



## **ONBOARDING WHITEPAPER**

**2019**

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# Our Proposed Onboarding Process

Do you remember the first day you had on a new job? You were full of excitement and questions were racing through your mind:

- How will I make a good impression?
- What will my colleagues be like?
- Will I enjoy working here?
- What will my working space look like?

You arrived 10 minutes early only to find that your boss wasn't coming in that day, your workspace hadn't been set up for you yet, your assignment was to shadow someone that didn't seem too excited about their job ....

**It was a big slap in the face that ruined all the excitement and enthusiasm you had ... bad onboarding is the reason you felt that way!**

We're closing in on 2019, and you'd think that the onboarding processes of new recruits would have been perfected by now .... but sadly, this is an opportunity that many companies still can't seize the full potential of!

Companies need to start learning how to take advantage of their fresh, excited, and eager to learn employees. And what better stage to do that than the onboarding stage?

Successful companies know the impact bad onboarding could have on the rate of growth of their company and the employees they hire, and so they spend a lot of time and effort developing one that will benefit them on the long run.

<u><i>Bad onboarding</i></u>	<u><i>Good onboarding</i></u>
Higher turnover rate	Higher employee retention
Not getting enough feedback	Is a source for valuable feedback
Frustrated employees	Employees develop good job knowledge
Unhappy employees	Happier employees
Lower levels of productivity	Increased productivity
Increased levels of stress in the workplace	Less stress in the workplace

Slow learning curve	Shortens learning curve
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Developing a good onboarding process doesn't mean that you'll have to splash out a lot of cash, but it does require a lot of organization and testing to create one that is perfect for your business!

Below you will find an onboarding process that is divided into four stages, each with tasks that are meant to help new employees settle in faster, feel welcomed and reach high productivity levels as quickly as possible:

1. Post job acceptance
2. First day
3. First month
4. 2-6 Months

Go through the different stages and compare the tasks to the process you already have in place. Apply the ones you're not carrying out to your business. Not only will this save you a lot of money, but you should also see good results in employee retention levels, employee happiness and productivity!

## Post Job Acceptance (Before the first day)

**Checklist:** Create a checklist of all the different things that need to be taken care of before the first day of work for the new employee. This will prove to be very helpful when preparing for any new hires and will keep the onboarding process smooth, consistent and organized. Without the checklist some things might be overlooked or forgotten (especially if there is a lot of other work to do). By having the checklist ready, the chances of forgetting things that need to be prepared are eliminated and thus will ensure a better experience for the new hire on their first day.

**Clean and tidy workspace:** No one wants to come in to the office on their first day of work only to find that their assigned workspace hasn't been cleaned up and has tonnes of unnecessary items flooding the desk. This will make them feel unappreciated right off the bat and will give a negative impression of the company's organizational skills. By having their workspace all clean and ready for them upon arrival, they will feel welcomed, it will show them that you've been preparing for them and that will make them feel important and improve their desire to want to prove themselves

**Tools:** For any employee to carry out their job correctly, they need to have certain tools at their disposal. If they need to use a computer, then you must make sure to coordinate with the IT team to have one ready and working. Employees come in to work on their first day with an eagerness to prove themselves and willingness to learn. Something as small as not having their computer or tools required ready on their first day will rob you of the chance to take advantage

of that! Having these tools ready will allow you to give them small tasks or assignments they can finish, even if it's just to set up accounts on Slack, Github, mail, etc. This gives them something to do and allows them to become familiar with the tools they will need to carry out their job

**Work area:** When we're placed in a new environment, it's only natural that it takes us a while to become familiarized with the area and the people that are part of it. If you'd like to help your employees settle in quicker, you could try to speed this process up by having a map of the work area ready for them on the intranet or printed out as a sheet on their desk. The bathroom and food/lunch areas will be highlighted along with the desks of other employees. On each desk in the map you could have the name of the person that sits there, their job title and a small picture of them. This will help speed up the process of the new hire settling in and learning everybody else's names and positions. The faster your new employees settle in, the faster they'll become productive and feel like they chose the right place to work!

**Company culture and values:** One of the most important things employees need to understand when starting a new job is the culture and values of the company. By understanding these well, they will know how to better integrate and communicate with others. In order to give new hires a good idea of what culture and values are like at their new workplace, a video or document could be sent out to them before their first day of work. That way they will have a good general idea of what to expect when they come in to work. This will speed up the process of them settling in and becoming a part of the company!

**Gift basket:** After the job offer is accepted, one way to make the new employee feel welcomed and appreciated is to send a gift basket to their home. This won't only serve as a nice surprise for them, but will also send out a message that you are eagerly anticipating their arrival on their first day of work!

However, this can prove to be a bit tricky. If you send a gift basket with items that contain alcohol to someone that doesn't drink, or items with pork to someone that doesn't eat pork or meats, it could have the opposite of the desired effect. Either stick to items that you know most people would make use of/enjoy, or try to ask them a few questions during their final interview that will give you a general idea about what they like and dislike.

