Successful Onboarding

Introduction

“Before you are a leader, success is all about growing yourself. When you become a leader, success is all about growing others.”
~ Jack Welch

Whether it is an entry-level employee embarking on his first job or a seasoned professional taking her talents to a new environment, starting a new job is a daunting prospect. Leaving the known for the unknown can feel like the first day of middle school – fraught with questions about fitting in. Thoughtful and intentional onboarding practices can reduce new employee anxiety and ensure acclimation to your work environment. Effective onboarding also reduces turnover by equipping new staff members with the tools and training for success. Also, it establishes the foundation for productive work-based relationships.

The most successful onboarding programs focus on helping new hires to gain a thorough understanding of the association’s mission and strategic priorities as well as the policies and procedures that make the bar run. It is not simply about the do’s and don’ts. Throughout the process, it is essential to continually monitor the employee’s mastery of both the hard and soft skills necessary for excelling and growing in their association role. By paying attention early, you can adjust your training and coaching to suit the circumstances.

This guide walks you through the stages of onboarding from recruitment through the first-year review. Each segment of the process has an accompanying checklist. Not all items on the checklists will be appropriate for every job or every size association. The checklists are templates for you to adapt according to your needs.
Onboarding begins before the offer is made and the candidate accepts. The hiring process should set a tone that reflects your culture and expectations. Take your time with the process to ensure that the right questions get asked, and gut checks are verified. Attentiveness before the official start date can save a world of hurt. Most voluntary and involuntary turnover happens in the first year of employment.

The job posting should reflect not only skill sets such as competence in excel but as just as importantly, emotional intelligence and the soft skills required to thrive in your association. Be as specific as possible. "Team-player" can mean everything from not gossiping about other staff members to participating in an all hands on deck to pack for the Bench-Bar Conference. The same thing goes for the generic terms like “fast-paced” and “high pressure.”

If you value collaboration and cross-training, include staff who will be working directly with the person under consideration members in the hiring process. Think about adding a staff member from another department who has similar job responsibilities to the interviewee. People who actually do the job will have an insightful process and situational question. An LRS coordinator is likely to explore handling particular types of callers rather than asking, “What would you do to get someone off the phone who won’t stop talking?”

The crucial questions for a department or a small staff organization are: “Will this person be a valuable and contributing member of our team?” and “Will this person enrich our team with experience or perspective?”

To find out about soft skills and hidden talents, broaden your interview questions beyond the typical. By delving into hobbies, reading habits, and dreams you are more likely to discover motivation and values. These will help you to discern the cultural fit.

**Hot Tip**

Never hire out of pain and desperation.
Recruitment Process
Director/Manager

Hot Tip:
Make sure not to blindside interviewees, tell them who they will be meeting with when setting up the appointment.

Making the Offer

As you assess vacancies before initiating the hiring process for director or manager positions, consider including direct reports. Those with a long tenure may be able to assess who has been successful in the job and why. Ask yourself, "What is our management team missing?" If you lead a team of conformists and you lack innovation, you may want to round out your culture with a free thinker or someone who is a risk-taker.

Ask candidates about how they view their professional development. Look for those who are self-motivated who seek opportunities.

Just as including staff in the hiring process is essential for administrative and coordinator positions, it is equally, if not more important, when building your management team. Include other directors at the second or third interview stage. Ask, "What are the key points of contact for this position?" and include those staff members accordingly. Incorporate role-playing a board presentation or questions at a staff Town Hall meeting in the interview.

Some organizations have a director or C-suite finalists participate in a Myers-Briggs or DISC-type assessment to see where the candidate fits relative to the rest of the team.

Many of our bar associations aren't large enough to have a manager or director of Human resources to handle the offer, so the task often falls to the executive director or the finance or administrative manager. Whoever makes the offer by phone should confirm the conversation in a follow-up email. If the offer is accepted, it should be confirmed with a formal offer letter which includes:

- salary per pay period and benefits,
- position title,
- name of the manager,
- the agreed-upon start date,
- disclaimer language that the letter is not a contract.

Make sure that a copy of the letter is the personnel file.
**Preboarding**

**Hot Tip**
Announce the new hire to all of the staff and including some background information. If possible include a photo.

**Day One**

**Hot Tip**
Don’t have the employee sign-off the employee handbook on day one. It will make more sense at the end of week one or two than it will after day one.

Get ready for the new employee’s arrival. Depending on the size of your organization, you may want to think about creating an employee onboarding portal. Many payroll and accounting systems have this capability. Consider having onerous paperwork completed online before the start date. There is nothing that can kill the enthusiasm of the first day like IRS forms. Think strategically and methodically by using a preparation checklist.

