ONBOARDING TOOLKIT

New Team Member Toolkit

Contents

Toolkit's Purpose

The purpose of this toolkit is to provide new team members with a "roadmap" for successful and effective onboarding. Butler realizes our new team members are excited about their new role and we want to ensure the onboarding process meets this excitement and sets team members up for success. This toolkit provides many helpful resources, activities, and things to consider aiding team members with acclimating to their new roles as quickly as possible.

Here's what is provided in this toolkit:

- ✓ Purpose of Onboarding
- ✓ Onboarding Goals and Activities (divided into onboarding stages)
    - o Pre-Onboarding
    - o Initial Onboarding
    - o Team-focused Onboarding
    - o Growth, Mentoring, Initial Performance
    - o Ongoing Development
- ✓ Appendices/Examples
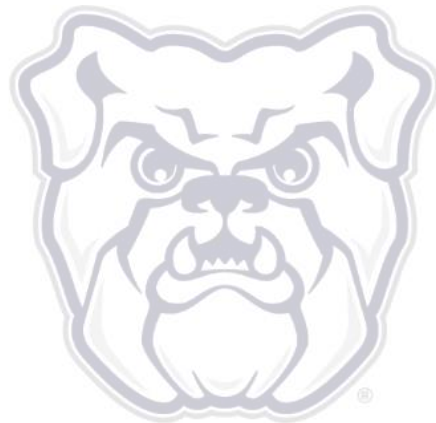
Purpose of Onboarding

Onboarding Benefits

At Butler, we empower our team members to create meaningful and innovative experiences. Onboarding and starting your new position should be no exception to this. Thus, please take time to engage deeply in your onboarding experience. Onboarding matters to your retention and productivity.

- ■ *Team member Retention*: According to SHRM (2017), 69% of team members are more likely to stay with a company for three years if they experienced great onboarding. Additionally, 58% are expected to be with the organization after three years if they had a structured onboarding program. Additionally, The Brandon Hall Group (2015) reports that retention is greater by 70% in productive onboarding programs compared to ineffective (or no) onboarding.
- ■ *Productivity:* Additionally, SHRM (2017) reports organizations with an effective onboarding process experience 50% greater productivity from their new hires. The Brandon Hall Group (2015) found this number to be approximately 70% greater.

> **The Bottom Line: Investing in your onboarding experience will influence your future at Butler**

Effective Onboarding: The Four C's

As discussed in the prior section, **effective** onboarding can aid in increasing new team member retention and productivity. But what does **effective** onboarding entail? According to SHRM (2017), **effective** onboarding is comprised of four C's: Compliance, Clarification, Culture, and Connection. New team members can use the guidelines below to improve the onboarding experience.

Compliance	Clarification	Culture	Connection
•Legal issues (FERPA, etc.) •Policy-related issues •Department processes	•Purpose of the position •Position-related duties •Department-related expectations (hours, communication, etc.)	•Butler's mission & vision •Strategic direction •Team values and norms •Department goals and strategies	•Meeting team members & people they will work with regularly. •Learning about collaboration opportunities (groups, etc.) •Subscribing to Butler news & updates

