

# Hiring Leader Onboarding Experience Guide

*Keys to increase retention, effectiveness and leadership success*



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***Dear Hiring Leader,***

**Congratulations on hiring your new leader!**

As a hiring leader, you know that one of the critical factors to our success is a dedicated and passionate leadership team. To support you in your role as a hiring leader, we offer a comprehensive onboarding experience with tools and resources needed to fulfill your responsibilities with confidence and understanding.

Our employees are our most important asset. They make this organization, “The best place to be your best,” and they help us achieve our mission every day: Deliver excellent care with compassion. Now, you have the mission of guiding and engaging your new leader in learning about their role and responsibilities. You also impact their onboarding experience by helping them to be best positioned for success, to deliver results and by building their confidence.

The Hiring Leader Onboarding Experience presented in this framework is intended to provide you with the information you will need to successfully assist your new leader in their transition into our organization. I encourage you to take advantage of this framework and explore the resources that will assist you in this process as a hiring leader.

Again, congratulations on your recent addition to your leadership team. We look forward to working with and supporting you in the years ahead.

Sincerely,



**Adriene McCoy**  
**Corporate Vice President and**  
**Chief Human Resource Officer**

## Framework Summary

The quality of your leader’s transition to a new role can greatly impact his/her success. Onboarding is a shared responsibility with activities managed by you, Human Resources and other key partners. Each of these roles is critical in supporting the successful assimilation of your new leader at Baptist Health South Florida.

This onboarding guide will assist you in facilitating your new leader’s onboarding and transition process by: providing action steps for accelerating your leader’s transition in the organization, and giving you tools and techniques to support your new leader’s transition.

### Orientation vs. Onboarding

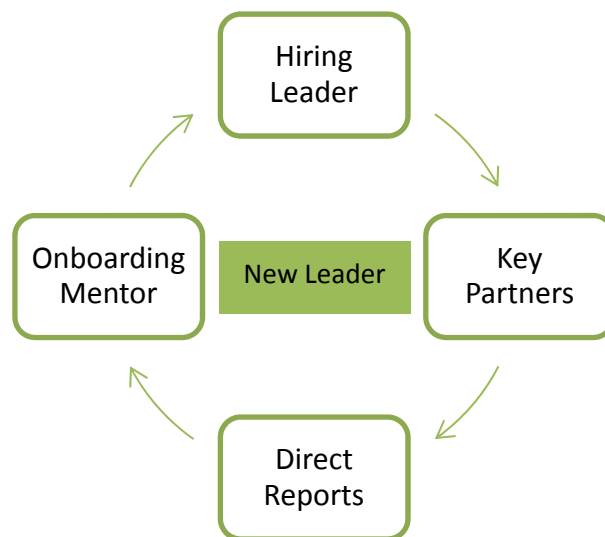
- Orientation is an event that provides the new leader with enough information to get started such as organizational structure, policies, and procedures. It is only one part of onboarding.
- Onboarding is a process. Its goal is to align the new leader with Baptist Health's culture, mission, and values. It is a strategic plan that ensures your leader’s success more effectively than orientation alone.

General Benefits of Effective Onboarding	Baptist Health’s Onboarding program will assist new leaders to:
<p><b>Best practice organizations show that well-planned and organized onboarding programs:</b></p> <ul style="list-style-type: none"> <li>• Increase <i>productivity</i> and <i>retention</i></li> <li>• <i>Reduce anxiety</i> and stress</li> <li>• <i>Reduce new hire turnover</i></li> <li>• <i>Prevent future spending</i> on recruiting and training</li> <li>• Foster <i>employee engagement</i></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Promote him/herself.</b> Successful new leaders put the past behind them and get a running start by learning all they can about their new job.</li> <li>• <b>Learn the new role faster.</b> A new leader must customize his/her approach by quickly learning about our organization’s culture and politics.</li> <li>• <b>Choose the right plan of action.</b> Selecting the right action plan requires a careful understanding of the business and department. Only after your leader has analyzed the situation can he/she choose the right actions that will get results.</li> <li>• <b>Make good things happen right away.</b> Early “wins” excite and energize people and build your leader’s credibility.</li> <li>• <b>Build a winning team.</b> Without a great team, your leader will face severe difficulties because no leader can achieve ambitious goals on his/her own.</li> </ul>

## Roles and Responsibilities during the Onboarding Process

Your leader will rely on several people to enable a successful transition; these individuals will support your leader during the assimilation process during the first year. The new leader will draw upon the individuals around him/her depending on the circumstances, deliverables, and expected outcomes.

These supporting individuals can help your new leader discover and apply awareness of unique characteristics to the challenges and opportunities he/she will face, leading to innovative contributions and high value to the organization. These individuals may play the role of guide and advisor as your new leader moves through the key tasks associated with successful integration.



### The Role of the New Leader:

- Drive the onboarding process by proactively seeking key information and support
- Partner with key people to accelerate success
- Understand the role and the organization
- Choose the right plan of action to deliver results

### The Role of Key Partners:

- Assist the new leader in learning Baptist Health South Florida's culture and organizational climate
- Partner, provide support and collaboration
- Offer guidance
- Work together in making the transition possible

**The Role of Direct Reports:**

- Ensure the new leader learns about them, their capabilities, skills and work styles
- Figure out how to work together
- Build collaboration and partnership
- Offer support

**The Role of the Mentor:**

- Act as a sounding board for ideas/concerns about challenges in his/her new role; provide insights into possible opportunities
- Identify resources to help the new leader enhance assimilation into new culture
- Expand the new leader's network of contacts
- When appropriate, play devil's advocate to help the new leader think through important decisions and strategies

**The Role of the Hiring Leader:**

- Support the new leader during the onboarding process
- Identify resources
- Act as a direct advice-giver to assist the new leader process
- Set work expectations
- Lay out the onboarding plan and follow up regularly
- Make sure the transition is smooth and successful

