From the Offer to the Office: Managing the Pre-Arrival Process

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GROUP EXERCISE

Learning Objectives – "STICK" It to 'Em

Structure: Develop a pre-arrival framework that can be used broadly and consistently across your organization.

Transparency: Demystify the new hire experience so your new colleagues know exactly what to expect and how to best prepare.

Inclusion: Reaffirm the new hire's value by recognizing the elements that make them a culture add for your organization.

Communication: Define the critical connection points and how to most effectively leverage each one.

Knowledge: Identify the tools, resources, and support new hires will have available to help them succeed before, during, and beyond their first day.
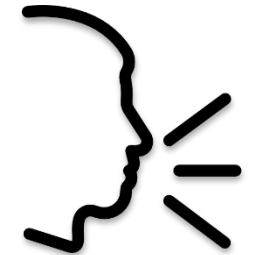
My Requests to You

Please be engaged! (i.e., please put phones and laptops away unless actively taking notes)

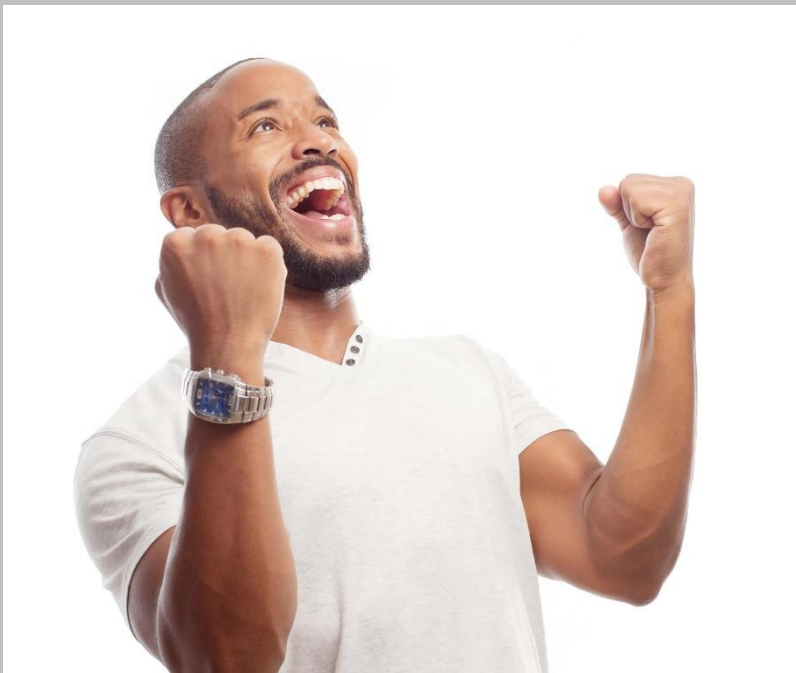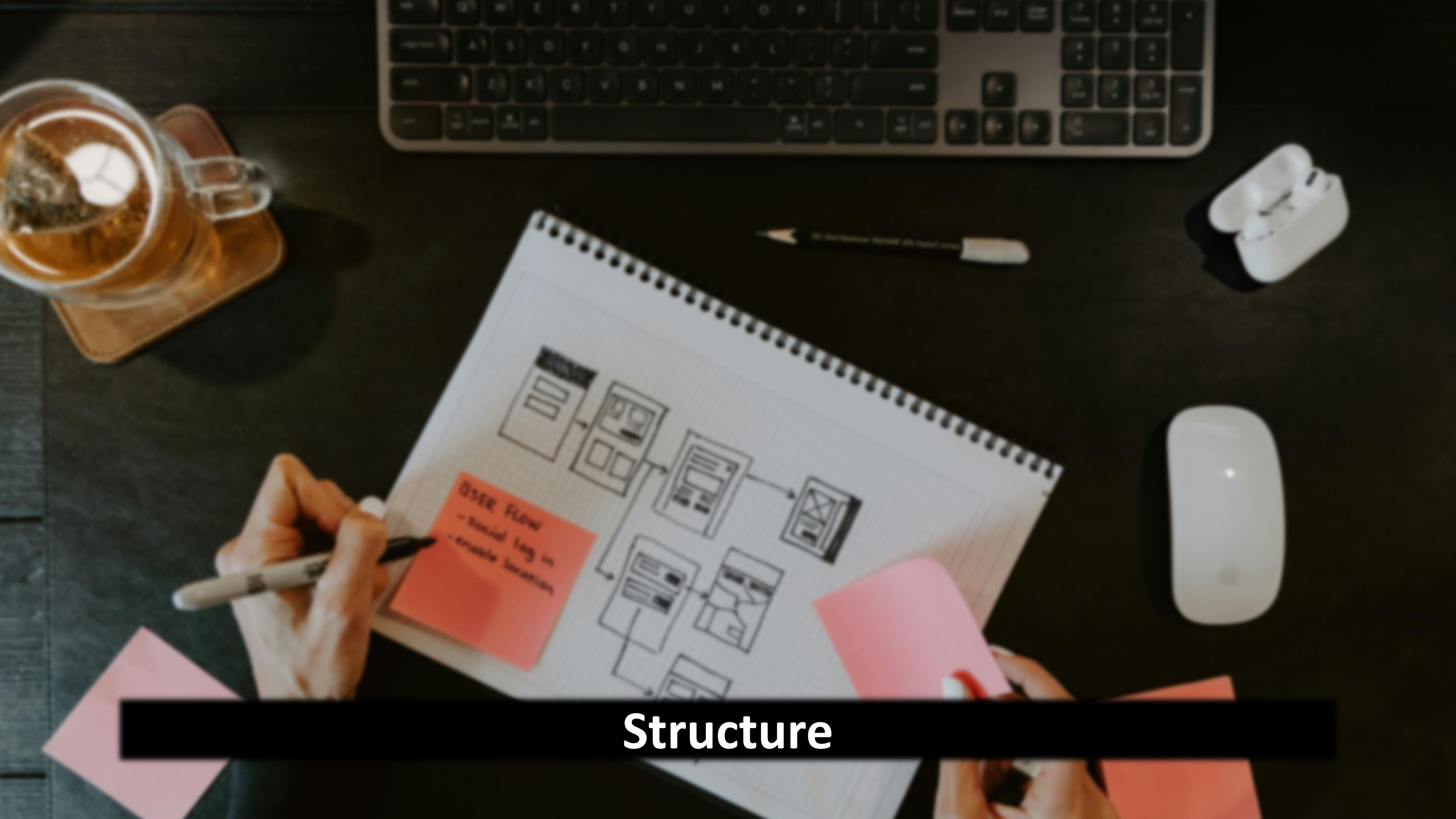**Please save questions (if possible)!** I'll be providing dedicated windows of Q&A time.

