



Onboarding Guide for Oregon State Government

Provided by DAS – Chief Human Resources Office

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OVERVIEW

Oregon state government hires hundreds of new employees to work in a variety of different agencies providing critical services to the people of Oregon.

Many organizations, including state government, tend to focus on a new employee's first day and week. This is when the new employee typically completes forms, completes required training, and attends some type of orientation. This is a "transactional" approach to bringing on new employees and is an orientation.

Orientation is a structured event that focuses on the information the new employee needs to know to get started, such as an introduction to the organization's structure, policies, and procedures. It is one piece of the onboarding process. Onboarding, however, can last anywhere from three months to a year, depending on the responsibilities of the position and the amount of organizational understanding necessary to be successful in the role. The goal is to align new employees with the agency's culture, mission, and values, and focuses on strengthening the employee's connection to the agency and its people. It provides a more strategic plan for employee success than orientation alone.

To distinguish between orientation and onboarding consider:

- Orientation as an event.
- Onboarding as a process.

Many agencies have the 'nuts and bolts' of an onboarding process in place, meaning the information is already available. But beyond the what, it is just as important to consider how to share this information, when to schedule the different elements, and who needs to be involved to make for an engaging onboarding process.

ONBOARDING GUIDE

Oregon State Government

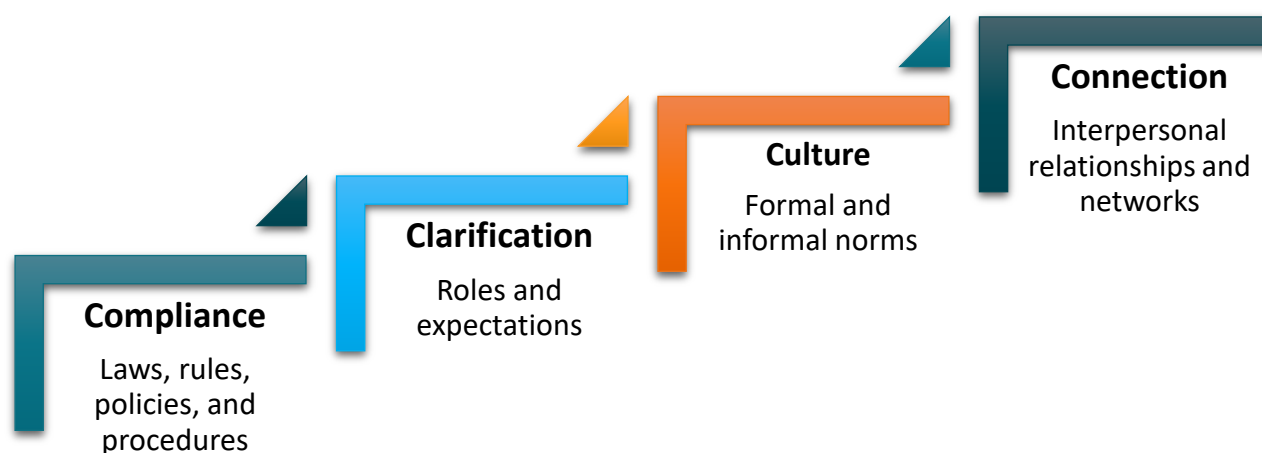
To advance Oregon state government as a place where you come for a job, stay for a career, and make a difference for a lifetime, the Chief Human Resources Office has adopted the employee lifecycle as a strategic, guiding framework for assessing the candidate and employee experience. The employee lifecycle is a model used to visualize how employees interact with their organization. This evolving and cyclical relationship includes the following specific phases: attraction, recruitment, onboarding, development, retention, and transition.



Onboarding is the third of six stages of an employee lifecycle. Each of these stages must be carefully planned and executed to optimize an employee's performance throughout their career. Once talent has been recruited and hired, onboarding serves as a critical step to ensure new employees connect with and effectively contribute to the mission of the agency as quickly as possible. Lack of strategic focus or planning during the onboarding phase can be a barrier to success for the employee's remaining tenure.

