ONBOARDING ESSENTIALS

Keep your new hire on the payroll and productive from day one

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Introduction

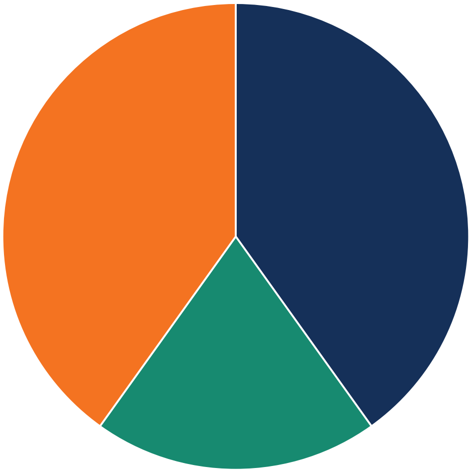
Effective onboarding involves much more than welcoming a new employee on their first day and showing them to their desk. A well-thought-out onboarding program begins in the interview process and continues throughout the first year. The initial weeks and months on the job are critical to your new employee's ability to fit in, become a productive member of your team as quickly as possible, and be an ambassador for your company. Be sure to engage employees early to help them acclimate to your culture and their role in the organization. Twenty-two percent of turnover happens within the first 45 days (Bersin) so it is critical to maintain a close relationship with new hires to ensure long-term commitment and success.

> *A person who feels appreciated*
> *will always do more than is expected.*

Your onboarding procedure should be designed not only to convey important information to your new hire but to also make them feel welcome, valued, enthusiastic, and part of the team from day one. In fact, companies with an engaging onboarding program retained 91% of their first-year workers and 58% retained employees for three years or more (The Wynhurst Group). The importance of good onboarding, from both a practical and a morale standpoint, cannot be overstated.

Onboarding is a critical bridge from the signing of hiring documents to a mutual commitment between the employee and the organization. But it is a step that is often grossly overlooked. Not simply an item on a checklist, the key to successful on-boarding includes a thorough and consistent process that tracks progress along with a seamless integration of an organization's plans and goals.

What Motivates Talent?



Great Company (Brand)

- Values and culture
- Well managed
- Company has exciting challenges
- Strong performance
- Industry leader
- Many talented people
- Good at development
- Inspiring mission
- Fun with colleagues
- Job security

Great Jobs (Product)

- Freedom and autonomy
- Job has exciting challenges
- Career advancement and grow
- Fit with boss and admire

Compensation and Lifestyle (Price)

- Differentiated compensation
- High total compensation
- Geographic location
- Respect for lifestyle

It's true that first impressions matter and affect retention. According to various studies, 90% of employees make their decision to stay at an organization within the first six months. Other studies conducted over the years bear out the importance of onboarding efforts:

- Corning Glass concluded that "employees were 69% more likely to remain with the company after three years if they completed a full orientation program"

- A study of the on-boarding process at Texas Instruments found that employees who went through an improved on-boarding program were fully productive two months sooner than employees in a traditional program."

Top performers, identified early and effectively on-boarded, will maintain and expand their high energy to perform and drive to achieve.

Onsite/Remote Employee Onboarding Checklist

EMPLOYEE INFORMATION
Name:
Title:
Office or Mobile Phone:
Email Address:
Start Date:
Supervisor:
Classification (f/t, p/t, salaried, hourly, etc.):

	DURING THE SELECTION PROCESS
☐	Determine the steps in the selection process, the team members who will be involved in interviews, and the questions to be asked. ***Use the same process for every applicant.***
☐	Use sound interviewing practices (consult our Interview as if your bottom line depends on it booklet for guidance). *It is critical that everyone involved in this process understands that although this is your chance to decide if they're right for the job and your company, it is just as much the candidate's opportunity to determine if this is the company/job for them.*
☐	Present and review the employment agreement: - Compensation and Benefits - Key roles and Responsibilities - Expectations for the first 2 weeks, 6 weeks, 90 days
☐	Provide a copy of the Employee Handbook.

