WHY ONBOARDING MATTERS

Effective onboarding is essential to helping new employees integrate successfully into WSU's culture. When done well, onboarding delivers significant benefits:

- Higher job satisfaction
- Improved performance
- Lower turnover rates
- Reduced stress
- Stronger commitment to the organization

SOCIALIZATION IN ONBOARDING

Successful onboarding goes beyond paperwork and training sessions. It is also about socialization which helps new employees understand their role and build meaningful connections. Socialization occurs in multiple stages and is critical to a new employee's early success and long-term engagement. One proven approach is the 4 C's of Onboarding, which provides a strong foundation for integrating new employees into your team and workplace culture.

The 4 C's of Onboarding:

- ☑ **Compliance:** Teaching policies, legal requirements, and organizational rules.
- 🔍 **Clarification:** Ensuring clear understanding of job duties, expectations, and performance goals.
- 🏫 **Culture:** Introducing new employees to the organization's values, norms, traditions, and the overall work environment and helping them feel part of the bigger picture.
- 🤝 **Connection:** Fostering relationships with coworkers, managers, and the broader community—building a sense of belonging and support.

ONBOARDING FRAMEWORK

Onboarding begins before an employee's first day. Advance preparation ensures a welcoming, organized experience and supports a smooth, successful transition for your new employee. The following checklist outlines essential steps and resources to help you prepare.

BEFORE DAY 1 ☑ 🔍 🏫 🤝

- ☐ **Organize Your Schedule**
  - As soon as you know the start date, block time on your calendar to connect with your new employee during their first few weeks.
  - Once they are added to Outlook, send calendar invites for regular check-ins.

- ☐ **Complete Tasks in [Workday](#)**
    - If you have been assigned the Workday Manager or MSUAASF Lead security role, you will receive tasks to review offer details and/or initiate the onboarding.
    - The *Onboarding Setup Task* is an opportunity to send a personalized welcome note to the new employee and notify stakeholders (e.g., Department Assistant) within Workday. After you complete this task, Workday assigns onboarding tasks to the new employee.

- ☐ **Announce the New Employee**
    - A template is available for the [New Employee Announcement Email](#).
    - Supervisor may choose to notify the department, college, or entire university.

- ☐ **Update the Department Website**
    - Submit a request through the [Winona State Service Portal](#).
    - Order business cards through the [Winona State Service Portal](#).

- ☐ **Prepare the Workspace**
    - Select a location and order necessary office supplies.
    - Prepare a [Welcome Sign](#) for the new employees' space. Write a welcome message on the sign and encourage others to write a message too.
    - Submit Facilities Services requests if needed:
        - To move furniture, submit a request through the [Winona State Service Portal](#).
        - To update a wall sign or department suite sign, submit a [signage request](#).
        - Attain a [Key Issuance Form](#) from Facilities Services if office keys are needed.
    - Submit technology-related requests to IT. View the [Employee Resources](#) category in the WSU Service Portal that links a variety of ITS forms that are relevant to employees (laptop request, printer orders, etc.).
    - Contact the Technical Support Center to schedule a laptop distribution session or receive desktop setup assistance on the employees' first day.

- ☐ **Prepare the Onboarding Agenda**
    Each area is unique and should develop and maintain its own onboarding agenda. Below are helpful ideas, but not all items will apply to every role. To prevent information overload, plan the timing of each step so new employees receive information gradually.

- ☐ **Request System Access**
    Submit the following requests as needed:
    - ISRS, Knowledge Lake, Salesforce, or a shared mailbox – Submit an [Employee Resources Request](#).
    - Faculty Workload Management (FWM) - Email [Human Resources](#) if edit access is needed based on the new employee's role.

☐ **Submit Assignment Details in FWM (IFO faculty only)**
New faculty appear in FWM after they have responded to the onboarding tasks in Workday.

☐ **Contact the New Employee Before Day 1**
Review their start date/time, department location, parking and work attire information.

DAY 1: CHECK-IN AND WELCOME ☑ 🔍 🏫 🤝

☐ **CELEBRATE!**
You have waited weeks or maybe even months to welcome someone to your team. Celebrate your team's growth. Radiate positivity and those around you will notice!

☐ **Arrival**
- Greet the new employee upon arrival and review the orientation agenda
- Provide the [New Employee Checklist](#) link electronically and/or print them a copy

☐ **Role & Department Review**
- Review department functions
- Review position responsibilities
- If applicable, sign the position description and submit it to HR
- Review time and attendance expectations (department hours, schedules, overtime, leave requests, time reporting, telework, etc.)

☐ **Department Introduction & Tours**
- Introduce team members and key contacts
- Conduct a department tour (workspace, files, supplies, printers, mail, etc.)
- Provide a building tour (departments, restrooms, water fountains, exits, etc.)
- Review department and building access procedures
- Offer a campus tour (Admissions also has a virtual tour you can share: https://blogs.winona.edu/admissions/virtual-campus-tour/)

☐ **Ensure the federally required form I-9 is completed**
- Winona: HR Somsen 114
- Rochester: Student Services SS 128
- Distance: Contact HR for alternative arrangements

☐ **Assist in obtaining a Warrior ID card**
- Winona: Campus Card, Somsen 207
- Rochester: WSU-Rochester IT, RCTC CF 122
- Distance: Email campuscard@winona.edu
- Contact [Jason Nelton](#) in Facilities Services if additional door access needs to be added to the Warrior ID.

☐ **Confirm Technology Access**

New employees attend a laptop distribution session or receive desktop setup assistance scheduled with the Technical Support Center.