THE FOUR C'S OF ONBOARDING

Onboarding is a critical process for engaging new hires. First impressions count, and no employee wants to arrive the first day with a pile of paperwork to complete without the necessary tools or equipment. The best onboarding programs enable new hires to begin contributing quickly; they reduce employee turnover and increase retention. According to Dr. Talya Bauer from the SHRM Foundation, successful onboarding involves proactively covering the four C's of onboarding.



- **Compliance** is the baseline understanding of the applicable laws, rules, policies, and procedures as well as filling out all necessary paperwork. This is the lowest level of an employee's integration into your agency and is typically covered during a formal orientation. Some topics to consider include HR policies, IT policies, safety, public records, harassment prevention, agency procedures, etc.
- **Clarification** ensures the new employee understands their role, responsibilities, and performance expectations. Where does their position fall in the organizational structure? How does their role fit into the organization and how do they contribute to achieving their team's goals? What are their individual goals? What does your agency do and how does it operate?
- **Culture** explains the norms of the agency. You should immerse new employees into your agency's culture throughout the onboarding program. Make sure they are familiar with your agency's mission, vision, and values; history; the way employees communicate with each other; and how they fit within and impact the larger organization.

- **Connection** is the highest level, wherein a new employee develops relationships with the other members of the agency and begins to feel like part of the team. Introduce them to as many of their co-workers as possible. Encourage team members to explain what they do and to include the new hire in formal, as well as informal activities. It helps to assign a mentor or buddy who can be readily available to answer any questions and who can bridge the gap between the new employee and their co-workers.

The enterprise onboarding model incorporates the Four C's within the processes and activities described in the next few sections of this guide.

STRATEGIC ONBOARDING MODEL

The [Partnership for Public Service](#) released a report, “Getting On Board: A Model for Integrating and Engaging New Employees,” about the onboarding practices across the federal government and developed a strategic onboarding model for federal agencies. Oregon state government is adapting the model for its enterprise onboarding program.

The strategic onboarding model outlined below lays out the key aspects of a comprehensive onboarding program, which apply to any agency and any employee in the agency. While this model is comprehensive, agencies should customize it to meet their specific employee needs. The model can be customized for specific groups of employees (e.g., senior leaders or mission-critical occupational groups) or for specific employee needs (e.g., new manager, new-to-government employees).

The strategic onboarding model consists of four key components:

- **Principles:** The four key principles provide strategic direction and alignment for the entire onboarding process.
- **Roles:** These roles include process owners who own and integrate the onboarding process, process champions who directly interact with new employees and support their integration into the agency, and the new employee—because they are responsible to actively participate in all the activities.
- **Process Phases and Key Activities:** The onboarding process begins when a new employee receives their offer of employment and can go up to their first year of employment. The key activities are the specific actions performed in each process step and may be performed by any of the process owners.
- **Outcomes:** Successfully integrating the principles, roles, processes, and activities leads to several desired outcomes, as well as the opportunity to rigorously assess new employees. These measurable outcomes highlight the impact or return on investment of having an aligned and integrated onboarding process.

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Oregon State Government

PRINCIPLES

Align to mission and vision **Connect** to culture, strategic goals and priorities **Integrate** across process owners **Apply** to all employees



