

**On-boarding Your New Employees  
&  
Developing Your Employee Manual**

Presented by:  
Danielle S. Caricofe & Matt Raynes

# On-boarding your new employees – How to retain them from the start

By: Danielle Caricofe, SVP Human Resources  
Machias Savings Bank

# 5 Steps of Onboarding

*Step 1: Hire Right*

*Step 2: Make an Impression*

*Step 3: Create a Training Schedule*

*Step 4: Mentor Program*

*Step 5: 90-day review*

# On-boarding is a Group Effort

- *HR – Admin./Regulatory & Culture*
- *Manager/Department – OJT & Culture*
- *Mentor – Culture*

# **Step 1: Hire Right**

*Vision, Mission, Values*

# **Step 2: Make an Exceptional First Impression**

# Making a positive first impression

- *Phone Call from Department Head or President*
- *Welcome flowers/card sent home*
- *Friendly letter with important information, instructions, employment paperwork, two-week training schedule*
- *First day – office set-up, logo item, tour of office, meet & greet*

# **Step 3: Create a Training Schedule**



# What to Include

- *At least two weeks*
- *First day/week: Hour by hour (who, what, when, where & why)*
- *Leave gaps to fill-in “electives” and areas for further development*
- *Include department visit/overviews*
- *Try to use same/similar schedule for same/like positions*

# What to Include

– *Other things to include:*

- *Tour of facility*
- *HR meeting – benefits, etc.*
- *Payroll – how to complete a timesheet*

*\*Put yourself in their shoes, what will they be focused on/  
distracted by – benefits, pay, bathrooms, break rooms, etc.  
Eliminate the distractions.*

# **Step 4: Mentor Program**

# Why a Mentor Program Works

- *Great for the employees*
  - *Think college “advisor”*
  - *Gives them an outlet*
  - *Mentors are trained to “do a good job”*

# Why a Mentor Program Works

- *Great for the company*
  - *Creates efficiency*
  - *Takes a load off of task saturated managers*
  - *Less things to slip through the cracks*
  - *Happy new hires = retention*

# Making it Successful

- *Choose mentors who are the right “fit”*
  - *Experience, personality, willingness*
  
- *Create a schedule for the mentors*
  - *First day*
  - *Multiple weeks*
  - *E-mail, phone call, in-person visits*
  - *Create “scripts” for e-mail*
  - *Make it fun (puzzles, games, prizes)*

# Making it Successful

- *For a successful program, you need to:*
  - *Someone needs to “own” the program*
  - *Have well trained mentors*
  - *Good training material*
  - *Have open lines of communication between mentor/manager*
  - *Review complete program at least annually, if not more*
  - *Continuously monitor “pipeline”, don’t let advisors get overloaded*
  - *Get a one-year commitment from mentors and reassess annually*

# HR's role in on-boarding

- *Owens the Advisor Program*
- *Checklists*
  - *Employment paperwork*
  - *Regulatory training*
  - *Personnel File*
  - *Survey new hire on their experience*



# Manager's role in on-boarding

- *Day-to-day guidance*
- *Coordinate OJT*
- *Check for understanding & buy-in*
- *Continually assess training needs*
- *Monthly formal check-ins*
- *Check-in with Mentor*

# **Step 5: 90-day Review**

# 90-day Review

- *Formal document*
- *Should be no surprises*
- *Should be based on the company's competencies*
- *Development Plan could be developed*
- *Action Plan could be developed*

# The legal considerations of New Hires & On-boarding

By: Matt Raynes  
Eaton Peabody

# Background Checks

- Conduct them
  - Can do them through the State of Maine at relatively low cost
  - If you use a third party, FCRA
  - Make sure your application contains consent to conduct

# Background Checks

- Make offer of employment conditional
- Make sure you have the results before they start working
- Conduct them on everyone, or on class of positions, but do not cherry pick new hires for background checks

# I-9 Process

- Administer process uniformly
- If a document looks suspect, check it against sample or call someone
- Complete within 3 days of hire

# I-9 Process

- Save copies of supporting documents?
- Store separately from personnel file
- DO NOT CUT CORNERS



# I-9 Process

- Remember this: **M-274**
- Employer's Handbook
- It is a useful guide to I-9 completion

# Required Training

## Anti-Harassment and Safety Training

- Make sure it occurs in a timely manner
- Get new hires to sign off on attendance

