



## NEW EMPLOYEE ON-BOARDING PROGRAM INVISION PLANNING, ARCHITECTURE, & INTERIORS

Category: Communications

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### ABSTRACT

Several years ago, INVISION created an on-boarding program to address the rapid growth of their firm and provide structure to ensure that new hires were getting the information, training and mentoring they needed to become part of the team.

Implementing this program has helped provide consistency in new-hire training, ensured that new hires are given the resources to hit the ground running, and connected new hires with their colleagues to help them feel welcome and prepared in their new position, while promoting firm culture.

### PERSPECTIVES

While INVISION does not have a dedicated HR group, they have a business manager, and office managers at each office who handle HR policies. Prior to implementing an on-boarding program, INVISION was a firm of 40 people. While new hires received a basic orientation, no formal process or program had been created and there was no tracking of what information, training, or mentoring was being provided for each new hire. As INVISION grew rapidly, this lack of a documented process became more apparent. In order to review various needs sparked by a growing firm, INVISION chose to create a Human Resources committee, to look at several policies and practices of the firm. One of the outcomes of this committee was to create an on-boarding program. While the creation of the program was driven by the need to track new employee needs and training, the program has been developed around aspects that promote mentoring and firm culture.

### PROCESS

The process for developing this program was simple. The committee started by listing the typical items they were already explaining to new hires. This included basic mechanics of their organization, including where to park, timesheets, phone and email set-up, and the review of policies and benefits. They also began listing the typical training that they provided employees for software, file structure, etc. This was a simple exercise of documenting what they had already been doing.

Next, they spent time brainstorming some ideas that they weren't doing, but would like to be doing, such as Partner lunches. The group decided that it made sense for them to divide the tasks among individuals in the office. Basic organization mechanics were assigned to the Business and Office managers, software training was assigned to an individual with expertise in that software, and other tasks were divided among firm leaders as appropriate. Their on-boarding program is spread out over 90 days, which aligns with a 90 day employee review.

The implementation of this program was relatively easy. It was the next logical step for the firm, and with the office manager in charge of overseeing the on-boarding of each employee, there was now an organized process to ensure each new employee was getting the information and introduction to the team that they needed to be successful.

## OUTCOME

While this original program has evolved slightly over the years, there have not been any significant changes. The list of on-boarding tasks is large to include a variety of possible needs, however, as new employees are hired the list is tailored to their experience level and individual needs.

A few things that stand out to the firm as being most successful with their on-boarding program include:

1. The tasks are divided among a few people and assigned based on individuals' strengths and knowledge. Because their on-boarding is a process shared by several people, individually the time commitment is not overwhelming. This also allows new employees to get to know more people in the organization.
2. One of the most unique and valuable things INVISION does as part of their on-boarding program is the Partner Lunch. This allows a new hire to meet a Partner who may not have participated in the hiring process, gives new employees a comfort level for working with the Partners, and increases firm vision and culture 'buy-in'.
3. This program applies to ALL new employees and is tailored to meet individual needs.

INVISION believes that creating their on-boarding program has allowed them to be more welcoming, more organized and ready for new hires, and allows them to prioritize the importance of providing new hires with resources and mentoring to acclimate them and allow them to take charge of their career path, and become a valued member of the firm.

# EXHIBIT A: INVISION ON-BOARDING MATRIX

## Employee Name

WELCOME TO INVISION - YOUR ADVENTURE BEGINS!

ONBOARDING TEAM	Business Mgr	Office Mgr	Team Mbr #1	Team Mbr #2	Mktg Mgr	Graphic Designer	Team Mbr #3	Team Mbr #4	Team Mbr #5	Partners
<b>Project Software</b>										
Project Management Software Training	x									
Timesheets	x									
Expense Sheet	x									
Projects	x									
PTO Location	x									
Project Scheduling							x			
<b>PHONE SYSTEM</b>										
Voice Mail Set-up		x								
Conference Bridge		x								
Direct Phone Number		x								
Software		x								
<b>OUTLOOK - Basics</b>										
Email Groups		x								
Set-up signature line		x								
<b>THE OFFICE</b>										
Parking Ramp		x								
Office Tour		x								
Office Floor Plan		x								
Copier Training		x								
Calendar Activities		x								
Social Media		x								
Biography Questionnaire					x					
Business cards		x								
Announcement in paper					x					
Adobe Creative Cloud		x								
Server-set-up and tour			x							
File Structure			x							
Intranet Introduction	x									
Calendar/Conf. Room Reservation-Car checkout		x								
Travel Arrangements		x								
Video Conference		x								
Office Templates		x								
Project Filing Software Training			x							
Revit Standards			x							
Energy Modeling Software				x						
Skills and Expectations								x		
Annual Retreat		x								
Discount at local gym		x								
Personal mobile device discount		x								
<b>INTRODUCTION TO INVISION STUFF</b>										
General look at book	x									
Organizational Leadership										x
Partner Onboarding Lunch										x
401 K Plan	x									
Insurance Benefits	x									
Personnel Guide	x									
Tax Withholding	x									
Form I-9	x									
Spam Filter Information	x									
Safe Email Browsing	x									
Internet Policy	x									
Driving form	x									
Company Car Guidelines	x									
Auto Pay/Pay Stub	x									
<b>REPUTATION</b>										
Introduction to Marketing materials					x					
Schedule Professional Photo						x				
Take Temporary Photo						x				
Image Guide					x					
<b>PROFESSIONAL AFFILIATION</b>										
AIA or others	x									
IDP Information									x	