

# QUICK START **ONBOARDING**

## SESSION 6:

### PHASE #6 Towards First Anniversary

The fastest, most practical tools for  
workforce expansion you will ever see



presented by

Catie Paterson HR Business Consulting & Operation Verve

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## PHASE #6 Towards First Anniversary



**To win the marketplace, you must first win the workplace.**

*Doug Conant, President, Campbell Soup Company until 2011*



After the first six months on the job, your employee is no longer the naïve rookie that stepped through the front doors looking confused and fidgety. They should be reasonably competent already in the job. The rigorous onboarding process, tips and tricks have succeeded in transforming them. This should be evident from their check-ins and catch-ups during this time.

Most employers stop at this point and let the employee figure out whatever minor details are left, but you are not like most employers. You are invested in supporting your new starter right through the vulnerabilities of their first year with you to create successful outcomes for all involved.



## First Year Fast Facts



Harvard Business Review said it takes employees eight months to reach peak productivity, yet the average onboarding program lasts only three.



Companies who commit to an extended onboarding experience accelerate new hire proficiency by 34%.



40% of employees who don't receive the necessary job training to become effective will leave their positions within the first year.

# The 4 Pillars of The First Year

These are the items to be covered in this phase to address each of the four key pillars of a successful Onboarding Program:



**CULTURE**



**OUTCOMES**



**ADMIN**



**TEAM**

Induction feedback.

Career path +  
goal setting.

Induction feedback  
mechanism.

Check with other  
Team Leaders /  
Managers.

Anniversary gift.

Job + role reflection.

Complete formal  
probation review.

Feedback from  
peers.

# Sprinting Through The First Year

At this stage, your employee has begun to make solid steps walking in the right direction but can be made to sprint if given further guidance. A sprinting employee is great for the bottom line.

Most of the activities you have scheduled within the first six months of onboarding will be geared toward improving their confidence on the job. This also gives you the time to evaluate their skill level as they progress.

During the first 12 months, continue to ask questions about how they are settling in and become more direct with enquiring about the actual work they are completing. Keep them accountable to ongoing improvement in their Quarterly Reviews.

The end of the first year is also a moment to find out whether or not they are happy in their job. By doing this it will give you the opportunity to try and do something about it, whether that means making some relatively small adjustments to their position requirements or their workplace environment. You might need to think outside the square to keep your employee, but more often than not, it's worth it! Retaining a great performer keeps outcomes on the rise and turnover expenses as low as possible.

Plan to conduct a 'final' sit down with the employee, which can be combined with their annual performance review. After this review, the staff member is now 'truly settled' – time to start having regular check-in meetings as you do with any other team member.



# 6 - 12 month actions

## Quarterly Catch Up

- Let them know they can speak freely.
- Listen and do not interrupt.
- Avoid giving excuses if they bring up a flaw in the company.

## Find Out

- If their expectations align with the reality of their work.
- To what extent their skills and knowledge are being utilised, along with better ways of how to use them.

## Development

- Check in to see if their development, growth and professional goals are still the same as when you had your initial discussion.

## Celebrate and Recognise

- Appreciate the contributions of the employee.  
This is a sure way to boost engagement and loyalty.  
Think about planning an official platform where efforts and achievements can be celebrated. WooBoard is a fabulous tool for this, and so is Facebook Teams.

## Feedback and Suggestions

- Close to the end of the year, meet with the employee and their mentor/buddy to discuss the entire onboarding process.





## The Year Ahead

- You have communicated loud and clear that you want the employee to stick around for a long time.
- Involve them in your plans for the upcoming 12 months and ask them to suggest any better ways of doing things.

## Final Review

- Include the employee in the annual review process to assess their performance and behaviours.
- Measure the success of the onboarding program by asking the employee to complete a questionnaire, then analyse results.





# Towards One Year Anniversary

## After Probation

22% of new starters who receive a poor onboarding experience leave in the first year. Use the first anniversary as a great time to reflect on achievements and plan for the future.

## Celebrate Often

Employees who are happy, challenged, being heard and have development opportunities have a positive experience and greater likelihood that they will want to stay. Keep track of anniversaries and celebrate with the team.