☐ **Workspace Setup**
- Set up office/workstation
- Set up email signature
- Set up phone and voicemail
- Bookmark the [Minnesota State Employee Home](#) dashboard for quick access to important employment related links and applications
- Review existing emails

☐ **Review Parking Options**
- [Winona Parking](#)
- [Rochester Parking](#)

☐ **End-of-Day Wrap-Up**

Check-in see how their day went, address questions, and clarify next steps,

WEEKS 1-2: Building Knowledge & Understanding ☑ 🔍 🏫 🤝

☐ **Supervisor Check-Ins**

Demonstrate support and investment in the employee's success by having regular conversations to:
- Clarify responsibilities
- Address questions
- Review schedules and goals
- Adjust onboarding plans
- Share communication expectations (including urgent situations)

☐ **Data Privacy Conversation**

Review what information the employee will access and expectations for protecting sensitive data and following relevant privacy policies and laws.

☐ **Team Integration**

Host a welcome lunch or virtual meet-and-greet

☐ **Job Shadowing**

Schedule opportunities for the new employee to observe workflows and learn key processes.

☐ **WSU Employee Orientation**

HR enrolls new employees in the WSU Orientation course in D2L Brightspace. Ensure 2-2.5 hours of time is given to complete the course. The course covers foundational information about the institution, including:

- WSU history, structure, and leadership
- Identifiers and systems
- Parking options
- Payroll schedule
- Insurance overview
- Paid leave, retirement benefits, tuition programs
- Amenities and campus services
- Required training and institutional policies
- Opportunities for engagement on campus

☐ **Benefits Orientation with HR**

- Newly eligible employees are encouraged to meet with HR for a detailed review of benefits and insurance options specific to the employees' eligibility.
- This orientation takes approximately 30 to 60 minutes.

☐ **Key Contact Introductions**

Schedule brief introductions with campus partners to help the employee understand each department's services. Example list:

- Admissions
- Budget Office
- Business Office
- Campus Safety & Security
- Equity and Inclusive Excellence
- Human Resources
- Print Shop
- TLT
- Warrior Hub
- Warrior Success Center

☐ **Workday Timesheet Submission**

- Assist the new employee in submitting a timesheet.
- Review where to go for help (supervisor, HR).

☐ **Work-Related Injuries Discussion**

- Explain the reporting process: Employees must notify their supervisor immediately.
- Supervisors must submit documentation to HR within 24 hours of any incident.

- ☐ **Headshot**
  - ▪ Schedule a professional headshot with University Marketing & Communications.

- ☐ **Mandatory Training**
  New employees will be assigned to the training courses required and need time allocated to complete them. Training courses may include:
  - ▪ Minnesota State Compliance Training
  - ▪ Position or department specific safety training
  - ▪ Minnesota State Leadership Training

- ☐ **Provide Keys** (Facilities will notify the requester when keys are ready.)

- ☐ **Provide Commonly Used Links** (e.g., ISRS, DARS, D2L, Workday, etc.)

- ☐ **Encourage Utilization of Online Training Resources**
  - ▪ Academic Affairs
    - o [Faculty Workload Management (FWM)](#)
  - ▪ Finance & Human Resources
    - o [Workday](#)
    - o [Workday Timesheet Tips & Tools](#)
  - ▪ [LinkedIn Learning](#) (creative, technical, and business skills)
  - ▪ [Teaching Technology](#) (D2L Brightspace, Kaltura MediaSpace, WeTeach, etc.)
  - ▪ [Google Certifications](#) (cyber security, digital marketing, agile, AI, etc.)

SUPPORTING CONTINUED GROWTH

Check-In! ☑ 🔍 🏫 🤝

Regular check-ins with your new employee are essential to show your investment in their success and ensure they feel supported. These conversations help build confidence, clarify expectations, and develop the skills necessary to succeed in their role.

Suggested Discussion Topics
- ☐ Questions or concerns from the new employee
- ☐ Review of department structure and workflows
- ☐ Updates to the onboarding plan
- ☐ Review of meeting schedules and priorities
- ☐ Goal-setting and performance expectations
- ☐ Preferred methods of recognition and feedback
- ☐ Communication styles and urgent contact procedures

Why Check-Ins Matter:

- They help employees gain confidence, clarity, and competence in their work.
- They provide insight into how well employees are adjusting to WSU's culture, mission, and values.
- Regular engagement is linked to higher job satisfaction, commitment, and overall productivity.
- The ultimate failure of onboarding is when potentially good employees withdraw. Losing an employee who is a poor fit may be a possible outcome, but losing employees because they are confused, feel alienated, or lack confidence indicates inadequate onboarding.

Provide Feedback ☑ 🔍 🏫 🤝

Be clear and consistent about what you expect from your new employee, and how performance is measured so there is no question as to where your new employee should focus their efforts. Ongoing feedback and training will support your new employee in becoming a valued member of our Warrior Community. To increase their level of autonomy, you should:

- Review achievements, performance, training, and challenges.
- Provide feedback.
- Complete a mid-point review *(if applicable)*
- Set goals and performance expectations for the next three to six months

YEAR 1 COMPLETION MILESTONE

At this point the new employee should now be fully engaged in their role, applying skills and abilities, making sound decisions, contributing to team goals, understanding how their assignments affect others in the organization, and developing effective working relationships. They should have a strong understanding of the university's mission and culture. At this point, they will have gained greater confidence in their position and should have begun taking on more complex assignments. To increase their level of autonomy, you should:

- Review their achievements, performance, training, and challenges.
- Continue providing formal and informal feedback.
- Obtain feedback from the employee and team
- Complete their Annual Performance Appraisal *(if applicable)*