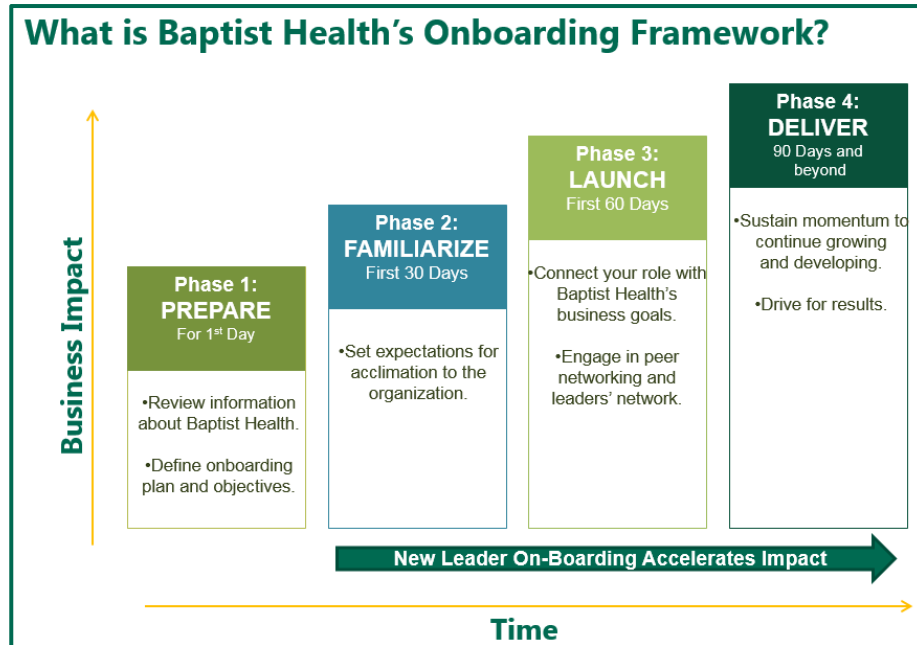
# 1. Tips for the Hiring Leader:

Below are important tips for you as the hiring leader to fully support your new leader during the onboarding process.

Onboarding is:	Leaders Tips	Tools/Links
A process, not an event	<p>Onboarding can be overwhelming for new leaders, even those with experience. Keep close contact to make sure things are going well.</p> <p>Use the on-boarding checklist provided in this guide so leaders know what to expect.</p>	<p><b>Hiring Leader’s Onboarding Checklist: Page 8</b></p> <p><b>Hiring Leader’s Activity Checklist: Page 28</b></p> <p><a href="#">New Leader Onboarding Website</a></p>
About more than filling a job	Introduce the new employee to colleagues and key partners. Discuss the formal and informal culture, values, and practices of Baptist Health and of the department. Send out an announcement to relevant team members (internal and external to your department) in advance.	<b>New Leader Email: Page 10</b>
A team effort	Get buy-in and involvement from all members of your team. Use a mentor to assist with the transition. Remember that the new leader also has the responsibility for making the onboarding process a success. Use the team assimilation process to build trust and further team development.	<p><b>Mentor Program: Page 11</b></p> <p><b>Team Assimilation (optional): Page 21</b></p>
Planned and structured	Time invested upfront in planning onboarding activities will develop your new leader faster. The plan should be consistent and able to be reproduced for all new leaders. Remember to mix strategies – use observations, presentations, demonstrations, practice – and be flexible enough to be able to meet individual needs. New leaders may move through the process at different speeds and in different ways. Document the process while it’s happening and evaluate the effectiveness of on-boarding after.	<p><b>Check-in Interview: Page 19</b></p> <p><b>Review Leader Essentials: Page 12</b></p> <p><b>Review Annual Performance Goals</b></p>

## 2. New Leader Onboarding Quick Start Framework and Onboarding Checklist:

With the ongoing support from you and the organization, the assimilation process will take approximately one year as your leader navigates his/her new role. The two graphics provide a four-phase framework of the new leader onboarding experience at Baptist Health: Prepare, Familiarize, Launch and Deliver.



<b>HIRING LEADER'S Checklist</b>			
<b>Phase I PREPARE</b> Before 1 <sup>st</sup> Day	<b>Phase 2 FAMILIARIZE</b> First 30 Days	<b>Phase 3 LAUNCH</b> First 60 Days	<b>Phase 4 DELIVER</b> 90 Days & Beyond
<ul style="list-style-type: none"> <li><input type="checkbox"/> Call the new leader to welcome him/her and arrange to meet 1<sup>st</sup> day</li> <li><input type="checkbox"/> Select an onboarding mentor</li> <li><input type="checkbox"/> Schedule a pre-onboarding meeting with an OD consultant</li> <li><input type="checkbox"/> Prepare the workspace (equipment, supplies)</li> <li><input type="checkbox"/> Prepare agenda for 1<sup>st</sup> day meeting</li> <li><input type="checkbox"/> Send out announcement regarding new leader</li> </ul>	<p>During the critical first weeks:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Schedule an informal welcome breakfast or lunch</li> <li><input type="checkbox"/> Arrange a meeting with an OD consultant and HR Site representative</li> <li><input type="checkbox"/> Set up a meet and greet schedule</li> <li><input type="checkbox"/> Review job expectations and responsibilities</li> <li><input type="checkbox"/> Conduct your 30-day retention meeting</li> <li><input type="checkbox"/> Review the onboarding plan</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Assess how team and new leader are doing</li> <li><input type="checkbox"/> Conduct weekly update meeting</li> <li><input type="checkbox"/> Review goals and objectives</li> <li><input type="checkbox"/> Define key areas for success</li> <li><input type="checkbox"/> Ensure new leader is attending orientation and training sessions</li> <li><input type="checkbox"/> Follow up on 60 and 90-day retention meetings</li> <li><input type="checkbox"/> Ensure onboarding mentor and new leader are meeting</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Conduct weekly update meetings</li> <li><input type="checkbox"/> Discuss key insights, accomplishments and challenges</li> <li><input type="checkbox"/> Over time, provide the new leader with more autonomy and ownership</li> <li><input type="checkbox"/> Encourage the leader to continue to develop his/her network</li> <li><input type="checkbox"/> Hold yourself accountable for the leader's onboarding process</li> </ul>

\*For a more comprehensive checklist, refer to page 29 in the appendix (click here).