ROLES

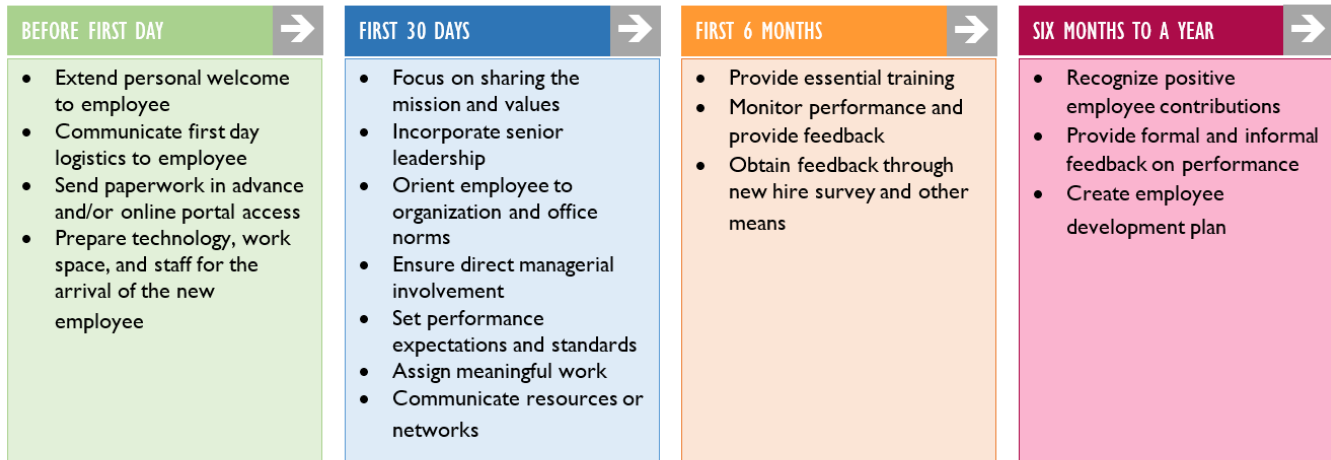
+PROCESS OWNERS

+PROCESS CHAMPIONS

+EMPLOYEE



PROCESS PHASES AND KEY ACTIVITIES



OUTCOMES

High employee **job satisfaction level** **Retention** of high-performing employees Continued **employee engagement** and commitment Faster time-to-**productivity**

ONBOARDING COMPONENTS

This section of the onboarding guide delves into more details of the model components. Agencies that take the enterprise onboarding model and develop an agency-specific onboarding program will find it especially helpful.

The model components convey the basics of onboarding. Once an agency has developed their program, they can move on to tailor their onboarding to specific employee groups, if desired. Tailoring the onboarding program and content to the needs of different types of employees, such as executives, mid-level managers, professional level employees, new to state government and transfers, can enhance the onboarding experience by focusing on what is important for these groups.

This section also provides tools, templates and resources agencies can use to build their program.

PRINCIPLES OF ONBOARDING

The principles align with the third “C” (Culture) of SHRM’s Four C’s framework for successful onboarding. This is a critical area that must be integrated into every onboarding activity the agency does. These principles ensure the onboarding process is comprehensive, integrated and reflective of the agency’s needs.

1. **Align to Mission and Values:** To help new employees feel connected to the agency, onboarding programs must present, explain, and allow new employees to understand how their positions contribute to the agency’s mission and vision. It is not enough to assume an employee can make this connection on their own. Learning about and internalizing an agency’s mission must be a key part of an onboarding program.
2. **Connect to Culture, Strategic Goals and Priorities:** The onboarding program must accurately reflect the mission and culture of the agency. It should paint a realistic picture of the agency’s culture, so employees experience consistent messages once they transition to their roles. The program must also align with other priorities. Onboarding goals should be built around these priorities.

- 3. Integrate Among Process Owners:** An effective and efficient onboarding process should identify and integrate all process owners. Human resources will play a key role within the process, but the agency must identify the process owners for coordinating the activities involved with security, IT, payroll, PEBB, facilities, etc.
- 4. Apply to All Employees:** The most successful onboarding programs cover the basics for all employees, regardless of location and level, and are also tailored to specific types of employees. Onboarding should consider the needs of new employees by understanding what employees need and want out of the onboarding experience, in addition to meeting requirements for mandatory activities. New employees can be brand new entrants to the workforce or come from other state organizations with different cultures and norms. In the latter case, these employees need onboarding too, because how they conducted work in their old organizations may or may not apply to their new organization.

ROLES

Identifying and assigning roles and responsibilities for onboarding are just as critical as having a robust, comprehensive process. While many onboarding activities are routinely performed within each responsible office, few organizations view these activities as part of a coordinated process. There are three types of roles inherent in the onboarding process: process owners, process champions, and the new employee. Each role depends on the other to ensure a successful onboarding process. Roles must be clearly defined and communicated for the agency to achieve its desired onboarding outcomes.

Process Owners

Process owners must take accountability for executing the mechanical aspects of onboarding while coordinating with others. The level of engagement of process owners tends to be extremely high initially, as a new employee joins the agency, and subsequent involvement tapers as the employee settles in. Unfortunately, when multiple people own a process, a common problem is that no one really “owns” it. That is why the responsibilities of process owners must be clearly defined and coordinated.

The two key process owners are human resources, and someone designated within the division, section, or work unit of the new employee.