For director or manager positions, think about what background materials would be useful. Share the documents in advance and ask that they be reviewed before the start date. Send links to pertinent pages on your website and forward the latest issues of the *NABE Bulletin* and *Bar Leader Weekly* along with your newsletter or journal.

Be ready at the front door to greet the new staff member. Give them a rundown of their first day. There is little else that you will do on day one that is more important than preparing an employee for success. Create a dynamic welcome while avoiding information overload.

Make sure that all systems are go. Confirm that the phone will ring, email address is in the system, the key card opens the door, and the computer plugged in.

Pairing the new employee with a buddy establishes a relationship early on and informal training dynamic.

If you haven’t taken care of the paperwork beforehand, schedule a time during the first day to review the benefit options, and complete the requisite forms. While it is tempting to get that stuff out of the way, make sure that the new employee feels supported and comfortable in their surroundings.

Check-in and ask questions about what the employee took away from the scheduled activities. On the spot feedback in the best sort.

Make sure to schedule some downtime to reflect and absorb the information presented.
**Week One**

**Hot Tip**
Provide new employees with a list of local restaurants and take out menus in their welcome packet. You might want to include a $10 gift card to a favorite place.

A best practice to consider is mapping out the first week of training before the new team member's arrival. Doing so avoids the day two, “now what” feeling. Schedule the meetings so that they are on the Outlook calendar on day one. The schedule should blend instructional and experiential training with self-directed reading and review.

Lots of training takes place the first week from how to fill out a timesheet to how to do a member lookup. While some employees learn by doing, others will prefer an instructional style. Ensure that there is a combined approach with an opportunity for reinforcement and follow-up.

At the DC Bar a department head schedules constructive reading time for new employees. Material may include back issues of the bar journal, program flyers, policy and procedure manuals, annual reports, and forms. Supervisors follow-up with questions and discussion of the material presented.

While many organizations rely on automated systems, the hub activity for many bar associations remains the front desk. An hour listening to incoming calls and how the receptionist fields them is an illuminating experience.

Check-ins during week one are crucial to establishing both rapport and support. While you don’t want to look for trouble where there is none, be wary if there are no questions, and everything is reported to be “fine,” probe deeper. Think about taking your check-ins outside of the confines of the office or cube. Take a walking meeting, make a trip to the local coffee spot, or sit in the board room.
Weeks Two-Four

Hot Tip
Make sure to introduce all new employees to members either in person, on the website, or in the newsletter. Include a picture!

Since so many organizational systems connect to one another, employees need to understand both process and information flow. Regardless of position, ensure that the new team member has the opportunity to participate and observe an event such as a CLE program. It helps them to see where and how their work connects to the greater mission of the association.

Equally useful is shadowing another employee with similar or related responsibilities. Think about having a committee liaison shadow another liaison at a committee meeting to observe them in action. For smaller staff these also are occasions for cross-training.

Depending upon the position, week two should bring a normalizing of an employee's schedule. Although colleague meetings and training continue, the focus turns to job responsibilities. Shorter duration tasks may be assigned. If the new team member is a director, she can begin focusing on getting to know her direct reports and assessing the status of ongoing projects.

As you close out the first month, begin goal setting not only around work product but comfort level with systems. Set interim benchmarks for three-month, six-month, nine-month, and twelve-month goals. Goals should be specific and measurable. Align the goals with the association's yearly calendar and performance review cycles.

Months Two-Three

Avoid the term “probationary period” for the first three months. Use a more positive word such as “introductory” or “welcome” period.

Beyond training and competency with process and procedures, throughout the initial three months of employment, it is appropriate to gauge capacity and ability to work independently.

During this introductory period, provide further opportunities for observation and participation in association events. Volunteer-staff relations can be tricky to navigate regardless of job responsibilities — coach to establish boundaries and create mutual respect and trust.

Wrap-up the first three months with a performance assessment and goal setting for the six-month mark. Also, obtain feedback on the onboarding process.
**Months Four-Six**

**Hot Tip**
*If more than one employee came on board during the period, have a six-month check-in for all new hires to debrief the process.*

**Months Six-Twelve**

**Hot Tip**
*Create opportunities for informal staff interaction, such as potlucks.*

Employees should be working toward their six-month goals for work product and competencies. New managers should be building the confidence of their teams and meeting the change challenge. Pay attention to how the unwritten rules are being observed. Typically, employees don’t succeed because they lack the skills but because they don’t adapt to the cultural norms of the organization.