# Activating Outcomes: 12 Month Competencies

By the end of their first year your new employee will have come along in leaps and bounds. The sky's the limit for them as they move forward with your business! Making sure they've squared away every part of their professional training and development is the essential final step of their success. Formalising the completion of their first year will not only tick the required administrative boxes. It will also boost the confidence of your new starter and their leaders. Best of all, nominating what it takes to succeed creates reasons to celebrate when these are realised. 79% of employees who quit their jobs cite lack of appreciation as the reason, so this positive acknowledgement is vital.

Remember these considerations when mapping out your 12 Month Competencies Checklist:

- Consider ways the new starter can demonstrate their success across the four key pillars: 1. Culture. 2. Outcomes. 3. Admin. 4. Team
- Create items in the form which can be simply ticked or rated for fast completion
- Include space for short comments against two or three items that need a more in-depth view
- Remember the importance of skills development as well as their attitude and engagement
- Work with the new hire to tweak this list at their six-month review, to foster a sense of ownership and focus on their behalf

**There are two parts to this task:**

1. Work with your team to brainstorm the items your new hire needs to achieve for their first year to have been successful

2. Use the following template below to guide you through the creation of a customised 12 Month Competencies Checklist for your new hire. Once completed, store and use this form online.

## New Starter 12 Month Competencies

**Manager Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**New Starter Name:** \_\_\_\_\_

**Successful? (circle YES or NO)**

### Skills Competencies

Rating or Yes / No	

Skills Development Comment:

## Team Competencies

	Rating or Yes / No

Team Development Comment:

## Personal Development Competencies


Personal Development Comment:

Other feedback (including strengths or concerns):

Actions recommended (if any):



# Culture In Focus: The Year That Was

A successful professional journey always goes hand in hand with personal growth. This is particularly true for your new starter. Completing their first year with you will usher them through many changes in their skills, their outlook and their social, emotional, and professional maturity. Asking them to reflect briefly about the year they've spent with your company will boost their engagement and confidence. It will also give you a window to see how you can best lead them forward. If a written reflection won't suit them, you can always invite them to record a short video of their reflections, or have a buddy interview them to support them through.

When presenting this task to your new hire, pose several open ended questions around some of these topics to help them get started:

- Personal growth
- Skills development
- A proud achievement
- Aspirations for the future
- Struggles they've faced
- Social experiences
- Ideas for the company

Go ahead and draft up an email inviting the new starter to create their 12 Month Reflection. Include questions about some of the key topics above, along with instructions on how to submit it when it's done. Explain that the reflection will be kept on file and also referred to in their 12 Month Review.

Subject Line

Email Text

Attachments



# Administration In Action: 12 Month Review

Holding a formal 12 Month Review meeting is the most effective way to tick all the boxes to finalise your new hire's first year, then officially move them into your mainstream management routines. This meeting is best done face to face. If you are working remotely, jump into a video conference call to maximise the connection. Like all meetings, this one should be supportive whilst remaining on point with a clearly defined agenda. This will ensure you complete all required items in the session without wasting precious time.

The meeting should include the owner, the new starter's buddy/mentor, their manager, and of course the new starter themselves. There are four key documents that should be spotlighted at this meeting:

- 1 Position Description:**  
Review the requirements of the role and discuss possible modifications moving forward
- 2 Goals Template:**  
Celebrate the achievement of these goals and adjust timelines for others remaining
- 3 12 Month Competencies:**  
Tick off completed competencies and adjust timelines for others remaining
- 4 The Year That Was Reflection:**  
Thank the new hire for their thoughts and discuss noteworthy items arising

Once these documents have been addressed, the meeting will move to a forward focus. Plan to set Quarterly and Annual goals around these areas:

- Personal growth
- Skills development
- Career development

Tweak the following template below to develop your own 12 Month Review agenda. Store and use this template centrally in the cloud to make it accessible for all, and much more environmentally friendly.