PRIOR TO THE FIRST DAY

- ☐ Confirm start date, time, place, parking, dress code.
- ☐ Prepare and send documents:
  - Signed copy of final employment agreement or telecommunications/remote work agreement
  - I-9
  - W-4
  - Benefits enrollment forms
  - Calendar for the first day, first two weeks, and regularly scheduled staff meetings
- ☐ Remind the new employee to bring/send copies of any relevant identification (passport, driver’s license, etc.).
- ☐ Add to payroll.
- ☐ Prepare employee workstation (phone, computer, office supplies, business cards, etc.). If remote, confirm employee telecommuting workstation and technology (phone, computer, ship business cards).
- ☐ Setup access to any tools or spaces they will need (keys, alarm codes, email, documents/files, etc.). If remote, setup virtual desktop or access to any systems they will need (software, databases, email, documents/files, etc.).
- ☐ Assign and brief an onsite or virtual mentor or “buddy.”
- ☐ Make lunch or virtual meeting arrangements with supervisor, mentor, and other team members for the first day.
- ☐ Send an announcement to your new employee’s team which includes their start day, a description of their role, and a brief bio. Copy the new employee.
- ☐ Arrange for an assessment review with STM for the employee and their supervisor.

ON THE FIRST DAY

- ☐ Welcome them to the team with a small gift – company swag, flowers, a card, or whatever fits your culture. If remote, ship for delivery on or prior to first day.
- ☐ Tour the office and introduce them to people. If remote, provide a virtual or video tour of the office.
- ☐ Review employment forms, benefits, policies, and the job description.
- ☐ Review expectations from the employment agreement.
- ☐ Introduce their mentor or “buddy.”
- ☐ Induct them into the company culture by sharing goals, mission, values, and vision.

ON THE FIRST DAY

☐ Take them out to lunch with key team members. If remote, set up a virtual meeting with key team members and perhaps order lunch to be delivered to them.
☐ Familiarize them with the tools they will be using (phone system, email, shared files, forms, etc.).

DURING THE FIRST WEEK

☐ Schedule dates for ongoing orientation and training.
☐ Familiarize them with key schedules (payday, expense reports due, activity reports due, etc.).
☐ Arrange one-on-one, virtual, or phone meetings with their supervisor (this should be done weekly for at least the first 90 days, preferably for the first year).
☐ Schedule one-on-one, virtual, or phone meetings with team members.
☐ Expect daily end-of-day 10-minute check-ins with their mentor.
☐ Assign first project.

DURING THE FIRST 90 DAYS

☐ Conduct monthly performance reviews.
☐ Evaluate the onboarding process.
☐ Provide opportunities for social interaction with coworkers.
☐ Meet with their mentor to elicit their feedback about your new hire.

BEYOND 90 DAYS

☐ Conduct regular feedback and goal-setting meetings.
☐ Send them to relevant events and conferences.
☐ Continue the mentor program for the first year.
☐ Encourage them to seek out professional development opportunities.
☐ Conduct formal mid-year and annual performance reviews.
☐ Recognize the employee for successes and achievements.

So, what do we talk about?

As indicated in the checklist, the supervisor should be having weekly one-on-one meetings with your new employee during their first few months (ideally for their first year on the job). These do not have to be lengthy ordeals. In most cases a 15-minute check-in will suffice. This is in addition to checking the status of projects. These meetings are a unique opportunity to get a feel for what's going on in your company from a fresh perspective. Use these questions to get your new employee to talk to you and let you know how they are feeling. More introverted or quiet types will take time to "draw out", but just asking these questions lets them know you care about how they are feeling as much as what they are doing.

- How long did you feel like "the new guy"?
- Does it seem to you that the qualifications we asked for are relevant to the job as you now know it?
- Which co-workers have been most helpful to you?
- Are there people here who you can count on to brighten a difficult day?
- Is there anything that has surprised you about the company or the job, good or bad?
- Have you had any uncomfortable situations or conflicts?
- Do you feel that you can express new ideas and that they will be heard and appreciated?
- Is there anyone here whose job is still a mystery to you?
- Are there pieces of information you wish you'd had earlier in your time here?
- How do you feel at the end of the day? (Satisfied, energized, accomplished, exhausted, frustrated, etc.)
- What position would you like to hold in the future?
- Do you feel you have all of the tools you need to be successful here?
- If there is one thing you would change about your experience so far what would that be?

As you can see, effective onboarding involves much more than welcoming a new employee on their first day and showing them to their desk. We hope this checklist will help you improve your new employee onboarding process. Now that you've hired the right person, make sure you get them off to a good start and keep them engaged and productive!

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