Process & Techniques

INFO TO GO

- Use a checklist to make sure you have everything ready before the new team member arrives.

- Compile all necessary documents into one binder that can be given to any new arrivals.

- Be sure to provide some context about the company and the team to help the newbie get acclimated.

Are You Ready?

With a little preparation and teamwork, you can pave the way for a new team member.

BY MICHAEL BOLTON

AS A CONSULTANT, I'M OFTEN BROUGHT INTO NEW SITUATIONS—COMPANIES OR departments that are unfamiliar to me. Since my job is to explain to companies how to be more productive, and since my services are being paid for, I like to be self-sufficient and effective from the moment I arrive. Generally, the company has a reasonable idea of why they've hired me, and someone has explained to me the problem that they're trying to solve. Often that problem relates to productivity. However, it can sometimes take days or even weeks before *I* can be productive, because the organization isn't quite ready to handle new arrivals.

If your company is typical, it is hiring more and more temporary workers while scrambling for every bit of efficiency and value. Hiring a contractor to help with temporary problems can be cost-effective, but wasting his or her time undermines the purpose of the exercise and costs hundreds of dollars per day. Moreover, people simply don't work as well when they feel uninformed, frustrated, or stymied. On the other hand, a contractor who can hit the ground running will make better relationships, will be more effective, and will use your time and hers productively.

This article describes ways to prepare for a new contractor; however, the tips here could just as easily be applied to a temporary employee, a new permanent employee, or in some cases, a transfer into your department. I don't assume any particular job description or title for the person, nor do I assume anything about the person's technical skill in any given category. Neither should *you* make such assumptions. A crackerjack developer may be completely oblivious to network configuration issues—especially in a new environment—and a brilliant documentation writer might be flummoxed by a cryptic voice-mail system. Your contractor's time is best used to solve the problem for which you're hiring her, not her own infrastructural or contractual issues.

Contracts and Administrivia

Before beginning work, your contractor will typically sign a contract outlining the scope of the work to be done, the deliverables expected, and a schedule detailing when each element of the work should be completed. The more specific the contract, the less opportunity there is for miscommunication and disagreement, and the better your interests are protected. Your contractor may have requirements that are outside the scope of your company's standard contract, or she may have to provide certain kinds of documents relating to work eligibility. Make sure these kinds of issues are ironed out before the contractor is slated to begin work. Most contracts come with a non-disclosure agreement. Make sure this, too, is prepared in advance, and that all agree on each of its points before the contractor's first day. If your human resources department has a policies and procedures manual appropriate for your hire, make a copy available to the contractor early in the game.

Human resources will typically require various kinds of information from your new hire. Be

> Restrooms with locks but no keys are scourges upon the land. When I started at one small outfit, it was a week before security could produce a restroom key for me. It wasn't only a bother for me to ask my new colleagues for a key—I was interrupting their work, too.
>
> At this company, the restrooms were locked, but the door to the server room was always open.

sure to ask in advance what information they'll need so that you can pass on any questions to the contractor prior to her arrival. Human resources or security will typically supply ID badges, pass cards, access codes, and keys to the office, restrooms, or other secure facilities. These items should be available and tested.

If the contractor is arriving from out of the country, make sure that your human resources department and the contractor have fulfilled all requirements related to visas, work permits, and the like.

The accounting people will need to deal with administrative and taxation

Elizabeth, a European contractor of my acquaintance, was hired to work in an American company. She submitted an invoice, covering salary and expenses, which was rejected on the basis of a couple of questions from the accounting department about her tax withholding status. She dropped in to investigate the problem by speaking with Mark, the accountant who had sent her the mail rejecting the invoice. "I don't have time," said Mark. "Not even for just a couple of questions?" asked Elizabeth. "No," Mark replied. "It would be a different story if you were an employee rather than a contractor. But," he said imperiously, "I have more important strategic things to do." This incident occurred at a company where more than half the staff was made up of contractors.

Eventually the problem was sorted out, but it meant inconvenience and exasperation for Elizabeth and her manager, and embarrassment for Mark's manager. On the other hand, Elizabeth's final report included a subtle recommendation — which Mark's manager followed — to give Mark less strategic work to do. Whether Mark is currently doing strategic work or not, he's doing it somewhere else.

issues. Make their jobs easier by coordinating and relaying the required information in advance, both from your staff and from the contractor. Issues related to eligibility, tax numbers, tax forms, and withholding information should be sorted out concurrently with the contract. There are few things that make a contractor happier than being paid on time and with a minimum of hassle. Ask your accounting department what they'll need from the contractor to pay invoices promptly.

Ensure that expense and reimbursement policies are clear from the get-go. If your company uses a standard expense reconciliation form, make sure that a few copies or an electronic template are available to your contractor. Again, your most friendly and helpful contact person in accounting should be available to the contractor to help sort out confusion or difficulties.

