



NEW EMPLOYEE SUCCESS PLAN

Documenting and sharing pre-established goals and success points for the first 90 days will create a foundation for success for your new hire.

Name _____ Today's Date _____

Position _____ Start Date _____

TOP 4 POSITION-SPECIFIC KNOWLEDGE/SKILLS:

1. _____

2. _____

3. _____

4. _____

Use additional pages if there are more than 4 of these to focus on in the first 90 days.

FIRST 30 DAYS

Success looks like... (What will the new employee have learned or done?)

Others or I will help our new employee achieve success by...

FIRST 60 DAYS

Success looks like... (What will the new employee have learned or done?)

Others or I will help our new employee achieve success by...



FIRST 90 DAYS

Success looks like... (What will the new employee have learned or done?)

Others or I will help our new employee achieve success by...

ADDITIONAL GOALS AND TRAINING

Other goals for the new employee include...

Others or I will help our new employee achieve success with these goals by...

Specific training needs or action plans to achieve the goals are...



PRE-HIRE CHECKLIST

The checklist below will guide you through key tasks to complete **prior to the new hire's first day**. This is a valuable list to review in partnership with others such as your HR representative and department administrative manager.

PREPARING FOR THE NEW HIRE:

Administrative:

- Create a transition plan** for the new employee and those currently handling the tasks of the position. Define a timeline for how each task will transition to the new employee, who will be responsible for training, and who will communicate the plan to departments and colleagues across campus. A clear plan will set the expectations for the employee and assist them in being successful.
- Add new employee to Outlook Calendars** in the work group as needed
- Update internal communications**, distribution lists, and email lists with the employee's contact info

Tech:

- Telephone/line** request and long distance capability if required
- Personal computer** set-up. Best to order computer as soon as position is posted.
- Establish computer system and security accounts** needed to perform the job

Workspace:

- Order keys and security codes** if relevant
- Order nameplate, nametag, and/or business cards** if appropriate
- Prepare workspace:** set-up, neat, clean, and organized

Supplies:

- Request procurement card and Travel and Meal Card** if relevant
- Accommodations:** If the employee has requested workplace accommodations, arrange for them in advance, if possible

- Order uniforms** if applicable

Work Assignments:

- Plan initial assignments:** As the supervisor, be sure the new hire has the tools and information to complete their first assignment successfully; this will set the tone for productive supervisory-employee interactions to come.

Staffing:

- Identify "buddy"/someone** in the college/unit to serve as an orientation guide to answers questions and inform person of the responsibility (work with HR)

Welcome Plan:

- Plan a welcoming get-together** appropriate to your work group (i.e. coffee break meet and greet)
- Plan the new hire's first lunch**, including who will participate
- Plan your schedule** so on the new hire's first day you can spend time with them at the beginning of the day and the end of the day

Communications:

- Call the employee** a day or two before arrival to answer immediate questions and invite them to call with new questions
- Send out an announcement** to welcome new hire into the organization, briefly describe their role in the organization (see appendix for sample)

Other:

- _____
- _____
- _____
- _____



FIRST DAY CHECKLIST

The following checklist contains key tasks to help with your employee’s first day acclimation. You may want to ask others on your team to help with some of these responsibilities.

Introductions

- Greet the employee**, show them their workspace/office, and where to put personal belongings.
- Introduce them to others** in the department/work area including their assigned “buddy”.
- Lunch:** If planned, have lunch with scheduled participants; if not, make sure new employee knows where they can go for lunch and what others generally do for lunch.

Workplace Orientation

- Confirm workspace is ready:** Ensure they have all the equipment and tools needed to do their job.
- Give a tour of the office and building**, point out key locations (copier, mailroom, fax machine, office supplies, restrooms, break areas, emergency exits, fire extinguishers, vending machines, Human Resources office, etc.).
- Provide them with facility information** such as keys and security codes.
- Provide an orientation to computer systems;** include log-on, email, security, and calendaring.
- Review phones & copiers:** phone system and usage, fax, scanning, and copying procedures.
- Review office procedures** and guidelines (time away from work reporting requirements, personal phone calls, lunch breaks, office coverage, etc.).
- If there is a dress code**, review it with the employee. If the position requires a uniform, make sure they have the right sizes, etc.