## Before 1st Day

The goal of the prepare phase is to plan the new leader's arrival and to ensure the supervisor/manager's successful entrance into the organization.

### In this section we will cover:

1. Initiating the Process of Pre-Onboarding
2. New Leader E-Mail Announcement
3. Onboarding Mentor for New Leaders
4. The Leader Onboarding Pathway Summary

### 1. Initiating the Process of Pre-Onboarding:

- Hiring leader, Organizational Development Consultant (ODC), and HR Director create the onboarding experience for the new director. Typically, the ODC will serve as the onboarding coach.
- Hiring leader creates a list of key Baptist Health partners and leaders with name, title, phone number and email address. Include suggested topics for discussion on the first day.
- Hiring leader develops a briefing folder with:
  - Key information about the company and department (e.g., structure and mission, background, financial information)
  - Organizational chart
  - List of direct reports, partners, and other key contacts
  - Bios or resumes of direct reports along with organizational charts pertinent to the Manager's departments
  - Baptist Health strategic plan and entity specific strategic plan, if applicable
  - List of acronyms
  - Required training information
  - List of recurring meetings
  - Maps with building and parking information
  - Calendar with major tasks for the first 30 days
- The hiring leader verifies with his/her recruiter any protocols on People Soft for the onboarding checklist.
- The hiring leader and ODC discuss potential mentor(s) for the new supervisor/manager.
- The hiring leader reaches out to the mentor to gain agreement and engage in assimilation of new leader.
- The Hiring Leader provides direct reports and staff with an introductory email of the new leader.

## 2. New Leader E-mail Announcement

The following template is designed to help hiring leaders introduce a new leader to the team. Please note that this is only a suggested format. As you make changes to personalize the email, please keep three things in mind:

1. *Be Upbeat:* Focus on how excited you are to welcome this new leader.
2. *Be Brief:* It's important to provide background information on your new leader and his or her responsibilities, but be careful to not go too in-depth and potentially set false expectations for the team regarding the new leader's role.
3. *Be Helpful:* Encourage the team to welcome and assist the leader in the onboarding process.

### Sample Announcement:

Dear [team],

It is with great pleasure that I announce [new leader]'s future role with our team. [new leader] will be responsible for [provide description of the role].

[new leader] comes to Baptist Health from [former company name] where he/she [provide a two to three sentence description of the new leader relevant work history].

[new leader]'s first day is [date]. We are excited and very fortunate to have [him/her] join our team. Please join me in welcoming [new leader]. I encourage you to connect with [new employee] to welcome [him/her] to the team and to share your knowledge regarding our organization and department. [Encourage colleagues to play a role in integrating the new leader to the organization].

## 3. Onboarding Mentorship for New Leaders

An onboarding mentor is an experienced and caring leader who voluntarily functions as a role model, peer-resource, guide and coach to a new leader. "Mentoring" is a collegial relationship where the mentor provides support, shares information, and guides the new leader through his/her orientation process. Mentoring takes place across departments and is outside of the manager/subordinate relationship.

Successful assimilation into a new work culture is facilitated by the provision of positive relationships with mentors and a supportive environment in which to develop and practice a range of skills. Supporting the new leader as he/she takes on his/her leadership role will be a mutually challenging and enriching experience for both Mentor and Mentee.

### Benefits of Mentoring

Mentoring is an effective way to pass on the norms and culture of the organization (i.e., core values, service excellence essentials, and service standards and behaviors). The Mentor strengthens the new leader's onboarding process through social and collegial support as a professional peer and coach.