Human resources owns the conceptualizing, planning, and coordinating of the onboarding experience. The specific functions of human resources include:

- Setting goals and developing the onboarding program.
- Processing new employee paperwork.
- Developing and overseeing agency orientations.
- Developing and overseeing training.
- Integrating all aspects of onboarding to ensure the process is streamlined and effective.
- Measuring the impact of onboarding.

The designee within the division, section, or work unit is responsible for coordinating all necessary activities to ensure the employee has all the information, resources, and physical logistics (whether at-work or at a remote site) for them to begin working. This includes coordinating with HR, IT, payroll, benefits, facilities, etc.

Process Champions

Process champions are primarily responsible for motivating new employees and helping them understand how their positions are critical to the fulfillment of the agency's mission. Process champions facilitate onboarding through targeted interaction or communication with the new employee. Common categories of process champions include the following roles.

Senior Leadership

New employees want to meet and hear from senior leadership in their first days, weeks, and months. Senior leadership involvement sends a clear message that the agency is invested in the new employee. Senior leaders can support the onboarding process by finding ways to communicate and reinforce the mission and values of the agency by speaking at the orientation session, stopping by new employees' desks, or sending signed welcome letters. The frequency of involvement and how it is achieved will vary based on factors such as agency size and organizational structure.

Managers and Supervisors

The manager's importance in onboarding cannot be overstated, yet their role is often left to their own discretion and is not given the same level of standardization and support as other onboarding elements. Having said that, developing and providing tools for managers can help educate managers about the importance of their roles, enhance their onboarding capabilities, and encourage desired behaviors. All managers should:

- Welcome new employees.
- Meet with new employees as soon as possible after orientation activities are completed.
- Communicate job responsibilities and expectations.
- Explain and set cultural expectations (e.g., when to “cc” the manager on e-mails, what decisions can be made without manager approval, communication styles).
- Review the agency’s performance management system and process with the new employee and develop an individual development plan that sets performance expectations during trial service.
- Assign meaningful work.
- Discuss career development.
- Monitor performance and routinely provide formal and informal feedback (e.g., weekly, or monthly depending on the position and the employee’s needs) throughout the employee’s first year.

Buddy or Mentor

New employees should be assigned a “buddy” or “mentor” who can help integrate them into the agency and help them understand the organizational culture. They are generally peers who are matched with new employees to help them:

- Understand the written and unwritten elements of the organizational culture.
- Learn how to navigate the agency.
- Meet colleagues and other essential staff.
- Answer any questions.
- Identify useful new employee resources (e.g., intranet sites, points of contact, information).

New Employees

New employees are responsible for being active participants in their own onboarding. Onboarding works best when it is a two-way process. The agency provides information, resources, and equipment; the new employee is engaged and ready to embrace new ways of doing work and adapt to new office norms and work styles. New employees must also complete all required paperwork and take mandatory training, as well as work proactively to develop relationships and seek the resources and information they need to do their jobs.

ONBOARDING PROCESS PHASES AND ACTIVITIES

An employee's needs for onboarding do not end in the first days or weeks of employment. Thus, the onboarding process can consist of several phases, beginning when the employee accepts the job offer and continuing through their first year of employment. Depending on the responsibilities of the position and the amount of organizational understanding necessary to be successful in the role, a new employee may not need to go through all these phases. The rest of this section covers four phases identifying the recommended activities that should be completed.

1. Before the First Day.
2. First 30 Days.
3. First 6 Months.
4. Six Months to a Year.

Phase 1 Activities – Before the First Day

This first phase of the onboarding process is the time after the employee accepts the job and before their first day of employment. During this time, the division, section, or work unit process owner should start coordinating all activities with HR, IT, payroll, etc. The new employee may be filling out paperwork, learning about their benefits, or otherwise preparing for the first day in the new job.

Agencies can complete the following activities before a new employee's first day:

1. Complete all forms and paperwork.
 - Criminal Records Check: All new hires need a criminal records check.
 - Fingerprints and CJIS: Fingerprints and CJIS clearance may be required for certain positions.
 - I-9 Form: Any new hires who are new to state government must complete their I-9 form in Workday.
2. Send a welcome packet. If your agency has everything available electronically then you can send the new employee, the welcome packet via email. Consider including the following items:
 - Welcome letter.
 - Information on when and where to report on the first day (i.e., where to park, how to access the building, who to call when in the building, etc.).
 - Position description.