# 12 Month Review Template

Manager Name: \_\_\_\_\_

Date: \_\_\_\_\_

New Starter Name: \_\_\_\_\_

## Documents Review

	Done? YES or NO
Position Description Review	
Goals Template	
12 Month Competencies	
The Year That Was Reflection	

## Comments Arising From Docs Review:

## Goal Setting:

Goals	Quarterly	Annual
Personal		
Skills		
Career		

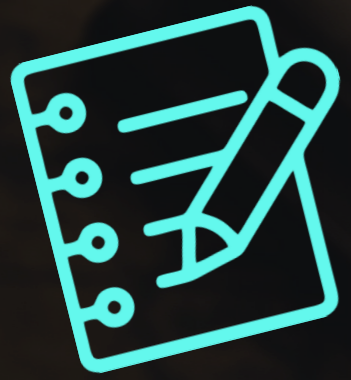
## Actions Arising:

Person	Action To Be Completed	Due Date
Employee		
Buddy		
Manager		
Owner		

Thank you for your first year of working with us! We're looking forward to many more!

Manager Name: \_\_\_\_\_

Date: \_\_\_\_\_



# Team Touch Points: 1 Year Anniversary Party

No milestone should pass in your business without a celebration. It lifts morale and makes work a fun and rewarding place to be. The successful completion of your new hire's first year is a spectacular reason to celebrate. It's a big deal!

When thinking about planning this party, remember these items:

- This is a chance to knit the team together so think broadly about invites
- Food and drink goes with parties, so plan them!
- Consider one or two people who might make a small speech to celebrate the guest of honour
- Think about preparing a small gift to present to the guest of honour at the event
- Take photos at the event and share them in your team spaces afterwards
- Allocate tasks to specific people with a due date to ensure they actually get done
- Assign one coordinator of the event to hold it all together
- It's not New Year's Eve! Keep the celebration to scale in budget, timing and duration

There are only two tasks remaining for you to complete your customised Onboarding System:



1. Draft three emails to spread the news of the Anniversary Party to the entire team

**a. Invitation Email (send one week before the party)**

Subject Line	
Email Text	
Attachments	

**b. Reminder Email (send one day before the party)**

Subject Line	
Email Text	
Attachments	

**c. Thank you email (send one day after the party; include at least one photo of the fun!)**

Subject Line	
Email Text	
Attachments	

2. Create a checklist to make sure the party is planned well and goes off without a hitch

#	Task	Responsible Person	Due Date
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

# Next Steps



Congratulations! What a monumental achievement you have made!

In this session we put the final cherry on the cake of your customised Onboarding system. We have finalised all the resources you will use to nurture your new hire through their first full year with you. After completing the activities for this last session you will have your admin squared away and your new hire up and running as a fully fledged member of your staff. You will have welcomed them to the fold and celebrated their epic success with the rest of your team.

Moving forward will see you taking action. It's important that you keep your new plans at the front and centre of your mind when you are expanding your team. Take pride in developing the tools you can use to nurture your new starter, equipping them with skills to perform with excellence. Dedicate yourself to equip them with skills to perform with excellence, and nurture them through to engage with the vision of your company. Invest fully in the process of improving them and keeping your processes sharp and up to date.

# Introducing Your Hosts

Taking action is essential for you to achieve the results you are looking for with your new staff, but you don't have to go it alone. We are both here to help you develop the resources you need to manage your team moving forward.