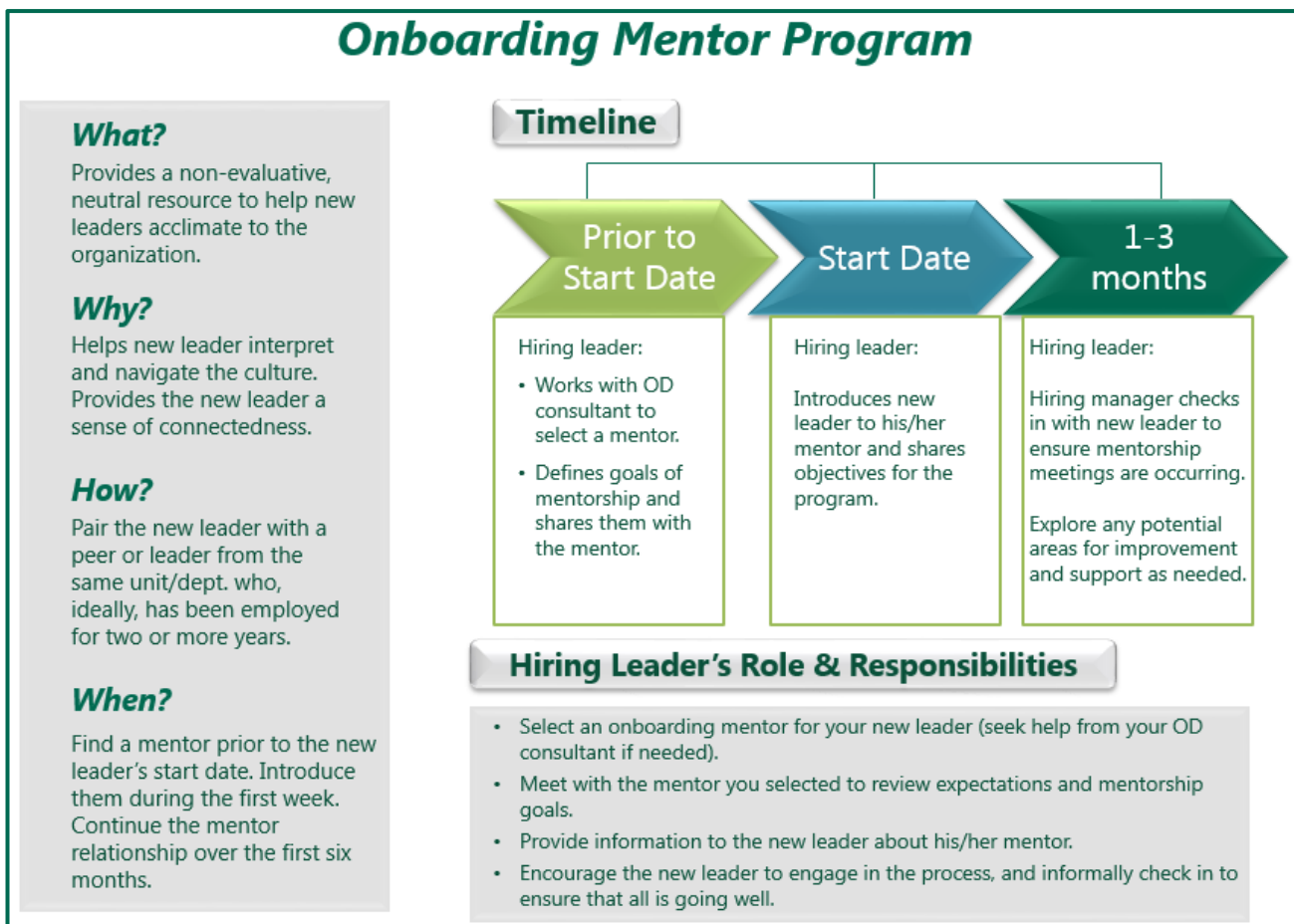
Benefits for the new leader include:

- Assimilation into work culture and networks
- Collegial support in the form of a professional colleague
- Information to workplace support services and resources
- Increased overall job satisfaction, productivity and self-confidence as a new Baptist Health leader

Benefits for the Mentor include:

- An opportunity to assist a fellow colleague
- New learnings, insights and perspectives provided by mentees
- Organizational recognition as a leader

If you would like a peer mentor as part of your new leader’s onboarding process, please contact your Organization Development Consultant for support. See below a graphic summarizing our mentorship program.



## 4. Review Resources for Leaders

Review with your new leader information about all the tools and resources leaders have available to manage and lead their team. Visit the Leader Essentials portal at: <https://leaderessentials.baptisthealth.net/>



## 5. Review LEM Goals no later than 30 days with your new leader

<p><b>Share: Video Tutorial – How to set LEM goals in PeopleSoft</b></p>	<ul style="list-style-type: none"> <li>• <a href="#">Goal Setting Process for Leaders</a></li> </ul>
<p><b>Review: LEM PDF Tool that will explain step by step how to create your goals.</b></p>	<ul style="list-style-type: none"> <li>• <a href="#">Goal Setting Guide</a></li> <li>• <a href="#">Leader System Navigation</a></li> </ul>
<p><b>With your new leader:</b></p> <ol style="list-style-type: none"> <li>1. Review and add your business goals with your leader to define the goals you are going to include in your LEM</li> <li>2. Review and add your professional goals using the ten leadership core competencies</li> </ol>	<ul style="list-style-type: none"> <li>• The total weight of business goals total must total 80%. They are related to patient satisfaction, expense management, quality indicators, etc. and decided by the senior leaders in your organization.</li> <li>• Professional goals are normally called “competencies.” The total weight must total 20%.</li> <li>• You will find more information about the leadership competencies <a href="#">here</a>.</li> </ul>

### First 30 Days

The goal of the familiarize phase is to help your new leader understand his/her role and expectations, learn about the organization, and identify key resources and support needed for a successful transition.

#### In this section we will cover:

1. Helping Your Leader Make a Successful Transition
2. Assimilation Process Planning
3. Helping Your Leader Know You and Your Work Styles
4. Understanding Peers

As soon as your leader starts:

- Have an onboarding meet and greet between Hiring Leader, Onboarding Coach (Organizational Development Consultant (ODC)) and HR Site Director
- Provide the briefing folder (refer to page 9) and onboarding guide
- Discuss how to learn system protocols and processes
- Share onboarding process, mentor, coach, roles/responsibilities and HR support
- Clarify expectations
- Engage in timely and accurate communication with key partners
- Devise regular and effective communication processes with peers, superiors, and other partners. This process starts on the first day and improves on an ongoing basis
- Review the performance appraisal process, leader incentive plan, and leadership competency development framework

In the next couple of weeks, your new leader will need to start understanding the organization and how to start building important relationships with you, direct reports, and other key partners. Use the tool in the next page to discuss his/her entry and assimilation into the organization.

# 1. Helping Your Leader Make a Successful Transition

Without doubt, you are the most influential person during the onboarding process. It's your role to work side-by-side with your new leaders until they learn the ropes and establish credibility within the organization. Help them thrive during the critical transition period and your efforts will pay off. Here are seven ways you can help your new leaders make a successful transition:

## 1. Clarify your expectations up front.

- Even the most detailed job descriptions leave something out. You have to put your expectations into words.
- Review expectations point-by-point. Make sure each new leader understands them and are comfortable with them. If not, why hire them?
- Don't assume that a new staff member will know exactly what he/she has been hired to do. They don't! And many are not comfortable asking.