Onboarding Timeline

Another key component of orientation is that it is much more than the first day. Instead, there are many stages of orientation as depicted in the diagram below. This framework will be utilized to inform the activities listed in this Toolkit.
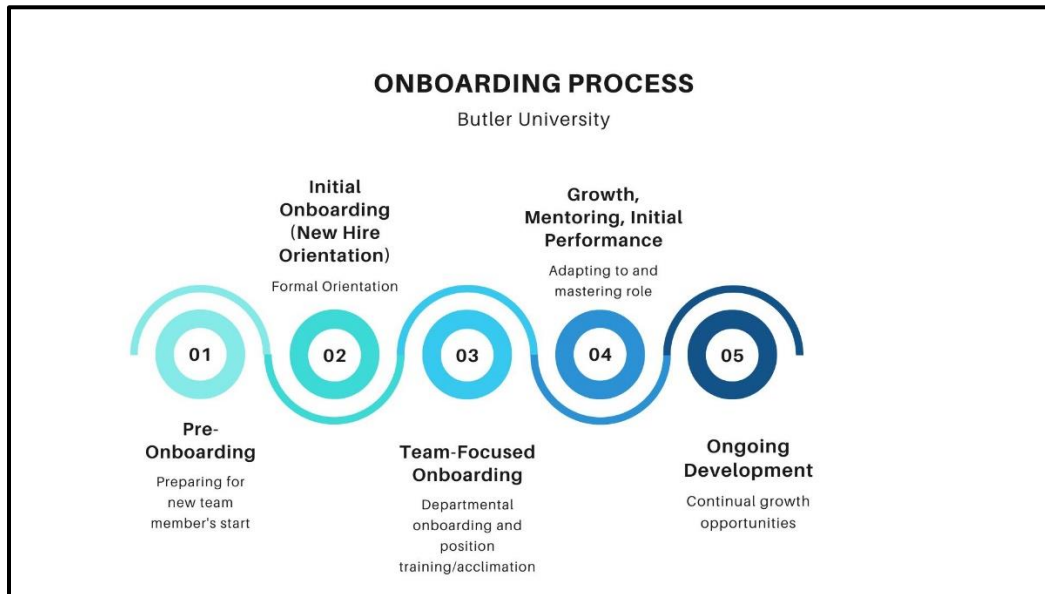
Each of the above stages is defined below. Furthermore, the following sections will provide key activities for leaders related to each of these activities.

Pre-Onboarding	•Takes place before a new team member's start day •Work aligned with preparing for the team member to start
Initial Onboarding	•The team member's first day at Butler •Includes New Team Member Orientation and general "housekeeping activities"
Team-Focused Onboarding	•Typically the first two weeks for a new team member •Includes training for role, meetings with key team members, and overall acclimation
Growth, Mentoring, Initial Performance	•The first 90 working days of an team member's employment •Includes much training and ends with the 90-day review (post introductory period.
Ongoing Development	•Training and growth should never end; instead they are ongoing •Ongoing development includes annual reviews, elected training, and required training

Onboarding Activities and Goals

Pre-Onboarding Activities
Pre-Onboarding refers to activities and planning before the start day. Specifically, new team members need to spend time completing the required paperwork so Butler (or any organization) can effectively enter them into the required systems. Delays in submitting these items could result in missing access to key systems.

- ☐ Complete and submit all new hire paperwork to the Human Resources office before your first day. This information is needed to create a staff ID for you; thus, the sooner you can complete the paperwork, the earlier all of your access will be established.
  - ○ Information regarding this paperwork is sent to all new team members after an employment offer is accepted. If you have additional questions, you can contact Human Resources at askHR@butler.edu. Also, the New Hire Information website has helpful information.
- ☐ Acclimate yourself to Butler's Campus and ensure you know "where to go" on your first day.
- ☐ Review your onboarding agenda and send any questions to your new leader.
  - ○ Your new leader will provide you with an onboarding agenda. Take some time to review this and mentally prepare for your first day. If you have any questions about your role or agenda, please contact your leader directly.
- ☐ Take time for yourself and get excited about your new role.
  - ○ It's important to be your best self—and that begins with self-care. So, please make sure to tend to your well-being before starting your new role. If you need some inspiration, visit the Butler BU|Be Well site.

Pre-Onboarding Goals
The goals of pre-onboarding are simple in concept but are not easy to execute. Specifically, the main goal of pre-onboarding is to ensure new team members are ready for their first day. This includes completing the necessary paperwork, mentally preparing for the first day, and taking some time to recharge before the first day.

Initial Onboarding Activities and Goals

Initial Onboarding Activities

Initial Onboarding refers to the first day "on the job." The goal of the new team member should be to learn as much as possible and obtain the items required to access areas and systems needed. Specifically, time should be spent on the following activities:

- ☐ Attend *New Team Member Orientation*
- ☐ Complete any remaining HR paperwork
  - o Benefits paperwork should be emailed to benefits@butler.edu
  - o Other HR questions should be directed to askHR@butler.edu.
- ☐ Obtain personnel items related to employment
  - o Photo ID (Parking and Transportation Services Office)
  - o Parking Permit (Parking and Transportation Services Office)
  - o Office/Facility Key (Facilities)
    - ▪ Note: keys may not always be available on the first day. If not, work to obtain the key as soon as possible.
  - o Order name badge (Bardach)
  - o Order business cards—if needed (Marketing)
- ☐ Review training agenda and complete first-day activities
- ☐ Take a tour of the office space and surrounding areas
- ☐ Start work area set-up
  - o Work with departmental admin for ordering any additional supplies needed.
- ☐ Start Technology & Profile Set-up (see the Technology and Profile Set-Up Chart)
  - o More than likely, you will not complete all the technology and profile set-up activities on the first day. Please use the chart and work to complete as much as possible during your first week.

