



# SUCCESSFUL ONBOARDING

**ENGAGEMENT-ENERGY-MOTIVATION-PURPOSE**  
**ENTHUSIASM, INVOLVEMENT, COMMITMENT, CONFIDENCE**



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# EMPLOYEE ENGAGEMENT

- \*Increases Productivity & Efficiency**
- \*Improves Morale**
- \*Reduces Absenteeism**
- \*Provides For Better Customer Service**




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## “Should I Stay Or Should I Go?”

*The Clash*



**85%**  
of employees are not engaged in the workplace

Leaving 15% that are.  
This is a global average.  
But only 33% of U.S.  
employees ARE engaged at work!

### What are potential employees looking for?

- Pay cut is OK for the ideal job
- Pay Increase? Not necessarily
- Positive relationships within
- Work/Life Balance
- Good Company Culture

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## PREBOARDING

This happens before the new hire even walks through the door!

Pre-arrival preparation ensures that everything is in place for a smooth first day, which sets a positive tone & minimizes first day jitters.

HR, and in some cases the Department Manager, can work together to organize an agenda for the first day. This will help everyone stay on task and provides the new hire a sense of structure in an environment that is brand new to him/her.

## CREATE AN ONBOARDING CHECKLIST!

**OmniTel Onboarding Checklist**

This onboarding checklist will help ensure our new hires are set up for success in their new role and will make sure we don't miss any critical steps. Be sure to begin this process at least one week before the new hire begins.

Employee Name: \_\_\_\_\_ Start Date: \_\_\_\_\_

Manager: \_\_\_\_\_ Department: \_\_\_\_\_

**Preboarding Steps (prior to first day):**


- Call potential new hire to make offer. Be sure to cover all the points of interest.
  - Provide desired deadline to respond back, this can be an email.
- Once position is accepted; verbalize and email the new hire the following:
  - A welcome email confirming the start date.
  - Provide first day instructions on where to meet HR and at what time.
  - Provide an electronic copy of the first day's agenda, job description, Employee Handbook for pre-review, direct deposit information, state and federal W4 forms, I-9 required documents (Driver's ID, SS Card, OR Passport), benefits highlight form and employment application filled out for our records.
- Send IT an email requesting the following:
  - Set up new employee email address.
  - Set up new employee security badge access.
  - Set up new employee for time clock/time sheet access.
  - Provide new employee with software/application authority.
  - Request that necessary devices be obtained and set up for the individual (cell phone, laptop/computer).
- HR will prepare new hire paperwork in advance of their start date.
- HR will schedule a "local" tour to be provided by a manager, on the first day.
- HR to assign a mentor and review the expectations with them.
- Put together a "swag bag" and attire if position requires.

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# ONBOARDING STEPS “Orientation”

*There’s nothing quite like the first day!*

You are setting the tone for the experience & ensuring everything is in place as you welcome the new hire to their work environment, team & responsibilities.



**Onboarding Steps (their first day):**

- “Orientation” On their first day, meet with HR to turn in the necessary forms & obtain signatures.
  - Turn in Direct Deposit Form.
  - Turn in state & federal W4 forms.
  - Turn in I-9; Employment Eligibility Verification -Driver’s ID and SS card copies OR Passport copies.
  - Turn in employment application.
  - Explain the mentor program & who theirs will be.
  - Review safety policies.
  - Describe company’s annual review or evaluation process.
  - Review Employee Handbook highlights, provide them with a hard copy, show where it’s located online & obtain signature that it was reviewed.
  - Show employee our internal employee directory (photos) and provide employee telephone directory worksheet (contact numbers).
  - Take a photo for the internal employee directory (informal pic first 90 days).
  - Provide them their company “swag bag”.
  - Provide security badge or code information for location entrance(s).
  - Show how to access time sheets and submit daily entries.
  - Explain pay periods and how payroll works; electronic pay stubs.
  - Provide a tour of the building and/or facilities; may include a driven tour of the local area and facilities; CO’s, towers/huts, landmarks, plant facilities, warehouses, etc., depending on position.
  - Inform that the direct manager will be taking over after the tour, to continue with their departmental training.
  - Explain that they will be receiving via email, a “New Employee Survey” for HR purposes and a “Get to Know You” questionnaire for our internal newsletter-kindly fill them out ASAP.
  - Send a “Welcome to our New Employee” email to all the employees.