## Meet Catie Paterson

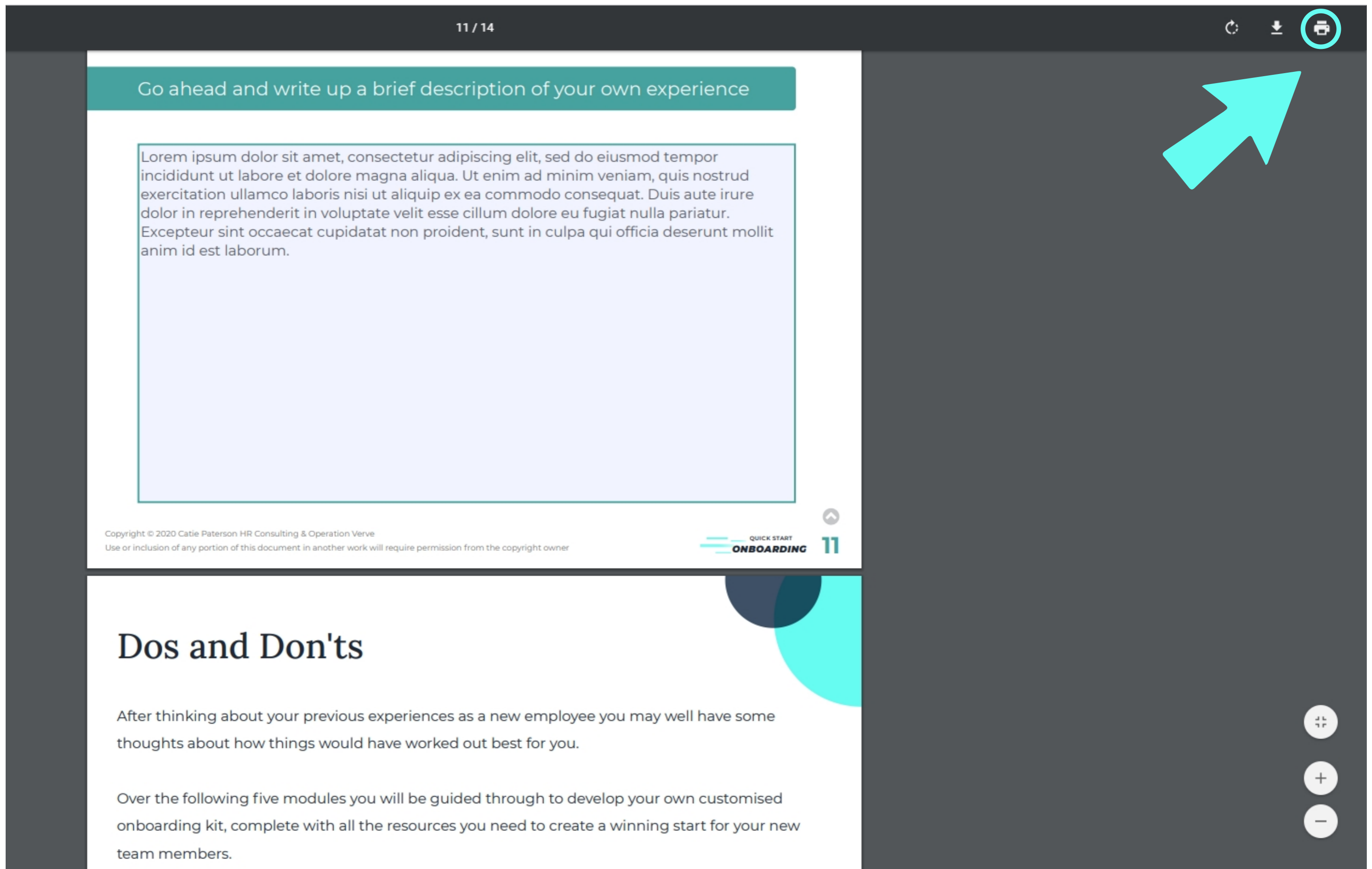
Catie Paterson Consulting pride themselves on being your bottom line; an extension of your business that offers tailored, result-driven and practical solutions no matter how small or large your business. From start-ups that require occasional human resources guidance to embellished businesses implementing HR projects on a national scale, we have the experience and passion to deliver the services you need.



## Meet Kerry Anne Nelson

Kerry Anne Nelson is the go-to person for all things process management. Whether you're developing a checklist to help your staff work well, a template, instruction videos, process manual or training resources, she can help you get it all sorted fast! Reach out to Kerry Anne if you would like to lock down solid processes in plain black and white. It's time to increase the efficiency and confidence of your team.

# Saving a PDF File on Google Chrome



The screenshot shows a PDF document in Google Chrome. The document content includes a header "Go ahead and write up a brief description of your own experience", a text area with placeholder text, and a section titled "Dos and Don'ts". The Chrome interface shows the page number "11 / 14" and navigation icons. A red arrow points to the "Print" icon in the top right corner of the Chrome window.

11 / 14

Go ahead and write up a brief description of your own experience

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QUICK START  
ONBOARDING 11

## Dos and Don'ts

After thinking about your previous experiences as a new employee you may well have some thoughts about how things would have worked out best for you.

Over the following five modules you will be guided through to develop your own customised onboarding kit, complete with all the resources you need to create a winning start for your new team members.