Initial Onboarding Goals

The goal of initial onboarding is simple: ensure new team members understand the "basics" of what it means to work at Butler. Much of this information will be garnered during *New Team Member Orientation*. Additionally, during the first day, as a new team member, you should focus on making sure you have the assets, access, and technology to complete the rest of your onboarding. Specifically, goals center around getting IDs, parking permits, and accessing technology.

Team-Focused Onboarding Activities and Goals

Team-Focused Onboarding Activities

Team-Focused Onboarding refers to a team member's first two weeks in their role. During this time, new team members gain training about their new role and connect with team members, helpful resources, and the broader Butler Community. The team member's leader will outline these weeks in the form of an onboarding agenda. The agenda will include time to complete the activities listed here:

- Complete any remaining technology and profile setup (listed in the previous section)
- Ensure all benefit elections are complete and all HR paperwork is submitted.
- Complete mandatory training (team members will receive access from HR) within the first 30 days of employment:
  - *Bridges: Building a Supportive Community*
  - *Diversity and Inclusion in the Modern Workplace*
- Attend onboarding meetings and sessions.
- Connect with the Butler community and resources (i.e., Butler Today, Staff Assembly, etc.).A Groups Resource Document is available to support this activity.
- Complete the trainings associated with your role.
- Visit with new team members and learn about how your role works with theirs.
  - Sample questions to aid in these conversations are provided in the appendices.
- Learn about your leader's expectations and workstyle preferences. Share your needs with your leader. These communications will aid in an authentic and meaningful relationship.
  - Sample questions to aid in this conversation are provided in the appendices.
- Discover more about Butler University and connect with Butler in meaningful ways (see the Getting to Know Butler University table)
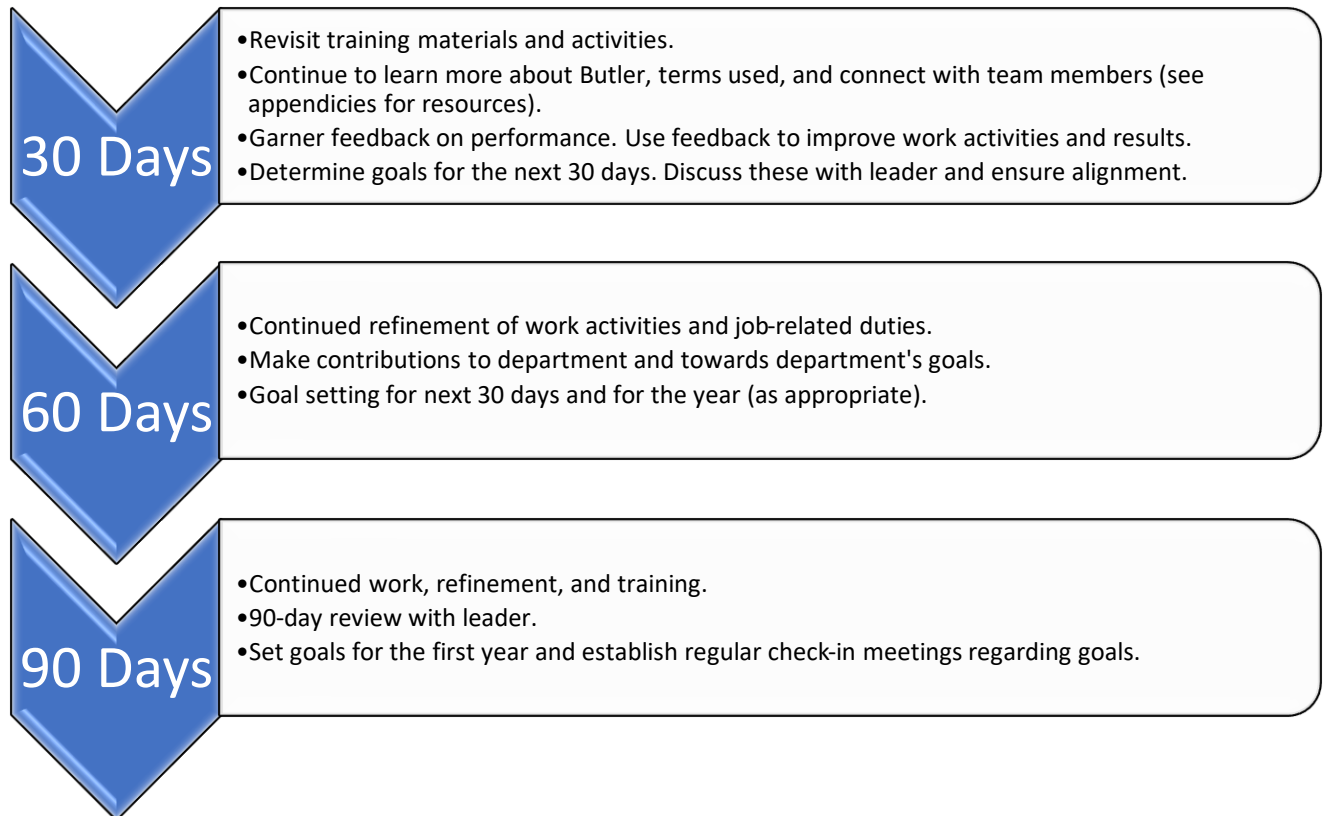
Team-Focused Onboarding Goals