## 2. Don't assume that qualifications equal success.

- Just because new leaders are well-qualified doesn't mean they will easily and quickly take to their new roles.
- Every new leader will have strengths, but also have opportunities for improvement.
- Give positive feedback on strengths, and be on the lookout for opportunities to coach.
- Address a performance concern the first time you see them – don't wait to see if it will happen again.

## 3. Spell out important points about organizational and department goals, culture, and dynamics.

- Never assume a new leader knows the basics. Cover "big picture" topics for Baptist Health such as mission and strategic plans. Emphasize how your department supports the organization's mission.
- Talk about the organizational and departmental culture. How do we all succeed? Culture differs from place to place. Be realistic, but positive and supportive of the department, your internal customers and the organization.

## 4. Help new leaders nurture their network.

- Introduce new leaders to their key internal customers and their expectations. Success on the job hinges on the ability to form a strong network with staff and customers.
- Have a frank discussion about the individuals who will affect a new employee getting their job done.
- Invite new leaders to meetings.

## 5. Be honest about potential pitfalls and past mistakes.

- Learn from the past; make sure the new leader doesn't make the common past mistakes in your department.
- Were there new hires who did not work out well? Tell new leaders what went wrong and why.
- Talk with your new leader about possible obstacles to success (e.g., meeting client needs) and then the strategies to overcome them.

## 6. Hold regular assimilation reviews.

- Common wisdom says the "honeymoon period" lasts about six months; for some it's three months or even a year. Keep in close contact with each new leader in their first year.
- While you may delegate many aspects of onboarding to others, remember that your role is the primary one.

## 7. Make coaching resources available before there is a crisis.

- Don't wait until a new leader is in serious trouble before taking action. Be a coach.
- Know the coaching resources within your group. Who makes a good coach, buddy, preceptor, and mentor? A good coach: Listens to what is being said; helps the person understand why something didn't work as expected; and offers suggestions for improvement.

## 2. Assimilation Process Planning

Use this template with your new leader as you both begin to explore his/her new role.

<b>Objective: Define What You Need to Know</b>	
<b>Things to Consider</b>	
• Explain the business and our mission. How do we balance mission and profitability?	
• Communicate the expectations and performance goals of the new leader's role	
• Explain opportunities and challenges	
• Explain strategy – where we have been, present state and where we are headed	
• Explain how the work of the team fits into the larger whole	
• Explain the care delivery model. What do patients and customers care about?	
• Explain how people are measured and rewarded	
<b>Process: What the New Leader Needs to Do</b>	
<b>Things to Consider</b>	
• How your leader can spend time learning the business and meeting internal people	
• How your leader can build relationships with direct reports, peers and leader	
• Shadowing department team to understand the needs of internal and external clients, patients, etc.	
• Becoming proficient in the computer systems and protocol	
• Discuss mentorship needs with your hiring leader and OD consultant	
<b>People: Key Contacts and Areas of Expertise</b>	
<b>Things to Consider</b>	
• Identify and know your new leader's key partners	
• Understand key partners' long and short term goals	
• Describe how other groups interact with your function	
• Describe current perception of how your group currently performs, what is going well and what can be done to enhance effectiveness	

### 3. Help Your New Leader Know You and Your Work Styles

Right from the start you need to build a relationship with your leader. If you do not, you put your leader at risk of failure. That is because you will have more impact than anyone else on how quickly your leader delivers results and creates value. You:

- Set benchmarks
- Interpret your new leader’s actions for other key players in the organization
- Control access to resources your new leader needs

To be successful, your leader will need to proactively engage with you to:

- Reach consensus on your business situation
- Establish realistic expectations
- Secure enough resources

*Below you will find a tool provided to your new leader for him/her to get to know you better and learn how to work with you more effectively. Take time to reflect on the following questions before you meet with your new leader:*

#### Understand the Questions Your New Leader Will Ask You

<p><b>1. Your New Leader’s Situation:</b></p> <ul style="list-style-type: none"> <li>• How do you define the business situation?</li> <li>• What makes your new leader’s new job challenging?</li> <li>• What are the current “hot issues”? What does your new leader need to watch out for?             <ul style="list-style-type: none"> <li>○ Relationships among team members</li> <li>○ Client histories and experiences with the organization</li> </ul> </li> </ul>	
<p><b>2. Your New Leader’s Expectations:</b></p> <ul style="list-style-type: none"> <li>• What are the priorities?</li> <li>• What are the key business issues that your new leader needs to focus on?</li> <li>• What do you need your new leader to do in the short and medium term?</li> <li>• Do your expectations seem unrealistic? If so, how can your new leader work with you to reset them?</li> <li>• What are the performance expectations and deliverables for your new leader and his/her team?</li> <li>• Review LEM/LIM</li> </ul>	
<p><b>3. Resources:</b></p> <ul style="list-style-type: none"> <li>• What funding, personnel, equipment, support from you, and other resources will your new leader need to succeed?</li> </ul>	



<b>4. Work Styles:</b> <ul style="list-style-type: none"> <li>• How do you prefer to communicate? Regular meetings, written, e-mail report? How often?</li> <li>• What kind of decisions do you want to be consulted on?</li> <li>• If your styles differ, how will you interact?</li> <li>• How are decisions made? What is the decision framework?</li> <li>• What types of decisions require approval, consulting or advising, and/or are subject to veto?</li> </ul>	
<b>5. Your New Leader's Progress:</b> <ul style="list-style-type: none"> <li>• In what respect is your new leader doing well?</li> <li>• In what areas does your new leader need to improve or do things differently?</li> <li>• What projects or special assignments could your new leader take on to develop relevant skills?</li> </ul>	

### Responsibility Mapping

Responsibility mapping ensures that you and your leader are aligned on the types of decisions that your leader can make individually and those that will require input from others in the organization. Through responsibility mapping, ambiguity is minimized and there are clear expectations for both you and your new leader on authority and actions that can be taken.