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# THE FIRST WEEK

*The first week of onboarding deepens their understanding of the company, their job and teammates.*

**First Week:**

- In the first week, HR to work with department manager on facilitating training on/for:
  - CPNI/RED FLAG
  - Cyber Security
  - Broadband Labels
  - Plant Safety
- Discuss having new employee join team meetings throughout the company; to introduce them in person and allows them time to absorb the culture.
- Discuss having the new employee travel to territory locations within the first 90 days. Suggest having another team member go, or manager.
- Schedule the new employee for a meeting with the CEO/General Manager.
- Verify that the mentor has touched base with the new employee by the end of that first week.
- Job-Specific Training; this would be tailored to the new hire’s specific role, per department.
- Department Manager works to facilitate job specific training; tailored to their role in the company.
  - Introduction to all the tools, systems, software, applications, lingo, procedures, etc.

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## THE FIRST 30-60-90

Within the first 90 days of employment, schedule shadowing opportunities between departments within your organization.

### NEW CUSTOMER SERVICE REP SHADOWS:

- \*Fellow CSR
- \*Accounting/AR
- \*Marketing/Sales Associate
- \*Field Technician/Installer
- \*Switch/Plant or Central Office

### NEW FIELD TECHNICIAN/INSTALLER SHADOWS:

- \*Fellow Field Tech/Installer
- \*Customer Service
- \*Accounting/AR
- \*Marketing/Sales Associate
- \*Switch/Plant or Central Office

- Gain insight through observation
- Creates an understanding of processes
- Learn other responsibilities and skills
- Creates ENGAGEMENT

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## To Ensure Success... To Keep Them Engaged...

### Create a structured training process within each department



- Define the expectations
- Promote a welcoming atmosphere
- Provide manager check-ins
- Support & communicate
- Confirm training is advancing
- Celebrate achievements
- Encourage job shadowing
- Follow the 30-60-90 plan

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# ASSIGN A MENTOR

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## The MENTOR

**Definition: An experienced and trusted advisor.**

- Provide support
- Helps to develop problem solving skills
- Helps to develop leadership skills
- Are a source of knowledge
- Can help set goals
- Listen
- Provide encouragement
- Constructive feedback
- Trusted ally



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## Expectations of the MENTOR

- \*It's best if the mentor assigned is from a different department.
- \*They should meet with the new hire within the first week and again after 2 weeks if possible; even if just a phone call.
- \*A scheduled meeting should take place at 30, 60 & 90 days. These can usually be 30-60 minutes long.
- \*Reference the list of questions created for the mentoring process. Take notes as needed for reference.
- \*If necessary, contact their manager or HR if there are any questions leaning their direction.
- \*Keep it informal and friendly.

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## And then what?

**At 90 days, the new hire will meet with their mentor to go over 90-day questions.**

**Also at 90 days, a series of markers take place:**

- New employee qualifies for free services if applicable.
- Employee benefits are typically available.
- New employee will meet with our CEO and HR for an informal review.
- Professional photograph will be scheduled, for internal directory and marketing purposes.
- A post onboarding reflection survey will be sent to the new hire.

### REFLECTION SURVEY

Enables us to fine tune our pre and onboarding processes as well as the mentorship program.



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## In conclusion...

The long-lasting effect of a successful onboarding experience for the new hire is loyalty, dedication, engagement and purpose.

## Who wins?

THE EMPLOYEES    THE CUSTOMERS    THE COMPANY

THE COMMUNITIES

**...EVERYBODY!**



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# Thank you

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