The primary goal of team-focused onboarding is to acclimate new team members to their position, their team members' positions, and the positions in related departments/teams. Thus, it should be a goal for team members to connect with as many people as possible during this onboarding stage. In addition to connecting with others and starting to forge relationships, new team members should start learning their roles during the team-focused onboarding stage. New team members should leave this phase with the confidence of "what to do" and "who to work with" in their position. Furthermore, new team members should have a greater understanding of who Butler is and how to become a part of the greater community.

Growth, Mentoring, and Initial Performance Activities and Goals

Growth, Mentoring, and Initial Performance Activities

The *Growth, Mentoring, and Initial Performance* stage refers to the new team member's first 90 working days. During this time, new team members should focus on learning their roles and getting feedback from their leader. Specifically, a new team member should start "producing" during this time and gain coaching and feedback from their leader and team members. This feedback will help the new team member refine their activities and continually improve their work. This onboarding stage will culminate with a 90-day review and creating goals for the remainder of the year.

30 Days
- Revisit training materials and activities.
- Continue to learn more about Butler, terms used, and connect with team members (see appendicies for resources).
- Garner feedback on performance. Use feedback to improve work activities and results.
- Determine goals for the next 30 days. Discuss these with leader and ensure alignment.

60 Days
- Continued refinement of work activities and job-related duties.
- Make contributions to department and towards department's goals.
- Goal setting for next 30 days and for the year (as appropriate).

90 Days
- Continued work, refinement, and training.
- 90-day review with leader.
- Set goals for the first year and establish regular check-in meetings regarding goals.

Growth, Mentoring, and Initial Onboarding Performance Goals

The primary goal for the growth, mentoring, and initial performance onboarding phase for the new team member to gain confidence in their role and meet overall performance expectations. Ideally, the new team member would be "fully functioning" in their role by end of this phase and feeling confident to take on new activities and contribute in ways above their current role expectations. To accomplish this, the new team member needs to continue to be open to learning and coaching.

Ongoing Development Activities and Goals

It will take time for new team members to not "feel new," and this is to be expected. Having said that, after a new team member passes the first 90-day mark, the onboarding will progress to more ongoing development activities. Specifically, team members will be part of the ongoing growth activities to advance their development.