Have your leader create a map or table that identifies different kinds of responsibility and authority for his/her position at Baptist Health. To get started, your leader will need to:

- Interview you.
- Consult with peers and direct reports about actual performance of responsibilities and use of authority.
- Clarify responsibilities and authority for realistic practice.
- Create a three-column table that tracks the understanding of the scope of responsibility of the new role. Below is an example of a responsibility and authority matrix your leader will be completing:

### Responsibility Matrix Table

<i>Sole Responsibility</i>	<i>Shared Responsibility</i>	<i>Responsibility Elsewhere</i>
I can decide on my own and I have the authority to do so.	It's my decision, but others have to be included to make it; or this is a joint decision, but I have authority to veto.	I need a decision from someone else and my authority is limited to implementation.

## 4. Understanding Peers

Your new leader's peers can have a great impact on the success of your leader's transition. Their daily interactions create opportunities to accelerate your leader's success by providing support, collaboration, and guidance. To leverage these opportunities and effectively forge new relationships, your leader must understand the current peer dynamics.

Peer Diagnosis is a process that helps one assess and understand the dynamics of peers who report to the same leader. It is important that you provide your new leader with guidance to perform this analysis to ease the transition process into the new role.

This tool is intended to provide your new leader with a better understanding of the team and individual dynamics with his/her peers who report to you as well. In most circumstances, it will be important that this group of individuals functions well together as a team, and not simply as high performing individuals with their own respective agendas. *Your leader should observe and ask you about the following:*

<ul style="list-style-type: none"><li>• What are the working relationships within the peer-management team (that is, the other leaders who report to you and work with your new leader?)</li></ul>	
<ul style="list-style-type: none"><li>• What issues exist?</li></ul>	

## First 60 Days

The goal of the Launch phase is to help your new leader expand his/her relationship network with key people, build his/her team and understand the Baptist Health culture. Your new leader's first 60 days are crucial as he/she will begin assessing and forming his/her team and understand their capabilities.

**In this section we will cover:**

1. Assessing Onboarding Progress
2. Building the Team

### 1. Assessing Onboarding Progress

Time invested upfront in planning onboarding activities will develop your new leader faster. The plan should be consistent and able to be reproduced for all new leaders. Remember to mix strategies – use observations, presentations, demonstrations, practice – and be flexible enough to be able to meet individual needs. New leaders may move through the process at different speeds and in different ways. Document the process while it's happening and evaluate the effectiveness of onboarding after.

#### NEW LEADER CHECK-IN INTERVIEW

**Purpose:** This tool provides hiring leaders with questions to initiate a productive and meaningful discussion with new leaders. These discussions will assist in the development of a positive working relationship and it is recommended that this take place within the first 30-60 days.

**Time Required:** 20 minutes

1. Who have you met this week (key partners, direct reports, coach, mentor, etc.)?
2. If you had questions, who was available to answer your questions?
3. What has our team done to make you feel comfortable?
4. What was the best part of your first week/month? What did you find most interesting?
5. What was the most challenging part of your week? How could we have made that challenge easier to manage?
6. Is there anything that you think we should change to help new leaders during their first 30 days?
7. Is there anything that I haven't explained fully (i.e., processes, culture, expectations and goals)?
8. What training and resources have you taken advantage of or need?

## 2. Building the Team

As a new leader, it is important to assess and build his/her team. Your leader will need to:

- Quickly assess the strengths and weaknesses of the team members. This allows your leader to build a more effective team.
- Build the vision collaboratively. Rather than just bringing in your own vision and ideas, the new leader should seek feedback and input from the team, giving them a real stake in the game.

**To build an effective team effectively, your leader will need to:**

- Take stock of existing team members (direct and indirect reports) to decide if changes need to be made. (See **Assessing Your Team Tool** Page 23)
- Align and motivate your team to propel them in desired directions.
- Establish new processes to promote teamwork.

### Assessing the Team: Considerations

Prior to formally assessing the team members and holding individual discussions with each of them, your leader should spend some time observing the work environment. Staff meetings, other meetings throughout the organization, and informal conversations will provide some insights into each of the individuals on the team.

*Help your leader assess his/her team by answering the questions below. Your leader may also review previous performance and talent management information, if available.*

<b>Considerations to Assess Team Members</b>	
<p><b>1. Competence:</b> Does this person have the technical competence and expertise to do the job effectively?</p>	
<p><b>2. Leadership:</b> Does the person exhibit the Baptist Health leadership or employee competencies?</p>	
<p><b>3. Judgment:</b> Does this person exercise good judgment, especially under pressure or when faced with making sacrifices for the greater good?</p>	
<p><b>4. Energy:</b> Does this team member bring the right kind of energy to the job, or is he/she burned out or disengaged?</p>	
<p><b>5. Focus:</b> Is this person capable of setting priorities and sticking to them, or prone to “riding off in all directions?”</p>	

<b>6. Relationships:</b> Does this individual get along with others on the team and support collective decision making, or is he/she difficult to work with?	
<b>7. Trust:</b> Can you trust this person to keep his/her word and follow through on commitments?	

### Team Assimilation Meeting (Upon Request with your OD Consultant)

Consider doing a team assimilation meeting. The purpose of a Team Assimilation meeting is to make a conscious effort to avoid the all-too-human elements that threaten the development of a trusting team and limit the potential for leaders to display their talents. It is a simple learning model that is efficient, engaging, and meaningful for any team with a new leader.

The Team Assimilation should be conducted between **30 and 60 days for maximum impact**. The session will be facilitated by the onboarding coach and will be attended by the new leader and his/her direct reports.

