



On-Boarding Conversation Guide

Description

The first meeting with a new employee sets the foundation for his/her success and increases the change of a successful on-boarding.

The outcomes for this conversation are:

1. Identify skills, knowledge and talents
2. Build a working relationship
3. Set goals and expectations

Instructions

Apply the suggested agenda. Modify the design to suit your style and to include anything that is required by your organization.

There are several pools of questions included for you to draw upon in preparation for the meeting.

Suggested Agenda On-Boarding Conversation with New Employee

Topic	Time	Notes
Welcome	5 min	<ul style="list-style-type: none">• Express why you are glad this person is on your team.
Purpose/Agenda	5-10 min	<ul style="list-style-type: none">• Explain the outcomes and the key topics for the meeting. This first conversation is for information gathering and relationship building.• Ask what they want to add to the agenda.
Design Relationship	15-20 min	<ul style="list-style-type: none">• Explore questions from Designing Relationships questions Explore questions from the Identifying Strengths questions.• Set expectations.• Agree to confidentiality and no-fault termination.
Foundation Work	15-20 min	<ul style="list-style-type: none">• Draw questions from Talents Discovery questions. Listen for values and share what is important to you.• Make any modifications to the job assignment or support structure to maximize success.
Goals/Action	10-15 min	<ul style="list-style-type: none">• Determine primary areas of focus for both job requirements and for the person's development.• Set-up a communication timeline for follow-up.



Building the Working Relationship Questions

Category	Question
Relationship	<ul style="list-style-type: none"> • What would make you feel supported? • What do you need most? • What do you need from me in order to make this relationship successful? • What do you need from me to be successful? • How can we best work together? • What do you feel are the most important aspects of a solid relationship? • Where might we get off track? What is it that we can do to get back on track? • How can we work together most effectively?
Handling the Rough Spots	<ul style="list-style-type: none"> • What do I need to watch out for? • When you get stuck, what moves you forward? • When you feel like holding back, what can I do to encourage you? • What tips can you give me about how to best mentor you in challenging situations? • How does your resistance show up? • What advice would you give me about working through a conflict with you? • How would I know when you are avoiding something? • How would you like me to give you feedback?
Knowing the Person	<ul style="list-style-type: none"> • How do you like to be recognized? • What motivates you? • What are you committed to? • What is important to you? • What inspires you? • How do you learn? • What does success look like for you?
Identify the Individual's Strengths	<ul style="list-style-type: none"> • What do you enjoy most about your work experience? • What do you think your strengths are, (skills, knowledge, and talent)? • What about your weaknesses? • What are your goals for your current role? (Get timelines.) • How often do you want to meet with me to discuss your progress? • Are you the kind of person who will tell me what is going on, or will I have to ask? • Do you have any personal goals or commitments you would like to tell me about? • What is the best praise you have ever received? What made it so good? • Have you had any really productive relationships or mentors in the past? What about these relationships worked so well for you? • What are your future career goals? • Are there any particular skills you want to learn? • Are there some specific challenges you want to address? How can I help? • Is there anything else you want to talk about that might help us work well together?
Talents Discovery Questions	<ul style="list-style-type: none"> • How would you describe success in your past roles? How did you measure it? • What do you actually do that makes you as good as you are? What does this tell you about your skills, knowledge, and talents? • Which part of your past roles did you enjoy the most? Why? • Which part of your past roles did you struggle with? What does this tell you about your skills, knowledge, and talent? What can we do to manage around this? Training? Positioning? Support system? Partnering?