# Set Expectations

Set and manage expectations up front

- What standards do you expect the new employee to meet?
- Make sure standards and expectations are clearly communicated

# Introductory Period

**USE IT!!**

# Introductory Period

- Calendar introductory period
- Make sure you assess performance during and at conclusion of introductory period
- Make the hard choices then

# Developing your “Welcome Manual”

By: Danielle Caricofe  
Machias Savings Bank

# Make an Impression

## – *Brand it!*

- *“Everything speaks”*
- *Everything a new hire touches should be derived from your brand*
- *Colors, logos, lingo*
- *Attributes*
- *Employee Testimonials*

## – *Make it fun and interesting*

- *Use company jargon*

# What to Include

- *Getting Started (Let's get Started)*
  - *First day checklist*
  - *Employment/payroll forms*
  - *Employee questionnaire*
  
- *Brand Information (Our Exceptional Brand)*
  - *Welcome letter from President*
  - *Brief History of the company*
  - *Vision, Mission, Values*



# What to Include

- *Job Specific Information (What do I actually do here?)*
  - *Job Description*
  - *Expectations*
  - *Org. Chart*
  
- *Benefit Information (The perks...well some of them)*
  - *Insurance plans, prices*
  - *Paid time-off*
  - *Corporate discounts, perks*

# What to Include

- *Customer Service Expectations (Exceptional Service)*
- *Policies/Standards (What's expected of me)*
  - *Professional Appearance*
  - *E-mail, phone, presentation*
  - *Computer policies*
  - *How to use the phone system*

# What to Include

- *“Fun Stuff”*
  - *Rewards Programs*
  
- *Policies that need acknowledgement*
  - *Conflicts of Interest*
  - *Privacy*
  - *Sexual Harassment*
  
- *How you measure success*
  - *Scorecard, Strategy Map, Sample Evaluation*

# Random Tips

- *Use a 3-ring binder so new employees can add to it. It becomes their “bible”.*
- *Make sure trainers know it inside and out*
- *Color code policies & acknowledgements*
- *Create a scavenger hunt*
- *Google Forbes article on Apple’s secret training manual*

# Developing your Employee Handbook

By: Matt Raynes

Eaton Peabody

# General Rules

- **Keep it simple**

- Use easily understood language
- Easy to update
- Maintain flexibility: “May” not “Shall” or “Will”

# General Rules

- You do not need a policy for everything!
  - Remember: You will also be held to the policies you create!
  - Do not go overboard and do not overpromise

# General Rules

- Only include employment policies
  - Do not include policies with respect to applicants
  - Can it be moved to operations policies?



# At-Will Employment

- At will employment disclaimers
  - Make sure they are prominent
  - Make sure they do not violate the NLRA

# At-Will Employment

## **AT-WILL EMPLOYMENT**

The relationship between you and the Company is referred to as “employment at will.” This means that your employment can be terminated at any time for any reason, with or without cause, with or without notice, by you or the Company. No representative of the Company has the authority to enter into any agreement contrary to the foregoing “employment at will” relationship. Nothing contained in this handbook creates an express or implied contract of employment.

# Introductory Period

- Set forth introductory period
- Explain what it is designed to do
- Benefit eligibility during introductory period?

# Discipline/Corrective Action

- Retain flexibility
- Make it clear that you can skip progressive disciplinary steps
- Watch laundry lists of offenses

# Benefit Descriptions

- Refer to basic types of benefits offered (i.e. group health, LTD, etc.)
- Avoid too much detail on plan terms
- Refer to benefit plan itself for detail
- Reserve right to change/amend offerings and benefits

# Typical contents

- Welcome
- At-will employment
- EEO/Non-Discrimination
- Company policy and procedures
- Employment classification
- Attendance
- Leave policies
- Work performance
- Discipline/corrective action
- Employee health and safety
- Benefits
- Acknowledgement

# But they seemed innocent enough

- Employee classification: Exempt/Non-Exempt/Temporary/PT
- Open door policy
- Dress code
- Grievance

# Policies to have reviewed

- EEO statement
- Anti-harassment/discrimination
- Whistleblower
- Maine or federal FMLA
- Grievance/appeal/hearing policies
- Acceptable use policy (i.e. computers)
- Social media
- Solicitation



# Acknowledgements

- Make sure new hires sign acknowledgment that they have received, read, and understand

# Questions?

Thank you!

For training material, e-mail:  
[dcaricofe@machiassavings.com](mailto:dcaricofe@machiassavings.com)