IT Issues

Notify the IT support department that a new hire is on her way, and request the specific things you'll need and the date you'll need them. Most new arrivals will need at least one computer set up, linked to the network, loaded with tools, attached to printers, and tested. If you're hiring a developer or tester, additional terminals or workstations may be necessary. Don't forget to tell the IT department about this, and above all, don't assume that they'll know what the new arrival needs. Your new arrival will need access to various areas of the network, so make sure she has the appropriate set of access rights. If your company's security is very restrictive—for example, limited Internet access—notify your contractor beforehand so that other arrangements can be made for Net-based research tools and resources. An analog line might be required for some purposes. If specific tools—examples include compilers, configuration management programs, and testing utilities—are required, have these loaded and tested on the contractor's machine in advance. Be sure to follow up, verifying that the work has been done and that resources, configuration settings, network policies, and default passwords are documented.

Make sure that email accounts have been set up and checked by sending a message to the new arrival's address, and then check with the IT department to be sure the message has been received in the new mailbox. In addition, obtain

The new arrival can often help people to notice old bumps in the road. I was brought into a test organization to help identify problems in testing efficiency. There were two types of network drops in the test lab — one for the company's internal network and one for the test network. These weren't labeled, since *everyone* who used the lab knew which was which. I suggested that this shouldn't be taken for granted as one of the locals helped me find the right connection, and I used a bit of masking tape to label the drops nearest to my workstation. The next day, a fairly senior tester reported a defect that was later found to be spurious, at a fairly significant waste of time and effort. The misunderstanding happened because he had plugged the test machine into the wrong network connection. The day after that, labels magically appeared on *all* of the network drops.

a document from the IT department on how to change network login and email passwords.

Everyone needs a working telephone and voicemail system. Have the telephone installed, and a number ready for the contractor when she arrives. Make sure that this number is listed in the company directory—and remember that directories can exist on the network, in the voicemail system, and with the receptionist.

Despite everyone's best intentions, a company's information infrastructure can be complex and confusing to a new arrival. Have the IT department provide the name of a specific person—a guide or sponsor who is helpful and knowledgeable about the company—to help the contractor navigate through network access, email configuration, and printer problems. In addition, make sure that your contractor will be able to find her default printer, email address, network login name and password, and IP address. Try to counsel colleagues against sending email announcements saying

things like "This week's build can be found in the usual places." Instead, make the details explicit.

Providing Context

The contractor has been hired to accomplish some task or solve some problem. If people within your company are having difficulty sorting out an issue, imagine the difficulty that a stranger will face! Even people who have worked inside your company and who know the general environment need background information when they arrive in a new position. This is yet another motivating force for your company to develop clear specifications, design documents, plans, schedules, budgets, and so on.

Start by writing a brief description of what the company and your division do, and prepare an organizational chart or departmental roster. At the very least, identify yourself and your direct superiors and reports, along with the other people with whom you expect the contractor will be working. As you're preparing this information, note the people who are most likely to be helpful in answering questions or fixing problems, and provide their contact information, so as to minimize the amount of time that the contractor must wait—unproductively—for answers. Document the key business processes and workflows associated with the new arrival's task at hand. If you provide answers early, there will be less time spent wondering and asking questions.

Don't get hung up on tools or formatting: A document composed using a text editor or even a pen and paper is infinitely superior to a document that doesn't exist at all. When offered a choice between a detailed Notepad file and an empty Gantt chart, I'll pick the former every time. Simply make sure that the information exists, and that it can be found and read easily. Make it a mandate from the beginning, and check with the new arrival often. If the new arrival feels that she is being forced to do detective work, encourage her to keep a log of what she needed to know and what she found. Make sure that one of her deliverables is a list of the things that will be useful to her successor, and be sure to budget time for her to prepare it.

City Guide

If your new arrival is coming in from out of town, she'll feel more welcome with a guide and some idea of where important services can be found. If your company is

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providing accommodations, make sure that the contractor's lodgings are quiet, secure, comfortable, and reliable, and that they're ready for the contractor by the end of the first day of work, at the latest. If arranging accommodations is the contractor's responsibility, provide a list of facilities in a variety of price ranges. While it's nice to be close to work, don't strand the contractor near an industrial park without food or services nearby. Prepare a list of restaurants in the area that cater to a variety of tastes and budgets. Ask your department for recommendations, and you'll quickly have a list that is easily maintained and printed.

One of the benefits of traveling, from the point of view of many contractors, is

At one company where I was a full-timer, we hosted a number of developers during an outsourced project. We created a list of local restaurants and tourist attractions by sending out email to everyone in the department, soliciting one suggestion from each person. I compiled the suggestions into a single document, removed the duplicates, and posted the results to an internal discussion board. A few of the suggestions inspired still more.