#### The goal of this session is to:

1. Shape team development
2. Surface culture and expectations
3. Gain agreement on team norms and processes
4. Plan for effective action on team objectives

#### During the session, your new leader can expect to cover the following areas:

- **Provide Direction** – Providing structure starts with defining a direction and setting clear boundaries.
- **Setting Clear Boundaries** - Requires defining what is within the scope of work and what is not, what appropriate behavior is and what it is not, and what productive work is and what it is not.
- **Clarify Roles** – Take a second look at job descriptions and job duties (if necessary).
- **Set Motivating Goals** - It is important to get goals right. When goals support key initiatives and are aligned with the department or organization’s strategic goals, they have a lot of power to direct work almost effortlessly.
- **Give and Receive Feedback** - A conversation that includes two-way feedback is one of the best ways to ensure continued improvement, upward progress, and ultimately, better performance. Additionally, an honest conversation where you seek and accept feedback without defensiveness or excuses builds trust and your relationship with your team.

### 90 Days and beyond:

The goal of the Deliver phase is to ensure that your new leader understands the strategic priorities of securing early wins, learns to manage and balance him/herself through the transition and that he/she builds alliances with key people that will help support the execution of his/her action plans.

#### In this section we will cover:

1. Securing Early Wins
2. Delivering Results

### 1. Securing Early Wins

Help your leader identify and seize opportunities to quickly build personal credibility, create value for the organization, and generate business results. How your leader scores early successes matters just as much as what those successes are. The following tips can help your new leader secure early wins the right way:

***Focus on the most promising opportunities.***

Trying for too many successes can diffuse your new leader's energy and resources.

***Identify what will build momentum best in each part of your new leader's business situation.***

For example in a turnaround situation, rapid, decisive judgment calls on a pressing business issue may be the best.

***Get wins that matter to you.***

You will boost the odds of gaining access to resources your new leader needs.

***Take culture into account.***

For example, in an organization with a strong team-oriented culture, individual pursuit of glory might be viewed as grandstanding. Leading a team in development of a new idea might be a better idea.

***Avoid using manipulative or underhanded tactics to win.***

Your new leader will only undermine his/her credibility.

## Help Your Leader Map the Influence Landscape

As your new leader reflects on his/her progress and how to build influencing skills, collaboratively use these questions:

1. Identify an early-win initiative you'd like to implement.

2. On a piece of paper, list the members of your leader's winning alliance—the people who have the power to support the initiative.

3. Include members of any blocking alliances—people who have the power to say no to your initiative.

4. Also list members of power coalitions—people who cooperate together to pursue particular long-term goals or protect particular established privileges, and who have agendas to which you could link yours.

5. Finally, list opinion leaders in your organization's influence networks—people who influence others through lots of informal sources of power, such as expertise, control of information, connections to other influential people, access to resources, or personal charisma.

## 2. Delivering Results

Leadership is ultimately about leverage. Effective leaders leverage themselves—their ideas, energy, relationships, and influence to create new patterns in their organizations. The underlying goal of the strategies your leader has learned about—whether securing early wins, creating alliances, or building the team—is to build momentum and thus increase his/her leverage.

### Drive for Results

This tool will provide you and your leader with the steps needed to deliver results:

<p><b>1. Action Planning</b></p> <ul style="list-style-type: none"> <li>• What action plans do your leader and his/her team need to create to deliver on identified critical priorities?</li> </ul>	
<p><b>2. Credibility</b></p> <ul style="list-style-type: none"> <li>• How has your leader established him/herself as an expert in the field?</li> <li>• Where has he/she built coalitions?</li> <li>• Where does he/she still need to build alliances?</li> </ul>	
<p><b>1. Building Trust</b></p> <ul style="list-style-type: none"> <li>• Has your leader established trust with all key partners: peers, direct reports, leader, others?</li> <li>• What else could your leader do to continue to build trust?</li> </ul>	
<p><b>2. Have a Plan</b></p> <ul style="list-style-type: none"> <li>• What roadmap does your leader have to inspire the team to take action?</li> </ul>	
<p><b>3. Success</b></p> <ul style="list-style-type: none"> <li>• What critical milestones will lead to early wins?</li> <li>• What can your leader do to celebrate victories, even the small ones?</li> </ul>	



## *Final Note*

***“The task of leadership is not to put greatness into people, but to elicit it, for the greatness is there already.”***

*John Buchan, Scottish Novelist and Historian*

## REFERENCES

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- Dotlitch, David, Noel, James and Walker, Norman, Leadership Passages, Jossey-Bass, 2004.
- Gabarro, John, The Dynamics of Taking Charge, Harvard Business School Press, 1987.
- Watkins, Michael, The First 90 Days, Harvard Business Review Press, 2013.

# Appendix

## Baptist Health Leader Tools and Resources

<https://leaderessentials.baptisthealth.net/>



### Hiring

- Getting Ready to Hire
- Evidence-Based Selection

### Onboarding

- Employee Onboarding
- Leader Onboarding

### Compensation & Benefits

- Understanding Compensation
- Additional Benefits
- Leave of Absence

### HR Processes, Policies & Tools

- HR Policies
- Employee Relations
- Employee Health
- Termination

### Financial & Compliance

- Kronos & Payroll
- PeopleSoft
- Budget
- Risk Management

### Employee Performance & LEM

- Leader Evaluation Manager (LEM)
- Prepare & Conduct Performance Reviews for Employees

### Development & Retention

- Employee Competencies
- Leader Competencies
- Employee Career Development
- Talent Management for Leaders

### Leadership & Management

- Leadership Development
- Leadership Skills
- Management Skills
- Leader's Edge Archive

### Engagement

- Employee Engagement
- Measuring Engagement (Press Ganey)
- NEW Employee Engagement Toolkits for Leaders

Did we miss something? [Let us know!](#)

# New Leader Onboarding

## Hiring Manager Activity Checklist

This checklist provides a list of items, topics for review and resources new leaders may need. The new leader and hiring manager (or assignee) are to schedule these discussions and activities in advance to ensure completion during the first year of employment.

