



# New Employee Onboarding Guide

Proper onboarding is key to retaining, engaging talent

By Roy Maurer

**N**ew employee onboarding is the process of integrating a new employee with a company and its culture, as well as getting a new hire the tools and information needed to become a productive member of the team.

Onboarding new hires at an organization should be a strategic process that lasts at least one year, staffing and HR experts say, because how employers handle the first few days and months of a new employee's experience is crucial to ensuring high retention.

## Getting Started with the Onboarding Process

Finding the best candidates for positions in your organization is only part of building an effective team. The process of onboarding new employees can be one of the most critical factors in ensuring recently hired talent will be productive, contented workers.

However, in some organizations, onboarding is often confused with orientation. While orientation might be necessary—paperwork and other routine tasks must be completed—onboarding is a comprehensive process involving management and other employees that can last up to 12 months.

Before implementing a formal onboarding program, employers should answer some key questions to attain team and upper management buy-in, including:

- When will onboarding start?

- How long will it last?
- What impression do you want new hires to walk away with at the end of the first day?
- What do new employees need to know about the culture and work environment?
- What role will HR play in the process? What about direct managers? Co-workers?
- What kind of goals do you want to set for new employees?

How will you gather feedback on the program and measure its success?

Once these questions have been answered, HR professionals and upper management can devise a plan of action to help new employees quickly assimilate company policies and workflow while getting fully acquainted with the organization's culture.

## Creating an Onboarding Program

"If we don't worry about onboarding before the employee starts, then we're way behind," said Ben Peterson, CEO of BambooHR, an HR technology company. "Rather than having a stack of papers waiting for their signature, send them out to the employee beforehand, for electronic signature. Give them their benefits selection. Find the technology to help you automate the paper-pushing process."

As soon as new employees receive a job offer, they can also receive access to the company's online onboarding

portal, said Amber Hyatt, director of product marketing at SilkRoad, a talent management solutions firm.

“Here they discover content that’s designed to engage them, like a friendly note from their manager, first-day information, welcome messages and photos from new teammates, a glossary of company acronyms, a virtual copy of your employee handbook as well as other details about the new hire’s department and job responsibilities,” she said.

New-hire portals also benefit HR through dashboards that can organize and track tasks that need to be completed and managed electronically, such as W-4 or I-9, benefits and payroll forms, Hyatt said.

In addition to having new employees fill out new-hire paperwork online, consider providing the answers to questions they may have, such as where to go on day one, who to ask for upon arrival and what to wear, she said.

Set up new hires’ desk, phone, computer and password logins before they arrive, said Peterson.

“The worst thing for a new employee is being wooed through the recruiting process and then arriving on the job and the receptionist isn’t even expecting you or your office isn’t set up,” he said.

## FURTHER READING:

### **SHRM Foundation: Onboarding New Employees: Maximizing Success**

Onboarding helps new hires adjust to the social and performance aspects of their jobs so they can quickly become productive, contributing members of the organization. This report, *Onboarding New Employees: Maximizing Success*, will provide the tools you need to create an effective onboarding process in your company.

### **Tips for Creating an Effective Onboarding Site**

When employers consider building an online onboarding portal, they should first think about the core messages the website will impart to new hires and integrate those ideas into the design components.

### **5 Steps to Create an Onboarding Program for Managers**

Setting up new managers for success positively impacts engagement, turnover and the bottom line.

## The First Day

The two main goals on the first day should be setting expectations and introducing objectives. Employees need to have crystal clear ideas about what their job duties and responsibilities are on Day 1, Peterson said.

“New employees need to get to know the job and get to know their new co-workers. Social interaction is critical. You



want them back on Day 2, right?” he asked.