Administrative Onboarding

- University Onboarding:** Ensure they have an appointment scheduled and a way to get to the East Hill Office Building, 395 Pine Tree Road, if they have not already attended in advance of their first day.
- Complete additional forms** specific to the department or position, (i.e. confidentiality agreements.)
- Required training:** Schedule any Right-to-Know or other required training as needed.

Other:

- _____
- _____
- _____

Once these items are completed, move on to the next set of recommended activities for the first weeks and first 90 days.



FIRST FEW WEEKS CHECKLIST

WORKPLACE-RELATED INFORMATION:

Functions

- Supplies:** Provide information and instructions on office supplies and equipment.
- Safety:** Provide safety and emergency information and share how to report hazards where applicable.
- Finances:** Provide budget, finance, purchasing procedures if needed, including policies and rules for use and information on training.
- Meetings & Events:** Provide information about meetings and other events on the employee’s calendar (purpose, attendees, what to expect, the employee’s role); debrief with employee following these experiences to answer questions and provide additional information.

Culture

- Share unwritten rules, nuances, and traditions** with employee (such as how to address faculty, jeans on Friday, birthday celebrations, etc.)
- Culture:** Discuss your management style and the organization’s culture.
- Consider developing a glossary** of terms and acronyms as a reference guide.

Role

- Set up for success:** Assign the employee something they can accomplish relatively quickly and easily to help build an initial sense of contribution and success.
- Set priorities.** Discuss what is important to overall objectives. This will help the new employee prioritize tasks since they are new to the organization.
- Introduce the employee to partners** external to the college/unit who will work with them on projects or tasks.

Policies

- Review Policy 6.9, Time Away from Work,** share unit process for requesting time off.

- Explain confidentiality** in the workplace, what can and can’t be shared, and how confidential documents are stored.
- HR Policies:** Provide information and time for the new employee to review HR policies, HR philosophy, Campus Code of Conduct, Computer Rights and Responsibilities, Open Doors, Open Hearts, Open Minds Statement on Diversity and Inclusion, Respect at Cornell.
- University Policies:** Review University policies such as Policy 4.14, Conflict of Interest and Commitment, Policy 4.6, Standards of Ethical Conduct, Data Stewardship and Custodianship, Policy 6.4, Prohibited Bias. Show where policy info is located and answer questions.

CAREER-RELATED INFORMATION:

Career Development

- Expectations:** Determine mutual performance standards by reviewing position responsibilities, setting performance expectations, success measures, and clarify the new employee understands expectations. Review Skills for Success and print poster.
- Training:** Identify training resources and opportunities for the employee and set a realistic plan of action.
- Professional Development:** Introduce the employee to resources such as the professional development workshops and educational benefits.

Connect With Big Picture

- Organization and university mission:** Review your organizational chart and explain how the individual’s work connects to Cornell’s mission of education, research and outreach. The broader pictures will help link their efforts to larger goals and avoid looking at a single set of tasks.

Other:

- _____
- _____
- _____
- _____



FIRST 90 DAYS CHECKLIST

- Provide regular feedback** during the first 90 days and beyond.
- Non-Exempt & Bargaining Unit Staff:** Provide formal feedback for non-exempt and bargaining unit staff at the end of their 90-day probationary period.
- Training:** Review and direct the employee to training opportunities.
- Flex Options:** If applicable to the position and department's needs, provide guidance on identifying appropriate flexible work options to assist the employee's effectiveness and efficiency.
- Foster Belonging:** Check if the employee is fully engaged and sees themselves as a valued contributor.
See questions below for prompts to help facilitate this conversation.

QUESTIONS TO ASK DURING NEW HIRE CHECK-IN MEETINGS

- How is your job going?
- Is it what you expected when hired?
- Any surprises? If yes, what...
- Has the training been helpful?
- What training would you add?
- Has your buddy been helpful?
- Any changes you would suggest for the buddy program?
- Do you have all the work tools/resources you need?
- Do you know where you stand in terms of your progress since you started work?
- How are your relationships with your co-workers?
- Is there room for improvement in the department?
- Are you making connections in the local community (for new hires who have relocated)?
- Are you aware of the resources available to support your family members' adjustment (for new hires who have relocated with families – refer to Cornell Work/Life)?
- Do you feel you have been able to manage your work/life needs since starting this job?
- Was your Onboarding appointment helpful? Is everything OK with your benefits and pay?
- Any questions/anything unclear?