**On-Boarding Program (OBP)**

**Worksheet**

The first step towards creating a successful On Boarding Program is to understand who will “own” the program. Ideally, it should be the *sales**leader* with support provided by Human Resources and other applicable departments.

When evaluating your current On Boarding program, ask yourself the following questions.

1. Is your company’s strategy, mission, and philosophy clearly communicated throughout your OBP? YES/NO
2. Do you currently have a *written*, *detailed* plan for onboarding new employees (30, 60, 90 days)? YES/NO Is it *specific* to EACH employee based on your interview and assessment process (i.e. evaluate current experience, soft, and hard skills.) YES/NO
3. Does your OBP involve various departments of your organization such as Corporate Leadership, HR, Marketing, Product Management, Technology, etc? YES/NO If No, who else needs to be involved? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. What training tools do you use for your OBP?
	* Mentoring program
	* Peer/job shadowing (1:1)
	* Manager/Employee coaching & check-ins
	* Online learning
	* Manuals/company & product literature
	* Internal group training (company, sales, product training, etc.)
	* External training (sales, technology, professional development)
	* Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	* Which tools are most effective? Which tools would you like to add? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
5. Is there an assigned budget for OBP dollars? YES/NO If No, then who needs to be involved in assigning this new budget? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
6. Turnover:
	* What is the turnover rate for your sales team? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	* How does this compare to the industry and your competitors? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	* Do you perform exit interviews? YES/NO If yes, what feedback have you received? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
7. Have you surveyed your current sales team for feedback on your OBP? Ask questions from the existing sales team, support teams, and leadership. Talk with your business partners that do recruiting, consulting, or sales training for you. What is working? Where are there gaps in training? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

It is also essential that each step in the employee management process is *aligned* with each other. So, also ask yourself the below questions.

Job Description

Job Description

1. Does each position have a detailed job design (description) that includes *specific competencies* and *behaviors* needed for success? Does it include *measurable outcomes*? YES/NO Is the job design aligned with the OBP?
2. Does your company/hiring manager have the experience, knowledge, and resources necessary to recruit A players to your organization? Do your hiring managers have the interviewing skills necessary to uncover whether a candidate has the correct competencies and behaviors required for the given role? YES/NO
3. Is your OBP aligned with your ongoing training process (post 90 days)? YES/NO
4. Ultimately, is your job design, On Boarding Program, and On-Going training aligned to your performance review process? YES/NO

Based on the above answers and feedback from your team, list the areas in which you can improve your On Boarding Program. Are there other areas within the employee management process you also need to re-evaluate (i.e. job design/descriptions, interviewing skills, performance reviews, etc.)?

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2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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What are your next steps?

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**Do you need assistance with evaluating any step in the employee management process?**

**Call us at 770-888-0380?**

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