At the six-month mark, conduct a performance update to ensure that expectations are clear and progress toward goals. Check-in with other staff to see how the employee is doing. Consider having the employee do self-evaluation to ensure that you are on the same page.

This also is the time to explore professional development opportunities and expectations with the staffer. Discuss opportunities for professional development both formal and informal. Information possibilities include developing a reading list of books, articles, and newsletters and listing list of podcasts.

As staff members take on more independent responsibility, use debriefings to assess self-awareness, process familiarity, and opportunities for improvement. During this period of acclimation, the staff member should be taking ownership of their job and be comfortable making suggestions.

At some point during the year schedule, an off-site staff retreat. The time and money are well worth the investment to reinforce collaboration, trust, and camaraderie.

Celebrate the employee’s first year with a note, cupcakes, and healthy snacks.
Interview Questions You Should Be Asking

Often our greatest strength also is our greatest weakness. What is that for you?

When you are on your home from the office thinking, "Wow, this was a great day," what did that day look like for you? What does it look like when you feel that is was "lousy day?"

What skills or expertise would you like to continue to develop?

Is there a skill that you would like to learn?

What attracted you about the job posting/position description?

What three things made you successful in your current or last position?

What do you do for fun?

Where do you see yourself in five years? What are you doing?

Tell me about a mistake you made and how you handled it.

If you could invite any three people living or dead – excluding your family – to dinner, who would invite? What would you serve?

What is the one thing at which you are truly an expert?

How would your supervisor describe you?

Directors and Managers

As priorities change, how to communicate with and adapt your team?

Can you give me an example of a situation where you had an employee who wasn’t meeting performance expectations? How did you handle it?

Is there something in your professional decision-making that you wish you could go back and fix?

Who are your role models and mentors? How have you used them?

What do you read for fun? What do you read that is job-related? What podcasts to you listen to/
Checklist for Pre-arrival Onboarding

☐ Send an email announcement to all of the staff announcing the hire.
   ⇒ Background
   ⇒ Title
   ⇒ Supervisor
   ⇒ Office location
   ⇒ Hours

☐ Send a welcome note or email.

☐ Send an email to the team member outlining what to expect on the first day:
   ⇒ Parking or public transportation options
   ⇒ Arrival time
   ⇒ Dress code
   ⇒ Any events that will be in the building that day
   ⇒ Lunch (Going out? Eating in?)
   ⇒ Schedule of activities
      o Completing the Human Resources paperwork
      o Orientation
      o Meetings scheduled and with whom

☐ Add new employee in any systems such as payroll or the HR management portal

☐ Arrange for an email address and add the employee to appropriate distribution lists

☐ Order business cards, notepads, and routing slips

☐ Order electronic key card

☐ Add the employee to the security system contact list

☐ Create stationary template

☐ Prepare the Workspace
   ⇒ Test equipment
   ⇒ Order starter supplies
   ⇒ Clean the workspace

☐ Schedule First Week Meetings, Training, Touchpoints, and Reading Time
   ⇒ Orientation
   ⇒ Telephone system
   ⇒ Video conference system
   ⇒ Payroll or Timekeeping System
⇒ MMS, CMS, and CRM
⇒ Specialized software
⇒ Staff or department meetings
⇒ Security and Fire Drills
⇒ Reading time for manuals, reports, and other background material
⇒ Daily end of the day recaps and check-ins

☐ Prepare the First Day Packet of Informational and Administrative Forms

Administrative
- IRS forms
- Benefit forms
- Photo permission form
- Employee Manual*
- Log-in and Password information for various systems

Informational
- Association Organization Chart
- Board Roster
- Bylaws
- Calendar of upcoming events
- Department Organization Chart
- The latest issue of newsletter or journal
- Network Drive Map and naming conventions
- Operations Manual
- Reading material
- Telephone list by name and by topic

☐ Prepare the Welcome to the Office
- Bar tchotchkes
- Mug
- Welcome card signed by the staff
- List of nearby places to eat
- Gift card for coffee or lunch at a local eatery

☐ Assign a “buddy”

☐ Send email Outlook Invites for First Week Meetings and Trainings

☐ Send confirmation email two days before the start. Check on food allergies or preferences.