- Open the PDF file on Google Chrome
- Fill in all of the fields within the workbook
- After completing your workbook, select the Print icon

QUICK START  
**ONBOARDING**

## SESSION 1: Welcome to the Program

The fastest, most practical tools for  
workforce expansion you will ever see



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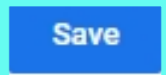


Print 14 pages

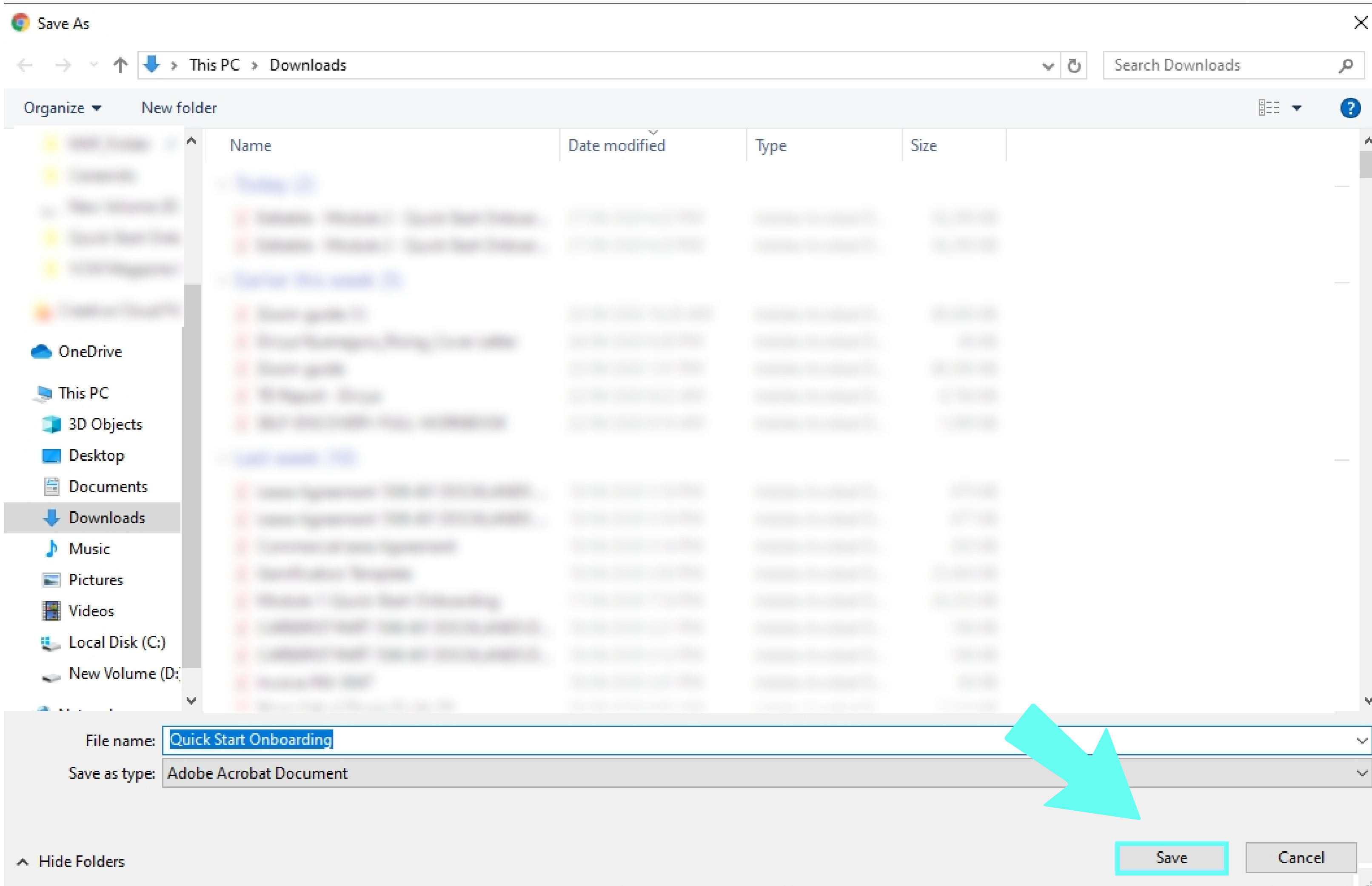
Destination 

Pages

Page 1

- Make sure the **Destination** reads **Save as PDF**. If it does not, click on the drop-down list and then select Save as PDF.
- Select the Save icon to save the file.



- Make sure to add a suitable name to the filename when you save, as it will help you to identify the workbook in the future.