I have a mild stutter! Thanks for your patience in case it becomes especially apparent. ☺

The "WHY" Behind O&I

Structure

Structure

- **Onboarding** (a.k.a. "**Preboarding**") includes everything from the moment an offer is signed up through the employee's first day.

- **Integration** includes everything beyond the first day and is necessary to ensure long-term success and engagement.

- Two sides of the same coin, but with very different intentions and end goals!

Structure

- What processes are currently in place at your organization?
  - Are they working? If so, why? If not, why not?
- Where and how are structural components being documented?
  - Standard Operating Procedures (SOPs)
  - Best Practices
  - Training Plans
  - Subject Matter Experts (SMEs)
- Have you conducted a SWOT Analysis?
  - Strengths, Weaknesses, Opportunities, Threats
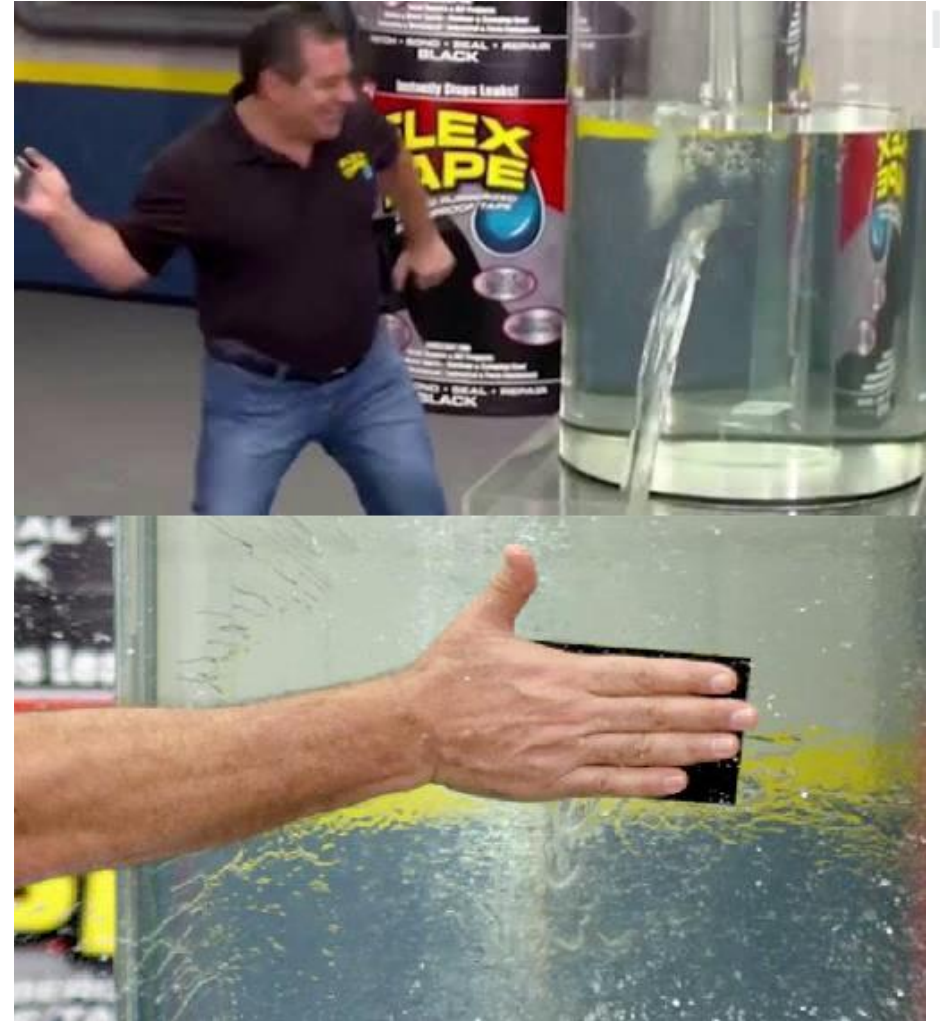
Structure

- Identify Your Core Components:
  - New Hire Paperwork
  - I-9 Verification
  - Work Classification (Essential? Hybrid? Remote?)
  - Office/Remote Logistics
  - IT Logistics
  - Workplace & Safety Training/Gear (e.g., PPE)
  - Orientation Schedule/Day 1 Outline
  - Integration Plan (e.g., 30-60-90)
  - Benefits Orientation
  - Mentor/Buddy Assignments

Structure

- Identify Your Key Players:
  - Recruiting/Talent Acquisition
  - HR (Onboarding, Payroll, Benefits)
  - IT
  - Training/Health & Safety
  - Manager/Supervisor
  - Mentor/Buddy/Liaison
  - Facilities Management
  - Marketing
  - Authorized Agent(s) (for I-9 Verifications)
  - Important Office/Organization Contacts

SAMPLE HIRING HOURGLASS

SIGNED OFFER

Identify Anticipated Start Date

Background & Reference Checks

New Hire Has Given Notice

Talent Acquisition works with hire on all necessary pre-employment steps

ONBOARDING

Pre-Hire Paperwork

Internal Hire Notices

Once all pre-hire checks are cleared, O&I Team works with Manager/Supervisor to generate internal notices, IT tickets, training plans, etc.

(This step is **ideally** done at least 7-10 business days prior to the hire's arrival)

HUMAN RESOURCES

Complete New Hire Setup in HRIS

Initiated once hire completes pre-arrival paperwork

IT & OFFICE SERVICES

Profile User Accounts & Deploy Equipment

IT sets up onsite workstation or ships setup for remote workers

FINISHING TOUCHES

Provide O&I Outline & Prepare for Arrival

Includes any remaining steps handled at the local/office level

Structure

- **What are your desired goals or outcomes?** For instance, do you want to:

  - Streamline the collection and/or handling of new hire paperwork?