**Arrival:** Make sure that other employees, including security, know about the arrival of the new hire. If they come into work the first day and nobody's there to greet them or let them know that they are expected, it can have a negative impact on their morale and they will ask themselves:

- Why is no one here to greet me and show me around?
- Did I come in on the right day?
- Did they send me the correct starting date?
- How could they be so unorganized? I wonder if everything here is like this?

.. and so on. However, by taking care of such a small detail, when they come in on that first day of work and are greeted by the other employees, this will make them feel important and boost their morale allowing them to focus on settling in and getting to know the rest of the team. This will in turn help them feel like they belong and will decrease their chances of leaving anytime in the near future.

## First day

**Coach:** Assign a coach/mentor for each new hire. This is an extremely effective way of speeding up their integration into the company. Whether more senior or junior in position, the assigned coach will be there to show them around, explain how certain things are done at the company, answer any questions the new hire might have or at least be able to direct them to the person who can provide the required information, etc.

Take **Google** for example ... when there is a new hire, HR sends out an email to the manager of that person reminding them of a few points to take care of. One of these points is selecting a mentor for them. **Google** understands the importance of doing this to ease the process of onboarding, help them fit in and reach higher levels of productivity faster!

**First day lunch:** Lunch on the first day is an excellent opportunity for speeding up the settling in process for the new employee. A small sandwich lunch can be arranged, nothing too expensive or fancy, where the new employee is introduced to their manager and the rest of the team. They can learn about their team mates, their roles in the company and how they might be interacting with one another. The manager can also speak to the new hire briefly about how they will be communicating and go over the role and expectations to make sure everything is clear.

**Software introduction:** It's essential that you have someone sit down with the new employee and show them how to use any software or tools that the company uses. This way if they have any questions they can be asked right away, and they will be more familiar with it faster!

**Get them involved:** Start with mini tasks and assignments, even if it's part of a major project that is currently being worked on. Not only will this give them something to do from day one, but by doing this you will be taking advantage of their high levels of enthusiasm and they will feel that they are making an impact from day one! This is such an effective method to help them hit the ground running.

**Netflix** is a company that uses this strategy in their onboarding process for new employees. They give them tasks and assignments on major projects that they're working on. This gives the

new employees a feeling that they are contributing from day one and **Netflix** believes that it also sets them up for success at the company!

Be careful not to give them tasks that are too large from the very first day as this could have a negative effect! Easing them into the process starting with smaller tasks and working their way up is the best way to go.

## First Month

**End of month check in:** This is one of the most important parts of the onboarding process. It serves two main purposes: 1) Showing the new employee that you care about how they are settling in 2) using the information they give you as feedback for tweaking the onboarding process and making it more efficient.

You can ask them questions like:

- Is the job what you expected it to be?
- Do you have a good understanding of your role within the organization?
- Do you feel you have the information, tools, and resources you need to do your job successfully?
- Are you feeling welcomed by other staff?
- What are the challenges you are currently facing and need help with?
- Do you feel there is a specific training or course you can take that would help you perform better?
- Is there any way you think the onboarding process could be improved?

An employee that is asked these types of questions will feel that the company really cares about them being there and in turn will give their all to make sure that level of appreciation doesn't go away!

**Reminder:** During the first month, select a day to sit down with the new hire and go over the plan for the next few months for them. An employee that doesn't have a clear idea of what they are expected to accomplish within a given period will be far less productive than one that does! They will also feel a lot more frustrated and could possibly end up leaving because they feel like the job isn't what they expected.

By sitting down with them and going over what the plans are for next few months, this will help make things clearer and will ensure they know what is expected of them. There will be less frustration and more productivity since they are working towards a clear goal!

**Long term:** It's important for employees to be informed about the long-term goals of the company and how they fit into these plans. It will give them a good idea about where their career is headed and what they need to do to excel in their position and help reach those goals.

**Be A Part Of** is an agency that believes in this strategy. When onboarding new employees, the CEO of the company sits down with them and talks about:

- Where he sees the agency in 5-10 years
- How he intends to reach that target
- What role the new employee will have in helping the agency reach these goals
- How the new employee will develop and grow with **Be A Part Of**

By making this a part of their onboarding strategy, **Be A Part Of** has been successful in creating a working environment where employees are clear about their long-term goals and how they are going to develop and grow with the agency over the years to come. This in turn helps them become more productive and the agency has much lower turnover rates!

## 2-6 Months

**Training & courses:** One of the best ways to onboard your employees is to make sure that they understand their job well and that they have the proper tools and skills to carry it out. By investing in your employees you're helping them improve their skills so that they can carry out their jobs even better. This can be considered a long-term investment as well .... because as they grow and improve their skills within your company, your company in turn will have higher quality employees and grow because of that!

### **But what if I invest in my employees and they end up leaving?**

That is always going to be a risk, but one that is worth taking. What is the alternative? If you don't invest in your employees, they won't grow, the company's quality of employees won't change and in turn the company's rate of growth will be very slow if it even grows at all! If you talk to your employees constantly about their role in the company and how you want them to grow with you, give them a fair competitive salary AND invest in their skills to help them improve themselves and the quality of their work .... why would they leave?