- o ***Receiving Feedback and Goal-Setting:*** Team members will work with their leaders in two main ways, see below, to set goals and receive feedback. Both formal and ongoing feedback are designed to aid individuals with growth and development.
    - o *Formal:* Formal feedback is provided at Butler on an annual basis as part of the performance review cycle. During this time, team members and leaders will evaluate performance based on goals from the previous year and set goals for the upcoming year.
    - o *Ongoing:* A team member and leader should consistently meet to discuss performance. Specifically, team members need to know what they are doing well and where they can improve. Butler leaders will provide this feedback to their team members; however, team members should never feel like they need to wait for feedback. Instead, asking for feedback or coaching when desired is something team members should do.
- o ***Team and Community Building:*** As seen in this toolkit, there are countless ways for team members to engage with the Butler community. Team members are encouraged to join groups, attend events, and participate in activities at Butler.
- o ***On-going Training:*** Training is ongoing. It is a team member's responsibility to find ways to continually help themselves develop. This can be accomplished through department-based training, role-based training, professional development sessions, attending conferences, cross-functional training, or by serving on committees/groups.

Appendices
Technology & Profile Set-Up

The chart below provides you with a map to getting your technology and digital profile set up. If you have questions related to technology, please visit the Ask Site.

Activity	Comments	Status
Review Quick Start to Technology Information		
Set Up Two-Factor Authentication		
Set Up RingCentral (Butler Phone)		
Confirm Printer Access	Work with department on which printers are needed.	
Confirm Room Scheduling Ability	Work with team to identify rooms and schedule through EMS or Outlook.	
Create Email Signature		
Identify systems needed for role and confirm access to these systems.	Work with the department to identify systems and confirm access. If access is missing a case will need to be submitted to IT.	
Microsoft Teams Training	If needed, this training helps with understanding Microsoft Teams.	
Microsoft OneDrive Training (if needed)	If needed, this training helps with understanding OneDrive.	
Sign-up for Dawg Alerts		
Update directory profile		
Review and update demographic information through self-service at my.butler.edu		

Questions for Team Members

When you meet with team members, they will come to the meeting prepared to share with you information about their roles. However, it is good to be prepared to ask them questions as well. The questions below are some questions new team members can ask others during introductory meetings. Please note that these questions are not required. Instead, they are provided as guidance to be used as desired (or not).

- ☐ Tell me about your role.
- ☐ How will I, in my new position, work with you?
- ☐ As we work together, what are the most important things for me to know?
- ☐ How can I be a good partner to you?
- ☐ How can we partner best together?
- ☐ What are some things that I should know about my role/Butler/department/processes/etc. that I probably haven't thought to ask about?
- ☐ What do you like best about your position?
- ☐ What is the most challenging?

Questions for Leader

The purpose of this meeting is to better understand who your new leader is and the best way to work with them. Some questions that could be used to aid in this conversation are:

- ☐ What's the most important thing I should know about my new role?
- ☐ Who will I be working most with? What's most important about these relationships?
- ☐ What's the best way to ask for your input and feedback?
- ☐ How do you prefer to communicate? Or what is the best way for me to communicate with you?
- ☐ What can I do to best support you/team/organization?
- ☐ What's the best way I can add value or be helpful immediately?
- ☐ Is there anything I should avoid doing that frustrates you or the team?

Additionally, it's important to share with your new leader who you are and what motivates you. Some things to consider sharing:

- ☐ Your strengths.
- ☐ Your work style and/or approach.
- ☐ What excites you about the role.
- ☐ What intimidates you—or where do you think you may need the most help.
- ☐ Any past leadership experiences (good or bad) that have influenced you.
  - o For example, if you had a toxic leader who has impacted your confidence, this could be something valuable to share.
  - o Or if you have had a positive experience with a leader—sharing that experience would be helpful to your new leader.
- ☐ What you value most and appreciate most in team members and the work you do?

Getting to Know Butler University

The Table below provides information related to Butler overall. Take some time to visit these sites or take a tour to learn more about the Butler community, strategy, and campus.

