

New joiner guide for managers

How to help and support a new joiner
in your team from day one



Congratulations!

Someone new is joining your team

Onboarding a new joiner can be both exciting and stressful – especially if they are based in a different location or working remotely. As a manager, you want to make them feel part of the team, and you are excited to see them have an impact at Zurich. Fitting the onboarding of a new member around your daily responsibilities can be challenging, but it's worth it.

Benefits of a great onboarding experience

- The new joiner will add value and take their share of the workload faster.
- You will practice and showcase your ability to build a successful team.
- It's cost-effective, as you can save time and resources in the long term.

How can I provide a great onboarding experience?

Don't worry. This guide provides everything you'll need to deliver a great Zurich onboarding experience. It's designed to be flexible and you can use it to understand the Zurich approach to onboarding, as a fully guide, or simply use the appendix as an onboarding checklist. Where do you want to start?

Moments that matter
in onboarding

Your role in the
Moments that matter

Your
checklist



Moments that matter in onboarding

This research-based guide is structured around six moments that have a large impact on the quality of a new joiner's onboarding experience.

You will find quick tips and tools you need to deliver a smooth, successful—and fun!—onboarding experience around these six moments that matter.

Meeting your new team member's needs

Humans have certain needs that must be met to feel motivated and engaged. We've split the checklist for each moment that matters into two categories:

Basic needs – everything from having a seat to the information they need to do their job.

Emotional needs – everything that makes a new joiner feel part of Zurich.

Moments that matter



I chose Zurich

“I am thrilled to be joining Zurich.”

Dynamic first week

“Zurich was definitely the right choice.”



Getting excited

“I feel ready and excited to join Zurich.”

One of the team

“I can actively contribute to the team and role.”



The big day

“What a great first day and fantastic team.”

Ready to excel

“I feel identified with Zurich. I'm excited and engaged.”





I chose Zurich

As soon as the hiring decision has been made, it's time to plan your new joiner's onboarding journey. By considering both their basic and emotional needs, you'll create a great onboarding experience that will help them thrive in their new role from day one.

Top tips

Don't overwhelm your new joiner with too much contact at this stage. Allow them time to celebrate while you ensure that their onboarding process is ready to go.

Basic needs

- Place the IT and workplace orders so devices are provided on time.
- Ensure your new joiner has everything they need to connect to Zurich.
- Review your checklist to plan your activities before your new joiner starts.

Emotional needs

- Let your team know a new joiner is coming so they can introduce themselves.
- Call or email new joiners welcoming them to Zurich, answering any questions they may have, and letting them know you are excited to meet them.



Getting excited

A lot can happen between the offer date and the starting date. Make the most of this time to open communications and start building excitement.

Top tips

Don't share everything with the new joiner at once. It can be overwhelming. Keep open communication and share timely pieces of information.

Basic needs

- Create a specific orientation plan.
- Prepare an orientation meeting or chat about the probation period.
- Gather important data: meetings, events, local Welcome Day.
- Set up their workplace (badge, locker, etc.), and organize office supplies.
- Activate their group/ shared drives, if applicable.
- Order business cards if necessary.
- Define and order workplace:
 - Telephone services (landline, mobile phone, etc.)
 - Hardware & software
 - Authorizations

Emotional needs

- Identify and brief a **welcome buddy**, who will support them throughout the onboarding process. They should be friendly and have something in common with your new team member.
- Set up an informal touchpoint, such as a virtual coffee, with other colleagues during their first week.
- Schedule meetings: Whom do they need to meet and when? When working remotely, schedule informal checkpoints that would happen naturally in the office.
- Send any relevant information to help them prepare and know as much about their new role as possible.

Note: For remote workers, make sure to have regular check-ins, even if they are for just 5-10 minutes.



The big day

The big day has arrived. Your new team member is excited to join the team and take in as much as possible. The only thing left to do is make a great first impression.

Top tips

A little goes a long way on the first day. Give them a small gift to make them feel welcome. You can guarantee they will be talking about it outside of work.

Basic needs

- If there is a physical meeting, give them their badge. Organize a photo to be taken at the reception desk or help them get set up on the OneZurich app.
- Check whether all IT infrastructure is available and ready for use.
- Give explanations of the intranet, [MyDevelopment](#), Tools/resources, form generator, GEMS, etc.
- Provide work manuals, rules, tariffs, etc., or ensure that their buddy can cover this.
- Send and discuss the orientation plan and enter appointment dates in their calendar.

Emotional needs

- If there is a physical meeting, meet your new employee at reception. If you are not available yourself, make sure you have designated someone to greet them on your behalf. Get in touch with your greeter to make sure they will be in on the day and don't have any early-morning meetings that may clash with the new joiner's arrival.
- Your first 1-1: Make sure you set aside time in your diary to have a meeting with your new joiner.
- Tasks handover: Make sure to explain clearly what is needed; instructions should be specific and meaningful.
- Ensure that any questions are answered before you continue the onboarding process.



Dynamic first week

The first week at Zurich can easily be overwhelming. Get in touch and make sure they're still excited and supported, and that they are starting to meet more people on the team.

Top tips

Don't overwhelm the new joiner with training. The best approach is a mix of training and experience. Set tasks that they will be able to deliver to build their confidence.

Basic needs

- At Zurich, caring is one of our six values and a key element of what we stand for and how we conduct ourselves individually and as a business. If they haven't already, make sure they read [Our Code of Conduct](#) and ensure they have reviewed the [Zurich Purpose and Values](#).
- If the employee is authorized to sign off payment orders or creditors for financial institutions, ensure a specimen signature is provided.
- If the employee requires a special visa, please fill out the appropriate form for the respective cost area.