New Leader's Name: \_\_\_\_\_ Start Date: \_\_\_\_\_

PHASE 1: PREPARE (Before 1 <sup>st</sup> Day)		
Hiring Leader's Pre-boarding Activities before New Leader Starts	Date Scheduled	Done √
• Order business cards, if applicable		
• Order welcome gift, if applicable		
• After acceptance, call new leader to welcome him/her		
• Prepare onboarding plan and briefing folder (Contact ODC for support)		
• Designate office space and furniture and order needed supplies		
• Contact Telecommunications to assign telephone/number		
• Arrange for computer and installation		
• Request access to relevant IT applications (Outlook, Kronos, MSS, e-compass, Budget, T-System, Net Access, etc.)		
• Send email to security to request parking and building access		
• Complete cellular phone allowance form, if applicable		
• Order uniforms, if applicable		
• Assign an Ascom Phone (if applicable)		
• Send email announcement of new leader to the department and other relevant individuals		
• Update organizational chart		

## PHASE 2: FAMILIARIZE (First 30 Days)

Orientation with Hiring Leader: Organizational & Entity Orientation	Date Scheduled	Done √
<ul style="list-style-type: none"> <li>Review onboarding plan with your new leader</li> </ul>		
<ul style="list-style-type: none"> <li>Review:                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Briefing folder with key information about Baptist Health such as system-wide and entity-specific strategic plan, FY goals and objectives, scope of services, organizational chart, key measures</li> <li><input type="checkbox"/> List of direct reports, partners and key contacts</li> <li><input type="checkbox"/> Training information</li> <li><input type="checkbox"/> List of recurring meetings</li> <li><input type="checkbox"/> Maps and building information</li> <li><input type="checkbox"/> Calendar with major tasks for the first 30 days</li> </ul> </li> </ul>		
<ul style="list-style-type: none"> <li>Conduct an entity tour</li> </ul>		
<ul style="list-style-type: none"> <li>Schedule meetings with key partners such as:                             <ul style="list-style-type: none"> <li><input type="checkbox"/> Leaders</li> <li><input type="checkbox"/> Mentor</li> <li><input type="checkbox"/> HR Director</li> <li><input type="checkbox"/> OD Consultant</li> <li><input type="checkbox"/> Peers</li> <li><input type="checkbox"/> Direct reports</li> <li><input type="checkbox"/> Leaders who will conduct 60- and 90-day interviews</li> </ul> </li> </ul>		
Orientation with Hiring Leader: Department Orientation	Date Scheduled	Done √
<ul style="list-style-type: none"> <li>Have a welcome breakfast or lunch with new hire and the team (department)</li> </ul>		
<ul style="list-style-type: none"> <li>Complete department orientation checklist</li> </ul>		
<ul style="list-style-type: none"> <li>Review Departmental policies and procedures</li> </ul>		
<ul style="list-style-type: none"> <li>Review department safety plan</li> </ul>		
<ul style="list-style-type: none"> <li>Assign Preceptor/Clinical Educator for additional department shadowing/training (if applicable)</li> </ul>		
<ul style="list-style-type: none"> <li>Review department's roles and job descriptions</li> </ul>		
<ul style="list-style-type: none"> <li>Review evaluation process and employee competencies</li> </ul>		
<ul style="list-style-type: none"> <li>Collect emergency contact information</li> </ul>		
<ul style="list-style-type: none"> <li>Review staffing and scheduling process</li> </ul>		
<ul style="list-style-type: none"> <li>Discuss PPE locations and expectations of use and safety</li> </ul>		

<ul style="list-style-type: none"> <li>Validate IT access and confirm departmental system access</li> </ul>		
<ul style="list-style-type: none"> <li>Confirm badge access</li> </ul>		
<b>Orientation with Hiring Leader: Job Orientation</b>	<b>Date Scheduled</b>	<b>Done √</b>
<ul style="list-style-type: none"> <li>Discuss your expectations and work style (refer to p.16 in your onboarding guide)</li> </ul>		
<ul style="list-style-type: none"> <li>Review current department goals</li> </ul>		
<ul style="list-style-type: none"> <li>Review LEM and LIM</li> </ul>		
<ul style="list-style-type: none"> <li>Review/discuss new leader's job description</li> </ul>		
<ul style="list-style-type: none"> <li>Conduct 30-day retention meeting</li> </ul>		
<b>PHASE 3: LAUNCH (First 60 Days)</b>		
<b>Hiring Leader's activities to help new leader expand relationships and build the team</b>	<b>Date Scheduled</b>	<b>Done √</b>
<ul style="list-style-type: none"> <li>Conduct check-in interview (refer to p. 19 in your guide)</li> </ul>		
<ul style="list-style-type: none"> <li>Discuss new leader's team assessment</li> </ul>		
<ul style="list-style-type: none"> <li>Schedule team assimilation meeting if appropriate (Contact your OD Consultant for support)</li> </ul>		
<ul style="list-style-type: none"> <li>Ensure 60-day retention meeting took place</li> </ul>		
<b>PHASE 4: DELIVER (90 Days and Beyond)</b>		
<b>Hiring Leader's activities to build on momentum and deliver results</b>	<b>Date Scheduled</b>	<b>Done √</b>
<ul style="list-style-type: none"> <li>Conduct check-in interview (refer to p. 19 in your guide)</li> </ul>		
<ul style="list-style-type: none"> <li>Conduct meeting to identify and implement early wins</li> </ul>		
<ul style="list-style-type: none"> <li>Conduct meeting to define action plan to achieve results</li> </ul>		
<ul style="list-style-type: none"> <li>Ensure 90-day retention meeting took place</li> </ul>		