Item	Comments/Notes
Attend Campuswide Events: ☐ State of the University ☐ Back to School Picnic ☐ Year End Celebration	Butler has many events that faculty and staff are encouraged to attend to learn about Butler's goals, celebrations, and upcoming activities.
Butler Magazine	It may be helpful to review the past few issues to learn about Butler's priorities.
Butler Orientation	Learn about Butler from a New Student lens by reviewing orientation.
Butler Academics ☐ Academic Calendar ☐ Six Colleges ☐ Division of Professional Studies	
Butler Leadership & Strategic Direction ☐ President Danko ☐ President's Cabinet ☐ Board of Trustees ☐ Strategic Direction	Visit these sites to learn more about the people and strategies leading Butler.
Campus Tour	Our Admissions team offers student-led admissions tours. Butler faculty and staff are welcome to join them by contacting the admissions office and confirming a tour time and availability. Tours are a wonderful way to learn about Butler's campus and all it has to offer.
On-Campus Dining Options	In addition to this website, you can download the Boost app to order ahead and skip the lines.
Participate in Butler Events or Productions ☐ Homecoming ☐ Day of Giving ☐ Bulldog Crawl ☐ Bulldog Jog ☐ Shows at Clowes Hall ☐ Holcomb Observatory	Butler's campus hosts many exciting events and productions. Butler team members are encouraged to explore the campus and participate in exciting events.
Facebook Sites ☐ Butler University ☐ Butler University Alumni	In addition to these university sites, most colleges, divisions, and departments also have their own accounts. Make sure to search for any of interest to you!
Twitter ☐ Butler University ☐ Butler Athletics	
Instagram ☐ Butler University	
YouTube ☐ Butler University	
Linked In ☐ Butler University	

Common Acronyms and Abbreviations

Like most industries and organizations, Butler and higher education have numerous acronyms used frequently. To aid new team members with these terms, the table below has been constructed.

Acronym/ Abbreviation	Meaning
AACSB	Association to Advance Collegiate Schools of Business (accreditation for business programs)
ACPE	Accreditation Council for Pharmacy Education (accreditation for pharmacy program)
ARCEPA	Accreditation Review Commission on Education for the Physician Assistant (accreditation for PA program)
AU	Atherton Union
BAC	Butler Arts & Events Center
BIRS	Butler Institute for Research and Scholarship
BOT	Board of Trustees
BOV	Board of Visitors
BUPD	Butler University Police Department
BUSF	Butler University Student Foundation
CAEP	Council for the Accreditation of Educator Preparation (accreditation for some COE programs)
CaPS	Career and Professional Success Office
CAT	Center for Academic Technology
CCOM	College of Communication
CFR	Corporate and Foundation Relations
COE	College of Education
COPHS	College of Pharmacy & Health Sciences
CSSE	Computer Science and Software Engineering
CTS	Christian Theological Seminary
CUES	Center for Urban Ecology & Sustainability
DAB	Dean's Advisory Board
DAC	Dean's Advisory Council
DEI	Diversity, Equity, and Inclusion
DH	Dugan Hall
DPS	Division of Professional Studies
EMS	Event Management System
EPPSP	Experiential Program for Preparing School Principals
FAFSA	Free Application for Federal Student Aid
FB	Fairbanks Building
FERPA	Family Educational Rights and Privacy Act
FTUG	Full-time undergraduate student
GH	Gallahue Hall
HB	Holcomb Building
HLC	Higher Learning Commission (University Accreditation)

HRC	Health & Recreation Center
ICAEI	Indianapolis Center for Arts Education & Innovation
IL	Irwin Library
IRB	Institutional Review Board
JCA	Jordan College of the Arts
JH	Jordan Hall
LAS	Liberal Arts & Sciences
LFH	Levinson Family Hall
LH	Lilly Hall
LMS	Learning Management System
LSB	Lacy School of Business
MBB	Men's Basketball
NASD	National Association of Schools of Dance (accreditation for Department of Dance)
NASM	National Association of Schools of Music (accreditation for the School of Music)
NAST	National Association of Schools of Theatre (accreditation for the Department of Theater)
OPM	Online Program Manager
PAC	Provost's Advisory Council
PB	Pharmacy and Health Sciences Building
PSI	Program Success and Innovation
SDS	Student Disability Services
SGA	Student Government Association
SIL	Student Involvement and Leadership
SIS	Student Information System
SLT	Senior Leadership Team