☐ Compile a list of stakeholder contacts for introductions and outreach
Checklist for Day One

☐ Greet at the front door at the appointed arrival time

☐ Welcome to your new office
  ▪ Coffee or tea
  ▪ Hang up your coat
  ▪ Here is the restroom

☐ Review the day’s schedule
  ▪ HR and payroll paperwork
  ▪ Tour of the offices with introductions
  ▪ Orientation
  ▪ Lunch
  ▪ Beyond the basic supplies (what is the budget allocation for ordering specific supplies, how are they requested, who signs off)
  ▪ Headshot for the website staff listing and intranet
  ▪ Check-ins

☐ Tour the Bar Center
  ▪ Security
  ▪ Kitchen or lunchroom etiquette
  ▪ Introductions as you go
  ▪ Recycling
  ▪ After-hours access

☐ Buddy introduction

☐ Welcome on social media channels and update website contact information

☐ Orientation
  ⇒ General policies
  ⇒ Workplace culture
  ⇒ Office equipment use

☐ Lunch with staff team

☐ Time for special reading with a check-in about the reading

☐ Confirm the rest of the weekly schedule

☐ End of the day check-in
Checklist for Week One

☐ Morning check-in to review the calendar

☐ Meet with colleagues

☐ Attend an event like a CLE program

☐ Scheduled reading time and check-in
  ▪ Website
  ▪ Reports
  ▪ Manuals
  ▪ Publications

☐ Schedule volunteer and other stakeholder introductions

☐ Continue technical training

☐ Daily check-ins

☐ Training activities

☐ Set-up employee shadowing

☐ Review of employment policies and cultural expectations

☐ Enroll in NABE

☐ Spend an hour at the front desk listening to calls

☐ Schedule Myers-Briggs, DISC or other assessment tool
<table>
<thead>
<tr>
<th>Time</th>
<th>Mon-3</th>
<th>Tue-4</th>
<th>Wed-5</th>
<th>Thu-6</th>
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<td><strong>8 AM</strong></td>
<td>Arrive</td>
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<td>Settle In</td>
<td>Training</td>
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<td><strong>9 AM</strong></td>
<td>Review of the Day-Supervisor</td>
<td>MMS &amp; CRM</td>
<td>Meet with Finance</td>
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<td><strong>10 AM</strong></td>
<td>Attend All Hands</td>
<td>Colleague Meetings</td>
<td>Meeting Prep</td>
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<td>Tour of the Building</td>
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<td>Your Job</td>
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<td>Meet Your Buddy</td>
<td>Ice Breaker</td>
<td>Intersections</td>
<td>Goals</td>
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<td>Staff Intros</td>
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<td>XYZ Committee</td>
<td>Meeting</td>
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<td>Attend Brown Bag</td>
<td>Lunch with Buddy</td>
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<td>Meet Members</td>
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<td>(Listening)</td>
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<td>Organize Workspace</td>
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Checklist for Weeks Two-Three

☐ Review the performance management process and begin goal setting
  ▪ Align with the annual performance review process
    ⇒ Three months
    ⇒ Six months
    ⇒ Nine months
    ⇒ Twelve months

☐ Assign Short-Term Projects

☐ Attend Department/Division Staff Meetings (C-Level, Department Heads)

☐ Walk-through for upcoming events such as board meetings

☐ Walk-through time recording and payroll submission

☐ Schedule daily check-ins

☐ Review email etiquette & social media policies

☐ Review yearly cycle of activities and employee’s Role (note any travel that may be required

☐ Assess skill training needs and arrange for additional skills training

☐ Check-in on pay day to make sure everything was accurate

☐ Introduce new staff member in the journal or newsletter

☐ Schedule coffee with the CSE (large organizations)
Checklist for Months Two-Three

☐ Schedule weekly check-ins
  ▪ Check for roadblocks

☐ Debrief conference calls and committee meetings

☐ Walk-through travel reimbursement process and review forms

☐ Take a field trip to a sponsor, member or vendor

☐ Continue outreach

☐ Participate in NABE webinars and drop-in discussions

☐ Monitor, support, and facilitate professional development plan and goals

Checklist for Months Four-Six

☐ Schedule weekly check-ins

☐ Schedule professional development opportunities
  ▪ NABE meetings
  ▪ Local professional organizations

☐ Debrief committee meetings (or other events)

☐ Take corrective action as necessary

☐ Attend a departmental staff meeting

Checklist for Months Six-Twelve

☐ Schedule weekly check-ins

☐ Request weekly recaps of accomplishments and red flags

☐ Debrief events & projects

☐ Conduct performance updates at six, nine and twelve months

☐ Continue introductions as you work through the cycle

☐ Hold an off-site staff retreat

☐ Celebrate the first anniversary with 🎉