**Competition & market:** A lot of companies don't understand the importance of this step in the onboarding process. If an employee is only focused on his/her daily tasks, it's easy to get caught up in work and its details and forget all about the bigger picture.



**By having regular sessions to discuss competition, their strategies, and activities this will help give new employees a better perspective on the dynamics of the market and the general direction the company is headed.**

It will provide them with the means to think more critically, help them understand their role and other employee roles in more depth and could even push them come up with new ideas or ways that will give the company an advantage over the market!

**Coach:** Having regular meetings scheduled between the coach and the new employee the first few months will ensure that any questions or concerns are addressed as quickly as possible. As a result, settling in will happen faster and the employees will feel that they have a strong support system at work whenever they need it. This is invaluable!

Creating a work environment where the employees feel that they can voice any questions or concerns at any time and get immediate feedback will allow them to carry out their job in a more relaxed manner and be far more productive!

**Activities:** Arrange activities, maybe once a month or so, with the purpose to improve employee relationships with one another. Employees spend almost 8 hours a day together 5 days a week! That is a lot of time!

By having these activities, they will get the chance to further develop their relationships, find common points of interest, share some parts of their personal lives with each other to strengthen their bonds outside the scope of work.

It's important this happens because a team is like a machine, and the employees are its parts. If they don't have a good connection/bond, there are bound to be miscommunications and reaching goals won't be as smooth as when they are more familiar and relaxed with each other.

**Check in:** It's important that at the end of every month a routine check in happens to make sure all is going according to plan, go over the goals and targets and how they are being achieved and to get feedback.

# Cost of Loosing a New Hire

Our new hire costing calculator is a great way to estimate the costs of bringing someone on. To do it over again, requires those costs to be re-spent. Reducing churn by perfecting your onboarding process is essential to saving on your labor related costs.

Using our onboarding process and measuring it against the cost of hiring, will help you evaluate reasonable costs in bringing on a happy new hire.

Have a look at our calculator [here](#).

To use the calculator for yourself, there are some simple steps to follow;

The link is a Google Sheet in “View Only” mode.

Once you access the sheet ...

Click “File”, then “Make a copy ...”

Rename the document if you wish, and start using it in your own account

Hopefully you will find this simple sheet useful for you to do a quick assessment of costs and help figure out reasonable costs to spend on your next new hire!

# Onboarding Checklist

Print the below out each time you hire a new employee. This form will help you to ensure that you have done everything you can. As this document is in RAW form, you can take this and make your own master copy for each role and the needs that come with them respectively.

Name		Department		Email	
Title		ID		Phone	
Manager		Start Date			

Task	Responsibility	Notes
Prior To Start		
<ul style="list-style-type: none"> <li>Assign desk</li> </ul>		
<ul style="list-style-type: none"> <li>Clean desk and surrounding area</li> </ul>		
<ul style="list-style-type: none"> <li>Computer (ready &amp; working)</li> <li>Screen</li> <li>Mouse</li> <li>Keyboard</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul>		
<ul style="list-style-type: none"> <li>Phone</li> </ul>		
<ul style="list-style-type: none"> <li>Chair</li> </ul>		
<ul style="list-style-type: none"> <li>Email setup</li> <li>Slack setup</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul>		

<ul style="list-style-type: none"> <li>• Work area map</li> </ul>		
<ul style="list-style-type: none"> <li>• Email team members informing them of arrival date and time</li> </ul>		
<ul style="list-style-type: none"> <li>• Send gift basket</li> </ul>		
<ul style="list-style-type: none"> <li>• Send video/document of company culture, values and rules</li> </ul>		
<p style="text-align: center;">Other</p> <ul style="list-style-type: none"> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul>		
First Day		
<ul style="list-style-type: none"> <li>• Assign coach</li> </ul>		
<ul style="list-style-type: none"> <li>• Lunch preparations</li> </ul>		
<ul style="list-style-type: none"> <li>• Office tour</li> </ul>		
<ul style="list-style-type: none"> <li>• Introduction to office software and tools</li> </ul>		
<ul style="list-style-type: none"> <li>• Explain task/s required to be completed on first day</li> </ul>		
<p style="text-align: center;">Other</p> <ul style="list-style-type: none"> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul>		

First Month		
<ul style="list-style-type: none"> <li>• Introduction to plan for first 6 months</li> </ul>		
<ul style="list-style-type: none"> <li>• Go over long term plan for company and employee</li> </ul>		
<ul style="list-style-type: none"> <li>• End of first month check in</li> </ul>		
<p style="text-align: center;">Other</p> <ul style="list-style-type: none"> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul>		
2-6 Months		
<ul style="list-style-type: none"> <li>• Assign training and courses</li> </ul>		
<ul style="list-style-type: none"> <li>• Arrange regular meetings to discuss competition &amp; market</li> </ul>		
<ul style="list-style-type: none"> <li>• Select dates for coach meetings</li> </ul>		
<ul style="list-style-type: none"> <li>• Select monthly activity dates for strengthening team bonds</li> </ul>		
<ul style="list-style-type: none"> <li>• Schedule regular check in dates</li> </ul>		
<p style="text-align: center;">Other</p> <ul style="list-style-type: none"> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul>		