  - Enhance pre-arrival communication?

  - Provide earlier access to tools, resources, and/or support?

  - Facilitate early engagement (or help build excitement)?

  - Create more personalized onboarding plans?

- Remember that changes can be small and incremental – what matters is that they are:

  - **Consistent** – Focus on the prix fixe menu before adding the a la carte options

  - **Sustainable** – Once you've made a change, stay committed to it

  - **Beneficial** – Are you doing it because you *can*? Or because you *should*?

QUESTIONS?

Transparency

Transparency

- Identify Your Key Resources:
  - Employee Handbook
  - Job Description
  - Benefits Information (Eligibility, etc.)
  - Dress Code Expectations
  - Payroll/Holiday Schedule (& First Check Date)
  - Company Intranet
  - Organizational Chart
  - Feedback Mechanisms (e.g., Reviews, Check-Ins)
  - Training & Development
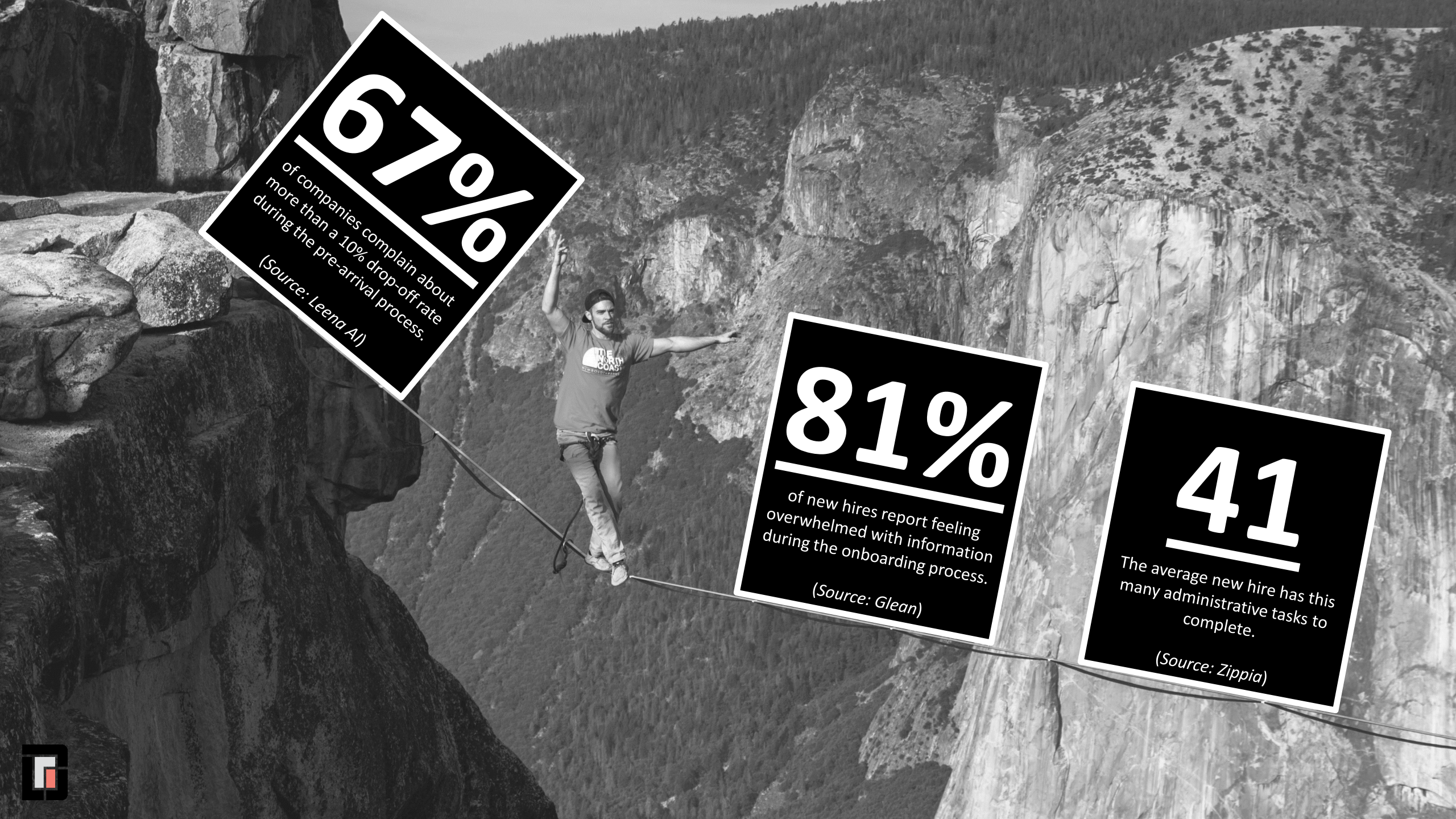 - Financial Health Data
  - Commitment to DEI