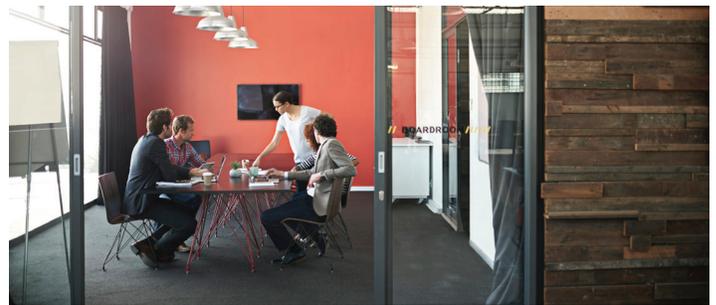
New employees at BambooHR are taken out to lunch on the first day. “We cared enough to hire them, we want them to know we care enough to build rapport,” Peterson said.

Aligning expectations is critical.

“Organizations that don’t focus on acclimating new employees to their corporate culture are at a significant disadvantage,” said Hyatt. “Employees who know what to expect from their company’s culture and work environment make better decisions that are more aligned with the accepted practices of the company.”

To keep existing team members from resenting a new employee, make sure roles and responsibilities are outlined for the entire team, Peterson advised.

“Sometimes existing team members could feel threatened that someone new could take over their responsibilities. So it’s a good idea to clarify the position of the new hire as well as [the positions of] other team members whose work is closely related, how they’ll interact with each other, and how projects will run,” he said.



## The First Few Months

It’s important for HR to have a one-month check-in to make sure that the new employee is comfortable, happy and engaged, said Peterson. “Reviewing and giving thoughtful feedback on your new hire’s early contributions are also important during onboarding,” he said.

According to a BambooHR survey, three-fourths of new hires said training during the first week on the job is most important to them. Meanwhile, 41 percent of HR professionals felt they needed to update training in onboarding.

“If you aren’t communicating what new hires are supposed to be doing and arming them with the tools to do it properly, you’re setting them up to fail,” Peterson said.

You also don't want to inundate your new hires with too much information.

"While it's important to get your new hire ramped up and productive quickly, you also need to make sure you provide on-the-job training in a manageable flow," he said.

Hopefully, new hires have picked a mentor by the end of the first month, Peterson added. Fifty-six percent of respondents in the BambooHR study said that having a buddy or mentor at work was very important when getting started.

The Aberdeen Group report found that high-performing organizations are nearly two-and-a-half times more likely than lower-performing employers to assign a mentor or coach during the onboarding process.

"Mentoring programs can be as simple as assigning a new employee a go-to person or having an elaborate team of mentors for any questions that might arise," Hyatt said.

### **The First Three to Six Months**

Peterson advised HR to conduct another check-in between three and six months, depending on the employee and the role.

"Unfortunately, only 15 percent of companies continue onboarding after six months," he said. Remember, nearly 90 percent of employees decide whether to stay or go within that first six months. "You have a huge impact on that choice. Sometimes you just have to show that you sincerely care," he said.

### **The First Year**

"An employee's performance at the end of the first year will prove if they're fully productive," said Peterson. "Now you can plan for future development. Show them what their career looks like at the company. Sadly, sometimes they don't belong there," he said.

The end of the first year is when traditional onboarding transitions into retention and employee satisfaction.

### **FURTHER READING:**

#### **Onboarding Mistakes to Avoid And Some Creative Ideas to Adopt**

To gather some practical ideas about effective employee onboarding, we asked the HR community to share stories on social media about onboarding wins and losses. Some are real game changers.

#### **Recruiters Can Create 'Unboxing' Experience for New Hires**

A commitment to brand keeps onboarding programs on message. Would your new hires be as excited about their first day on the job as they would be to open a new smartphone?

#### **Executive Onboarding Lessons from Presidential Transitions**

Imagine what would happen if your company's entire executive leadership and management teams up and left at the same time, handing over their badges and turning off the lights without leaving so much as a list of tips behind for the folks who would replace them. Thousands of vacancies would open up in an instant—and your HR team would have less than three months to recruit for those positions.

"Shift from on-the-job training to continuous development. It's also a great time to have the compensation conversation," Peterson said.

"Your new hires will thank you for setting them up on the path to success and your company will be well on its way to turning those new hires into seasoned employees."

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