- Parking/transportation information.
 - Agency information.
 - Building logistics, if applicable (i.e., restrooms, break rooms, conference rooms, printer locations, etc.).
 - Map of the area.
 - Links to applicable statewide and agency policies, collective bargaining agreements, etc.
 - Links to PEBB and PERS information if they are new to state government.
3. Send an email to the work group the new employee will be working with letting them know when the new employee will start, their position, a brief bio, etc.
4. Set up the new employee's workspace before the first day:
- The manager should ask the employee if they need any accommodations.
 - If working in the office, set up their work area with the needed equipment and supplies.
 - If working remotely, gather the necessary equipment and supplies and schedule a time for the employee to pick up the items.
 - Set up their computer logon and arrange for access to common drives, calendars, web conferencing tool, Workday, etc.
 - Order office or work area keys or schedule a time to get their identification card on the first day.
 - Order mobile phone (if applicable).
 - Order business cards and a name plate (if needed).
 - Arrange for parking on the first day (if needed).
 - Add the employee to relevant email lists.
 - Add the employee to regularly scheduled meetings.
 - Order/select a welcome gift for first day (optional).
5. Schedule the following meetings with key people during the new employee's first week. The manager will need to give the process owner this information and the process owner will schedule the meetings.
- Meeting with their direct manager (this should be on the first day).
 - Meeting with someone to give the new employee a tour of the building (if they aren't working remotely).
 - Meeting with HR, if needed, to complete new employee paperwork.

- Meetings with people with whom the employee will work with regularly.
- Meetings with appropriate stakeholders or customers.
- New employee orientation.
- Team lunches (optional).
- Engagement with other management teams or executive leadership, if appropriate.
- Schedule any of your new to Oregon state government employee into the Uplift Your Benefits training.

Phase 2 Activities – First 30 Days

The second phase refers to the first day the employee starts work and any activities needed within the new employee's first 30 days. Since this phase may be the first substantive encounter the new employee has with their agency, it is a critical part of the overall onboarding process and sets the tone of the employee's first impression. Make the first 30 days a compelling and valuable experience.

Consider the following activities in the first 30 days.

1. Have the employee complete all the necessary paperwork, including benefit and payroll forms; review applicable statewide and agency policies; and complete the statewide and agency-specific required training.
2. For employees working in the office, provide them time to get settled and acquainted with the new space and provide a building tour.
3. Review general administrative procedures, including:
 - Office/desk/workstation.
 - Mail (incoming and outgoing).
 - Office supply requests.
 - Reserving conference rooms and state vehicles (if needed).
 - Shared inbox management (if applicable).
 - Disposing of trash (if applicable).
 - Computer support.
 - Use of technology and the tools available.
 - Workday, SharePoint, etc.

4. Provide an overview of the following:
 - Oregon state government and how the agency fits into the structure.
 - Structure of the agency, division, and their work unit and key contacts.
 - The enterprise values and competencies.
 - The agency's strategic plan, mission, vision, and values.

5. Review information about the position and set expectations. Talk about and document the following items:
 - Describe the new employee's initial job assignments.
 - Create a development plan including any formal, informal, or on-the-job training.
 - Establish their regular work schedule, how to report their time and any leave usage.
 - Establish expectations for frequency of communication between the manager and the employee and the preferred method(s) to use, i.e., in-person, phone, video conference, email, messenger, etc.
 - Identify how important teamwork is to their job function. If the employee needs to have regular collaboration to get their job done, think through and establish standards for what this collaboration should look like.
 - Review any information security requirements beyond what's found in statewide and agency-specific policies.
 - Establish frequency of check-ins.
 - Follow up on required training and policy/procedure reviews.
 - Review the position description, performance expectations and standards.
 - Review trial service parameters, expectations, and standards.

6. Introduce the new employee to their new team, key staff, and committee members (i.e., front desk/lobby staff, support staff, wellness/safety committee members, DE&I members). To integrate the new employee into their team, consider doing the following:
 - Have all the team members complete the Gallup Strengths Finders® (fee-based) or the Work Styles Inventory (free) and do a team building exercise with the team.
 - Create a team, division, or agency welcome video.
 - Have each person create their own Pecha Kucha presentation and then share it at a team meeting.