Transparency

- Which resources do you currently provide **before** the first day?

- Which resources do you currently provide **during** the first day?

- Which resources do you currently provide **after** the first day?

NOTE: *If the vast majority are **during** or **after**, take a moment to reflect on why and whether this is the best approach for your new hires.*

67%

of companies complain about more than a 10% drop-off rate during the pre-arrival process.

(Source: Leena AI)

81%

of new hires report feeling overwhelmed with information during the onboarding process.

(Source: Glean)

41

The average new hire has this many administrative tasks to complete.

(Source: Zippia)

Transcparency

- How do we make sense of this? What's the safest approach to take?
  - When in doubt, it's generally a best practice to give *more* information vs. *less*
  - Be concise with communications and resources; this is where the likelihood of overwhelm most often develops
  - Be realistic about which administrative tasks are due by when, and make it clear what's mandatory vs. optional/beneficial

Transparency

- Do we have:
  - A Mission Statement?
  - A Values Statement? (a.k.a. "Core Values")
- Do we have:
  - Career Development / Internal Mobility?
  - Feedback Mechanisms?
- Do we have:
  - A Game Plan for Day 1?
  - A Training Plan Outlined?

QUESTIONS?

Inclusion

Inclusion

- Things to Learn & Use:
  - Preferred Name (Spelling & Pronunciation)
  - Gender Pronouns
- Resources to Provide:
  - Affinity Groups
  - Employee Resources Groups (ERGs)
  - DEI Resources
- Traits to Demonstrate:
  - Core Values
  - Mission Statement

Inclusion

- **What's in a name?**
  - Can carry cultural significance
  - Recognition as an individual
  - A tool for relationship building
  - It's a fundamental part of our identity
- **If we miss this step:**
  - Colleagues will often feel undervalued or disrespected
  - Unconscious bias can develop

GROUP EXERCISE

Inclusion

"We just hired a new girl in Accounting who starts on Monday."

"Ahmad is brand new to this kind of work so he may need some extra TLC."

"Trina will be a great culture fit for our team."

Inclusion

"We just hired a new girl in Accounting who starts on Monday."   **VS**   *"Susan joins us on Monday as our new Senior Financial Analyst."*

"Ahmad is brand new to this kind of work so he may need some extra TLC."   **VS**   *"Ahmad comes to us with nearly 10 years of related experience."*

"Trina will be a great culture fit for our team."   **VS**   *"Trina will complement our strengths while making our team even better."*

The way we introduce new colleagues matters!

Inclusion

- Identify your new hire's primary learning modalities
  - Visual
  - Auditory
  - Kinesthetic
- Identify your new hire's preferred communication and working styles
  - What level of engagement do they need?
  - How can we strike a balance between being available while not micromanaging?

# Inclusion

- Promote **disability awareness** in your outreach efforts!

  - If a new hire voluntarily self-discloses as having a disability, you can proactively offer them resources for how to request reasonable accommodations if needed

  - You can also ask if there are any special needs or accommodations that are specific to their onboarding or early integration