Emotional needs

- Have informal catchups where people in your team and the new joiner get to know more about each other.
- Set up a time for them to introduce themselves at your next larger staff meeting.
- Let them participate in or observe meetings for projects or tasks they will eventually join.



One of the team

In their first month, your new team member wants to feel useful. Provide them with the tools and confidence to try things out and get involved.

Top tips

Take extra consideration for their first project. Find something that is not too risky but that can provide them with small wins to boost confidence.

Basic needs

- Review the [Speak Up website](#) information and Conflict of Interest Policy with the new joiner and inform them that:
 - Zurich is committed to listening, understanding, and acting on the things we need to address. And we rely on our employees to speak up and feel confident in sharing their views, trusting that they will be heard – regardless of whether they are providing feedback, contributing ideas, or raising issues.
 - Reports will be handled with strict confidentiality and employees can remain anonymous by reporting through the [Zurich Ethics Line \(ZEL\)](#).
 - Zurich strictly prohibits retaliation against anyone who speak up.
 - How to identify a conflict of interest.
- Share the brand, product and service information to help the new joiner become a Zurich brand ambassador.

Emotional needs

- Get in touch with their buddy to see how things are going and how to make the new joiner's experience even better.
- Share positive feedback on their performance or progression. Be specific and describe how their contributions have helped.
- Your new joiner will be invited to complete the Code of Conduct training and review the information about Conflict of Interest and the Zurich Ethics Line. Touch base with them afterwards to see where they need more guidance.



Ready to excel

Your new joiner should now feel like part of the Zurich team. They will understand the fundamentals and, more importantly, know where to go to learn what else is needed. This is the final transition from onboarding to full integration.

Top tips

Your new joiner may feel less comfortable asking for support after some time, so be proactive.

Basic needs

- Ask for commercial register entry, if needed.
- Ensure they have reviewed the Zurich Purpose and Values.
- Ensure they are informed about the benefits that Zurich offers.
- Review the People Activities' schedule with your new joiner, which includes:
 - Performance Management Schedule.
 - Salary Review.
 - STIP Awards.
 - Competency Assessment (if applicable).
 - Individual Development Plan (IDP).
- Before the end of the probation period (if relevant for your region):
 - Prepare and hold probation period meetings with the new employee (Orientation plan and Talent profile).
 - After 60 days, check that the new employee receives and completes any required training in [MyDevelopment](#).

Emotional needs

- Connect with your new joiner at the 60 and 90-day checkpoints. Make sure they have all the necessary tools and resources. Ask what they think about working at Zurich, their relationship with the team and whether they are receiving the support they need.
- Organize a team activity or event to celebrate their progression and the results of their probation period.

Appendix - Checklist

Moments that matter

Basic needs

Emotional needs



I chose Zurich

- Place the IT and workplace orders and ensure that devices are provided to the new joiner on time.
- Ensure they have everything they need to connect to Zurich.
- Review your checklist to plan your activities before your new joiner starts.

- Introduce your new joiner to the business.
- Send them a congratulations message.



Getting excited

- Create a specific orientation plan.
- Prepare orientation meeting/chat about probation period.
- Gather important data: meetings, events, Welcome Day
- Activate group drives.
- Order business cards.
- Define workplace and equipment orders.

- Identify and brief welcome buddy.
- Set up an informal touchpoint for the first day.
- Set up calendar meetings.
- Send them all relevant pre-information.

Moments that matter

Basic needs

Emotional needs



The big day

- Give them their badge and take their photograph at the reception desk.
- Check the IT infrastructure is available and ready for use.
- Give explanations of the intranet, tools/resources, form generator, GEMS, etc.
- Send work manuals, rules, tariffs, etc., or ensure that their buddy can cover this.
- Discuss and hand over the orientation plan, enter appointment dates in their calendar

- Meet your new employee at reception.
- Show them around the office.
- Conduct your first 1-1.
- Handover of initial tasks.
- Answer any initial questions.



Dynamic first week

- Make sure they read [Our Code of Conduct](#) and review the [Zurich Purpose and Values](#).
If the employee is authorized to sign off payment orders or creditors for financial institutions, ensure a specimen signature is provided.
- If the employee requires a special visa, please fill out the appropriate form for the respective cost area.

- Have informal catchups.
- Set up a time for them to introduce themselves at your next larger staff meeting.
- Have them attend meetings for projects they will join.



First month feeling

- Review the [Speak Up](#) website, [Zurich Ethics Line](#) information and Conflict of Interest Policy with the new joiner.
 - Inform the new joiner:
 - Zurich relies on employees to speak up and feel confident in sharing their views, trusting that they will be heard – regardless of whether they are providing feedback, contributing ideas, or raising issues.
 - Reports are confidential and can be anonymous.
 - Retaliation is strictly prohibited.
 - How to identify a conflict of interest.
 - Share the brand, product and service information.
- Get in touch with the new joiner's buddy.
 - Recognize progress and share positive feedback
 - Get in touch with your new joiner to ensure they have completed the [New Joiner Code of Conduct Training](#) and other mandatory trainings in their first 60 days and to see where they need more guidance.

Moments that matter

Basic needs

Emotional needs



Ready to excel

- Ask for commercial register entry, if needed.
 - Ensure they have reviewed the Zurich Purpose and Values.
 - Ensure they know about the benefits that Zurich offers.
 - Review the People Activities schedule with your new joiner, which includes:
 - Performance Management Schedule.
 - Salary Review.
 - STIP Awards.
 - Competency Assessment (if applicable).
 - Individual Development Plan (IDP).
 - Prepare and hold a probation period meeting with the new employee.
- Connect with your new joiner at the 60 and 90-day checkpoints.
 - Celebrate their progression with your team and the results of their probation period.