- Create a welcoming book. Ask current employees to write about themselves in the book and include pictures.
- Create a new employee discussion group. Establish a schedule for all new employees to get together with a facilitator to discuss their experiences, identify successes, describe moments of pride, ask questions, etc.
- Plan a welcome event. Put together a welcoming breakfast or lunch. Consider doing something at a staff meeting when employees regularly gather. Make it fun.
- Create a new employee get-to-know-you questionnaire. Ask new employees to profile themselves. Use unintimidating questions, such as:
 - What is your hidden talent?
 - Who is your most admired person and why?
 - What do you like to do in your spare time?
 - What's one thing you would really like other people to know about you?
 - Create a "favorites list" and have all employees complete it, such as what's your favorite snack, restaurant, hobby, actor, sport, store, music, color, dream job, dream vacation, etc.

Phase 3 Activities – First Six Months

The third phase, "first six months," refers to the time between the new employee's first month and the first six months of employment. During this time, the new employee should begin to acquire a full workload while the manager monitors performance and provides regular feedback. Like the first day, this period is critical to forming new employee perceptions about the agency and job. A lack of focus on this phase can have negative consequences if employees do not feel integrated by the end of their first six months.

During this period, the primary focus of the manager is checking in with the new employee and providing regular feedback. Here are the recommended activities for this phase.

Benefits

Provide information on the benefits that become available at six months, including leave availability (vacation and personal business), PERS eligibility, etc.

Trial Service

Trial service generally occurs upon initial appointment to state service, transfer from another state agency, and upon promotion or demotion. Trial service is typically six or 12 months. The length of trial service depends upon the complexity of the job and the length of time required to effectively perform the work.

Trial service is the final phase of the hiring process to afford an employee the opportunity to demonstrate the ability to perform the work and provide the manager the opportunity to confirm qualifications and fit for the position. Employees need positive and corrective feedback at frequent intervals, especially during the trial service period. When performance is poor, it is important to remind an employee of your performance expectations and go over potential outcomes if their performance does not improve (with removal from trial service being a possibility). It is important to check the applicable CBA and relevant policies for trial service language. Ideally, a supervisor meets with a new employee monthly to review the employee's progress.

Once the employee completes trial service, make sure to celebrate this important milestone.

Check-ins

As important as setting performance expectations is, there is perhaps nothing more important than checking in with your new employee on a frequent and regular basis. Considering the nature of the work they are expected to perform, and the nature of the employee themselves, you will want to identify an appropriate check-in schedule. So now that you have identified strategies for checking in with your new employee, what should you plan to talk about? Perhaps the best way to check-in with your new employee is through questions. Here are some suggested check-in conversation starters.

Core Job Responsibilities

- Have you faced any challenges in performing your job functions?
- Do you have any questions about the expectations I have of you?
- What are you working on right now?
- What have you most recently accomplished?
- Is there anything I can do to facilitate your work?
- What do you like most about your responsibilities? What do you like least?
- May I share with you a couple of observations I've made?

Working Effectively as a Team Member

- Who have you most regularly collaborated with? In what ways?
- Which technologies do you most frequently use in your interactions with teammates? Are they adequate?
- Have you had any challenges in working with other members of our team?
- Is there anything I can do to help you build better relationships?
- May I share with you a couple of observations I've made?

Statewide and Agency Policies and Work Standards

- Do you have any questions about the requirements of the policies and standards?
- Are you currently experiencing any challenges in meeting the requirements specified in your performance expectations?
- May I share some "best practices" for effective remote working that we've discovered?
- Here are a couple of observations I've made.

Working Effectively with Your Manager

- Is there anything you want to make me aware of that I may not know about yet?
- How do you feel about our check-in schedule? Would you like to talk more frequently, less frequently, or is it just about right?
- How best do you receive feedback?
- Here are a couple of observations I've made.

Professional Development

- How are you doing on your professional development goals?
- What are you doing right now to develop professionally? What's next?
- How can I assist you in accomplishing your goals?
- Here is some feedback I have in relation to your career development.