QUESTIONS?
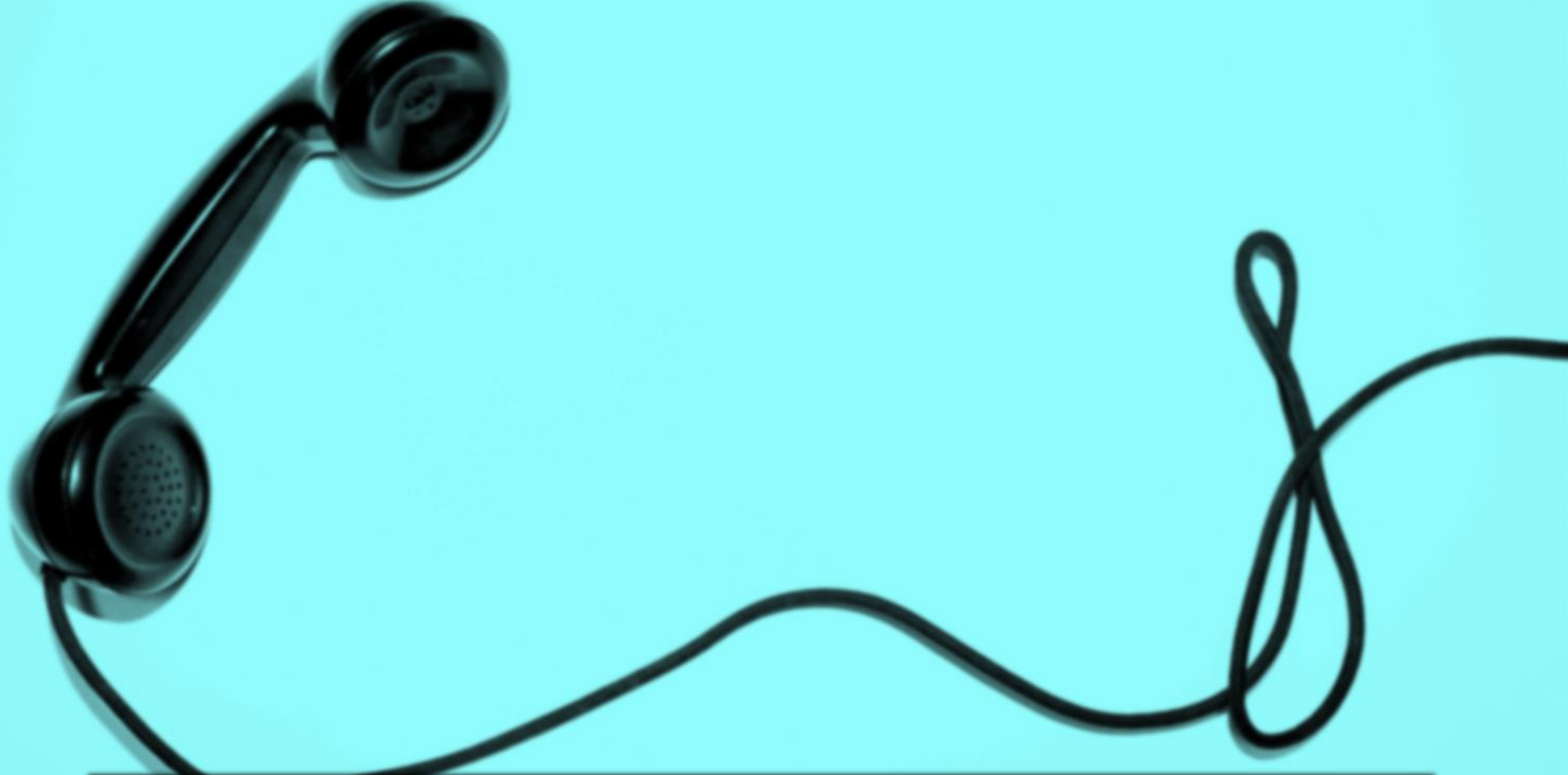
Communication

Communication

- Key Connection Points:
  - Offer Stage
  - Receiving the Signed Offer
  - Pre-Hire Clearances
  - "Next Steps" Communication
  - Pre-Arrival Call
  - Day 1 Outline
  - Orientation Outline / Integration Plan
  - Social Media / Marketing Announcement
  - End-of-Day Check-In (Day 1)

Communication

- Send a "Next Steps" Email
  - Congratulate them on their new role!
  - Outline next steps (e.g., paperwork) and call out important deadlines
  - Provide key contact(s) who can answer questions leading up to the first day
- Consider Scheduling a "Pre-Arrival Call"
  - Invite the manager/supervisor and other key team members
  - Include important office contacts to help coordinate on-site logistics as appropriate
  - Use this time to answer questions and set expectations for what's ahead

Highlights from this Email:

- Please watch for a link to complete your new hire paperwork by _____ (*if possible*).
- Please start gathering your **I-9 verification document(s)** so it's readily accessible before your first day.
- Please review the **"Setup & Training Considerations"** section to help us formulate your early integration plan.