Some might suggest that discussion of restaurants on company time and company bulletin boards is wasteful. Our experience was that the one-suggestion technique cost next to no time and was a way of getting to know people — and people who knew each other better almost always worked smarter and harder. We also found that a handy list made it easy to book company gatherings, to provide directions, and so on.

using free time to explore their surroundings. Survey your staff for a number of interesting—and possibly undiscovered—places to visit in the area. If those places are somewhat off the beaten path, ask the person making the recommendation to provide a link to one of the several useful Web-based mapping services. If everyone pitches in a suggestion or two, compiling them into a helpful guide shouldn't be burdensome. When you're finished, you should have a complete package of general information that can be passed to any new employee or visitor on paper, via email, or on an internal Web site. Ask the new arrival frequently for feedback on the checklist, and refine it accordingly.

On the Job

Make sure that you schedule some time on the contractor's first day for introductions and a tour of the essentials. You should be prepared to walk around for at least an hour with the new arrival, introducing her to the people she'll need to know. An introduction from you is likely to carry more significance than one from a subordinate, so be prepared to do this yourself. Even if you are routinely busy, getting your employees and contractors to work together is a tremendously worthwhile investment. A contractor's effectiveness often depends upon being able to meet and connect with other people.

Most contractors meet their new colleagues in business meetings, but more informal circumstances can lead to friendlier relationships. On the introductory tour, take your time. Cover the important places and people, but be relaxed and try to avoid a hard-and-fast agenda. Spend a few moments introducing the new contractor to each staff member. Explain quite generally what the new arrival is there to do, and describe your staff member's role, and how each may be able to help the other. Don't just concentrate on peers and colleagues. Spend a few moments chatting with other useful contacts with whom your new arrival will need to interact—people in network services, reception, the mail room, and accounts payable.

As you're walking around, show the

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The kitchen or lunchroom is not only the place for refueling but also a good place to meet and converse with others. Linger for a while and encourage chatting, even if it's not directly related to the task at hand. Spend a little petty cash on group lunches, outside coffee breaks, or visits to the pub with your contractor and the rest of your staff. If these informal approaches seem of questionable value, consider that productivity and effectiveness are often based on personal relationships and rapport—do what you can to foster them.

new person all of the useful and necessary places around the office. An early stop should be the restroom. If keys or pass cards are required, make sure that the contractor is given them upon her arrival. The IT department should have set up a default printer and informed you which one it is. Include this on the tour, along with specialty printers and other equipment that might be useful. Also on the tour, include visits to the office supply cupboard, the photocopier, the first aid kit, and the lunchroom.

For the duration of the contract, the contractor is a member of your company and your department, and thus should be accorded at least the same kind of assistance and respect given to your permanent employees. If you are the contractor's supervisor, you must be prepared to go to bat for her, and the rest of your organization should be prepared to take the same approach.

No matter what the task, there's nothing worse than having to research and answer the same questions over and over again. Keep a list of frequently asked questions, their answers, and where someone can go for more information. In many cases the FAQ information can be posted on an internal Web site, captured in a database within workgroup software, or collected in a piece of email. If you don't have such things set up, consider making the collection of FAQs a task for the contractor, making such a document part of the contractor's package of deliverables, since your contractor will have plenty of insight on what's important for a new arrival to know.

Reuse and Recycle

All this might sound like a lot of work—and the first time you do it, it will be. Luckily, the processes and documents that you prepare for the arrival of one contractor will be highly recyclable; they can be used again and again, regardless of whether the new arrival is a temporary or full-time employee. Since you'll be consulting with other departments, you can exchange ideas and plans, and improve the lot of new arrivals company-wide. The work, once complete, can be reused and refined, but rarely will you have to start it again from scratch. You'll need to review things periodically, but the benefits will be immediate: happier, better-prepared, and—most importantly—more productive workers. STQE

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Checklist for a New Team Member

Prepare for Arrival
- Signed contract
- HR info from contractor
- Keys, badges, and codes ready and tested
- Visa, work permit, and eligibility confirmed
- Resolution of tax issues
- Telephone and voicemail set up
- Phone number listed in directory
- Set up computer:
  - networked
  - all applications installed and tested
  - email account
  - login
  - passwords
  - printer connection

Documents to Provide
- Policies and procedures manual
- Expense and reimbursement policy
- Expense forms
- Telephone and voicemail instructions
- Telephone directory, with key contacts highlighted
- Internet policy
- Password and login instructions
- Software resource manuals
- Names of key contact people in IT, HR, Accounting, etc.
- Organizational chart
- Division responsibilities
- Overview of company
- Key business processes and workflows related to job
- Guide to city, if applicable
- List of frequently asked questions (with answers)