Completing Projects in a Timely Manner

- Let's review your project status report.
- What are you working on right now? What's next up?
- How are you doing on timelines? What is your strategy to get it all done?
- What successes have you had with each project?
- What challenges are you facing with each project?
- What assistance do you need from me or others to complete your projects?
- Here are a couple of observations I've made.

Phase 4 Activities –Six Months to a Year

The last phase, “six months to a year,” refers to the time in between the new employee’s first six months and the end of the first year of employment. For most agencies, formal activities related to onboarding do not extend into this period. But for the employee, the feeling of newness and the accompanying learning curve linger. Continued support during this time can increase an employee’s contribution to an organization’s mission and help speed employees to full productivity.

For some employees, trial service ends at six months, while for others it may be a year-long period. If trial service is one year, you will continue to do the Phase 3 activities related to trial service and check-ins.

At this phase, the employee is fully engaged in the new role and is applying their new skills and knowledge, making sound decisions, contributing to team goals, developing effective working relationships, and understands how their assignments affect others in the organization. They should have a strong understanding of the agency’s mission and culture. The employee should have gained greater confidence in their position and can work with some level of autonomy.

Potential Activities

1. Provide training to build competencies and fill any skill gaps.
2. Provide job shadowing and on-the-job training to help the new employee understand internal systems and operating practices.
3. Once the employee has been with the organization for six months, a new employee survey should be conducted to illicit information on their onboarding experience; any issues that surface in the survey should be addressed.
4. Review and update the performance expectations and standards. During the first six months the focus of the performance expectations and standards were for the employee to learn and develop new skills. After a year, the performance expectations and standards should be reviewed and adjusted to focus on putting the new skills and information to work.

ONBOARDING OUTCOMES

A structured approach to measuring outcomes linked to the onboarding principles, will enable agencies to track operational performance. Positive outcomes include the following:

- Higher employee job satisfaction.
- Increased retention of high-performing employees.
- Continued employee engagement and commitment.
- Faster time-to-productivity.

An additional benefit of more actively engaging a new employee through a structured and long-term onboarding program is the ability to assess the new employee more accurately over the course of their trial service period.

Comprehensive onboarding programs can set high performers on the path to productivity and success more quickly. However, a good onboarding program can also help to identify individuals who are not a good organizational or occupational match. The enhanced focus on employees throughout their first year provides greater opportunity for managers and peers to assess the new employee.

Below are recommended effectiveness measures.

1. **Turnover:** Looking at the agency's turnover is a critical component of measuring the onboarding program. Looking at turnover rates reveals how effectively an agency/division/work unit is retaining its workforce. This includes a detailed look at rates of turnover within certain groups, such as job profiles and race/ethnicity. The turnover profile is one profile that may be drastically different depending on the agency/division/work unit. Thus, it can be especially helpful at quickly pinpointing any strengths or opportunities for improvement. The retention profile can be extremely useful at identifying when in an employee's career they are likely to leave the agency/division/work unit. It is recommended to look at turnover rates as part of the onboarding process at the following intervals:
 - a. **First six months:** The number of individuals leaving your organization within the first six months of starting a position divided by the total number of individuals within your organization during the respective time period.

- b. **First year:** The number of individuals leaving your organization within the first year of starting a position divided by the total number of individuals within your organization during the respective time period.
2. **Onboarding Process Evaluation:** Evaluate the initial onboarding process (the first 30 days).
3. **Onboarding Surveys:** Onboarding surveys should measure factors that are influenced by onboarding, such as commitment to the organization, job satisfaction, feelings of connection, etc. Additionally, this survey can measure specific onboarding activities, such as activities related to employee connection, role clarification, etc. The onboarding surveys should be done at the six-month and one-year mark of an individual starting a position.

In conjunction with an employee lifecycle survey program, onboarding surveys can measure change in important measures over the employee lifecycle, such as likelihood of recommending the organization as a place to work. This longitudinal analysis can pinpoint specific phases and areas where more attention may be warranted.

4. **Time-to-Productivity:** This measures how long an individual takes to be productive. This can be examined by unit and/or job profile to highlight where further onboarding may be helpful. Furthermore, examining change in time-to-productivity from before implementing an onboarding program to after implementing an onboarding program is a concrete and clear indicator of whether an onboarding program is effective.