Hi, _____ –

We're thrilled to have you joining us at DWT! As a follow-up to _____ email, my name is Chris and I serve as our Manager of Onboarding & Integration here at Davis Wright Tremaine LLP. Detailed below are some important action items we'll need you to complete in order to remain on track for your start date of _____. If you have questions at all while reviewing this information, please feel free to respond to this email so we can assist you.

New Hire Paperwork

You should have hopefully received an e-mail from HumanResources@dwt.com titled "**Welcome to DWT! (Important Action Item Enclosed)**" with instructions to complete your onboarding paperwork online. We ask that you *please complete this step no later than* _____ *(if possible)*, as this triggers other internal communications and allows us to have everything lined up for a smooth launch on your first day. Altogether, the paperwork should not take more than about 20 - 30 minutes to complete.

To log in, you will be prompted to reset your password – simply enter your personal email address (*where you received the email*) and follow the instructions to access your paperwork.

Communication

- Prepare a "Day 1 Outline"
  - Provides a granular view of scheduled activities with expected goals/outcomes
  - Identifies key individuals and resources helping to set them up for success
  - Factors in rest periods for breaks, lunches, and self-study/review windows
- Other Factors to Consider:
  - Are you planning a Welcome Lunch?
  - Are there required trainings that must be completed on Day 1 for internal compliance?
  - Who's on deck to provide support along the way for questions or troubleshooting?

TUESDAY, OCTOBER 1, 2024

When	What
8:45am (PT)	**Arrive @ DWT Seattle** *920 Fifth Ave* *Suite 3300* *Seattle, WA 98104* *(206) 622-3150*
8:45am – 9:15am	**Welcome to DWT! – NAME** _____ will welcome you, offer you a quick tour of the office, and briefly discuss what's to come before your orientation formally begins. We will also complete the final step in the I-9 verification process during this time.
9:15am – 10:15am	**Deskside IT Orientation – NAME** One of our Technology Coaches will meet you at your desk to assist you with connecting to the DWT network, using the firm-issued equipment provided to you. Topics generally include: • Logging in / changing password • Security overview • Identifying printer locations (*for in-office work*) • Software Center
10:15am – 10:30am	**Break**
10:30am – 12:30pm	**New Hire Instructor-Led Training – NAME** Our Training team will provide a live course on commonly used systems and software, including: • Intranet (Portal) Overview • DWT Learning • Microsoft Word Templates (letter/memo) • SharePoint – Saving Documents, Searching *via Teams – check calendar for details.*
12:30pm – 1:30pm	**Lunch Hour**

Communication

- Where (and when) should they plan to arrive on their first day?
  - Is it a secure facility? Will someone need to escort them from a common area?
- For remote hires, who is greeting them virtually on their first day?
  - How is their I-9 verification being handled?
- Are we mailing or shipping anything to them beforehand?
  - If yes, are they aware of this? (e.g., does it require a signature?)

Communication

- How about **internal** communication?

How are we communicating with:

  - The Manager/Supervisor?
  - The New Team?
  - Local Office Staff?

- Are we sharing:

  - Name Pronunciation & Gender Pronouns?
  - Reasonable Accommodations (if known)?
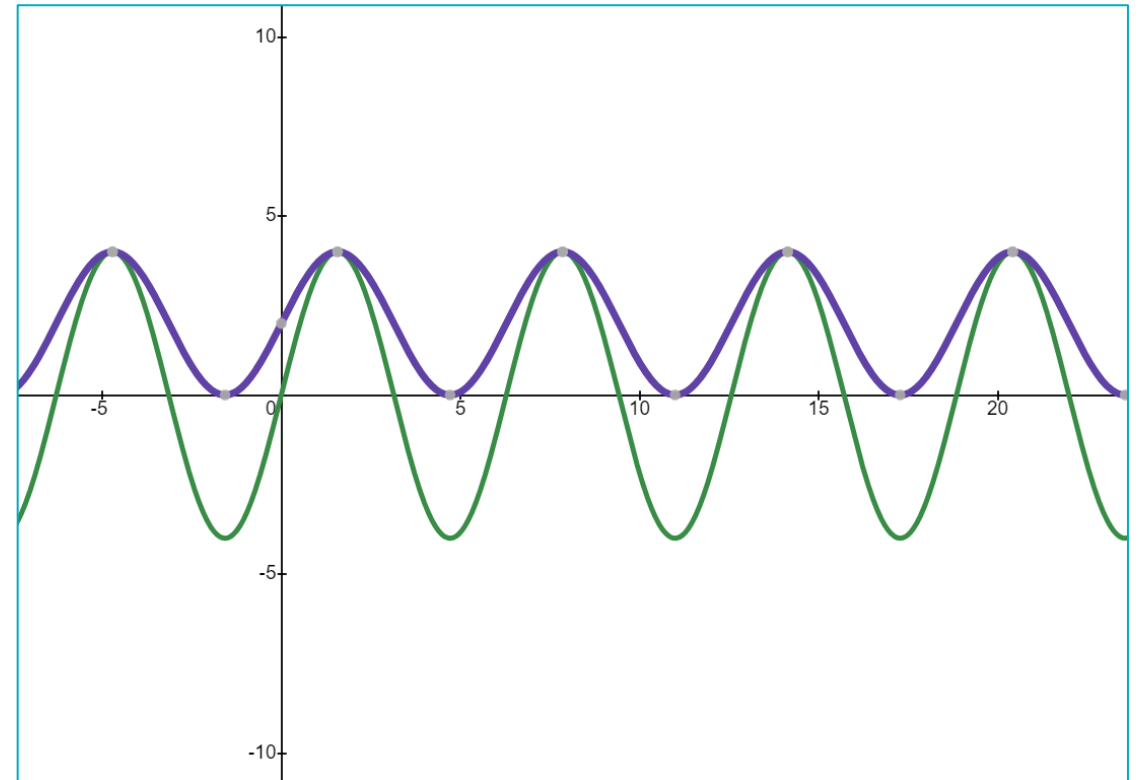 - Highlights of Skills & Accomplishments?

QUESTIONS?

Knowledge

Knowledge

- Knowledge first starts with us!
    - How do we play to our strengths while shoring up our weaknesses?
    - Onboarding should not be a series of "peaks and valleys"
- Have we developed S.M.A.R.T. goals for how we want to improve?
    - **S**pecific
    - **M**easurable
    - **A**ttainable/**A**chievable
    - **R**elevant/**R**ealistic
    - **T**ime-Bound

Knowledge

- Three key questions to consider for each new hire before Day 1:
    - **WHAT** do I **USE**? (*Tools*)
    - **WHERE** do I **GO**? (*Resources*)
    - **WHO** do I **CALL**? (*Support*)
- Which of these can be accessed at which times during the onboarding process?
    - Will any of the available tools, resources, and/or support options change along the way?
- Have we identified our training goals and our metrics for success along the way?

Knowledge

- Identify which communication styles you can commit to using (or improving)
- Provide new hires with as much information as you can reasonably provide before their first day
- Build inclusive language and practices into every facet of onboarding
- **Use this opportunity to put your values into practice!**

QUESTIONS?

Key Takeaways

Key Takeaways

- Remember that **we're hiring humans!** Each hiring experience is unique and there are plenty of ways we can help take it to the next level.

  - What kind of **structure** are you currently using? Is it easy to follow and user-friendly?

  - How are you demonstrating **transparency** throughout the onboarding experience?

  - What steps are you taking to help new hires feel **included**, valued, and supported?

- **The pre-arrival process is crucial** to the early success and development of your new hires! The way we engage with them can make or break the experience.

  - Are we leveraging our **communication** outlets effectively and concisely?

  - Have we made ourselves **knowledgeable** about our areas for growth?

  - How do we translate that knowledge into the **tools**, **resources**, and **support** we offer?

THANK YOU!

Davis Wright Tremaine LLP

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