose of the website is to assist new employees and hiring leaders through the onboarding journey, while building community and creating a connection to the Faculty of Health Sciences.

FHS HR shares the Welcome Website with new employees during their initial communications prior to the new employee's arrival, and again during their Welcome & Orientation (previously known as a "sign-in") meeting. Employees can follow along with the orientation checklists provided (from 'Before Your Arrival, through to 'First Days', 'First Weeks' and 'First Months'). Additionally the website allows employees to learn about the Faculty, and discover the many benefits of being part of McMaster and the FHS community.

Health & Safety Orientation Checklist

The Faculty of Health Sciences Safety Office has created Health & Safety orientation checklists for both office and laboratory environments. The checklists provide managers with a list of topics for review with new employees to ensure appropriate training is in place, and that all employees are aware of proper protocols, procedures, and reporting requirements.

Office Environment Orientation

<https://fhs.mcmaster.ca/safetyoffice/documents/HealthandSafetyOrientationChecklist-OfficeEnvironment.pdf>

Laboratory Environment Orientation

<https://fhs.mcmaster.ca/safetyoffice/documents/HealthandSafetyOrientationChecklist-LaboratoryEnvironment.pdf>

New Employee Orientation Program

<http://hr.mcmaster.ca/employees/development/new-employees>

McMaster's New Employee Orientation Program (NEO) is delivered by the Centre for Continuing Education and sponsored by Human Resources Services. All continuing employees, or those working in a contract position greater than 12 months are eligible to attend. This is a one-day program, offered at various points throughout the year. As a hiring leader, you should encourage your new employees to sign-up and attend this highly informative session. Employees will learn about McMaster's mission, structure, culture and key services, and have the opportunity to network with colleagues from across the University and explore the campus environment.

FHS Ambassador Program

[Download our FHS Ambassador Program Guide on the Health Sciences New Employee Welcome Site](https://fhshrwelcome.mcmaster.ca/topic/ambassador-program/)

<https://fhshrwelcome.mcmaster.ca/topic/ambassador-program/>

What is the FHS Ambassador Program?

The Faculty of Health Sciences recognizes the importance of welcoming new employees to the Faculty, helping them establish a sense of belonging and building a personal connection to the Faculty and University community right from the start. The FHS Ambassador Program is a volunteer initiative, led by Health Sciences Human Resources, that connects current employees – who have a pride in and passion for working in the FHS, with new hires to provide advice and guidance during the orientation period. The goal of the program is to make the new employee feel welcomed and part of our Faculty, reduce some of the initial uncertainty around starting in a new organization, and help them integrate into their new environment with ease and confidence.

Who is an FHS Ambassador?

An FHS Ambassador is a dedicated member of the Faculty of Health Sciences that partners with new employees during their few months of working in the Faculty and at McMaster University. Your Ambassador may offer advice regarding the day-to-day aspects of working in the Faculty, and provide encouragement and guidance as they introduce you to the Faculty culture.

Ambassador Characteristics:

- Proud to work for the Faculty of Health Sciences and McMaster University
- Wants to be an FHS Ambassador
- Friendly, with a positive attitude
- Well regarded and respected by others
- Strong communication and interpersonal skills
- Demonstrated high performance
- Understands the Faculty culture and environment
- Will make time to be accessible and available to the new employee

Ambassador Responsibilities:

- Provide an open, positive space for conversation always respecting confidentiality
- Be a contact for general information on norms and day to day life in the Faculty
- Be professional and maintain a high level of respect and trust
- Follow up with the new employee on a weekly basis
- Make the new employee feel welcome by answering questions and helping navigate the organization's culture

How does the FHS Ambassador Program work?

Any member of the FHS staff or faculty community may volunteer and apply to be considered for an Ambassador position, subject to selection criteria set out in the FHS Ambassador Guide. Once selected, Ambassadors will be periodically invited to take part in a new employees orientation as their FHS Ambassador. Initial introductions will be facilitated through FHS HR. Ideally FHS Ambassadors will set up a first meeting with the new employee over coffee/tea (complimentary through FHS HR), and continue contact over the next 30-60 days, based on need and interest.

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