# How To Create a
# SUCCESSFUL
## Employee Onboarding Process

Onboarding
101

What To
Do?
What
Not To
Do?

# CALL LOGIC™

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# INTRODUCTION

One of the biggest issues faced by organizations today is a lack of onboarding knowledge. You understand how to write job descriptions, how to interview applicants, and how to pick the best one. However, you struggle when it's time to train the new hire. The reason for this struggle can sometimes be due to the hiring party and the manager having mismatched expectations. For example, the manager might expect new hires to come to their jobs fully loaded and ready to tackle their tasks. The hiring party, on the other hand, might expect that the manager will take time to train new employees.

Whatever the expectations may be, there should always be some sort of job training that takes place at the organization. After all, each company is different; each company has its own rules and its own standards. By neglecting to train new hires on these rules and standards, you set them up for failure. An onboarding process is crucial to your organization. Not only is having an onboarding process considerate to your new hires, but it also helps you prevent another issue: employee turnover! In this white paper we'll show you strategies to help you manage expectations, reduce turnover, and increase effectiveness by mastering your onboarding process from post-hire to beyond.

## The Onboarding Timeline
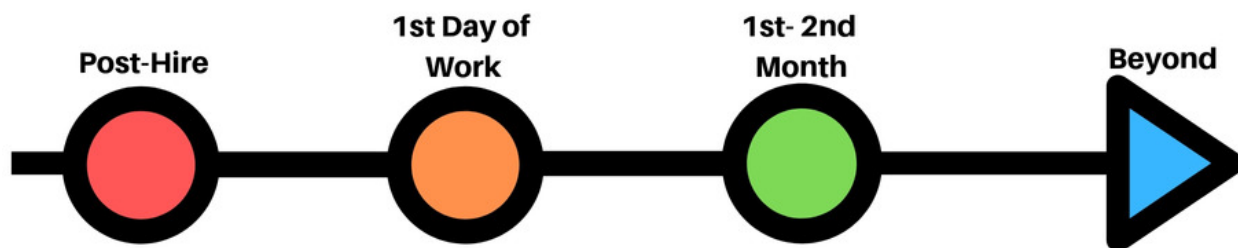
# POST-HIRE

The onboarding process starts as soon as a job candidate becomes a new hire. There is likely a gap of time between when the job candidate accepts the job and when the candidate starts working. That means there is time to plan out the new hire's onboarding schedule. In addition to HR, managers should be extremely involved in this planning process. A coordinated team and well-executed planning are the key to successful onboarding.

## I'M IN HR, WHAT ARE MY RESPONSIBILITIES?

As the human resources specialist, you're responsible for creating a smooth transition for new employees as they begin working. Your goal is to deliver the best onboarding experience possible while minimizing the time it takes new hires to become productive. Thankfully, you aren't in this alone. Your team includes managers who should help you execute training for some of the more technical aspects of new hires' positions. Here are some onboarding ideas you can do ahead of the employee's first day:

### 1. SEND ONBOARDING MATERIALS AHEAD OF TIME

The gap of time between when a job candidate accepts a job and when he or she actually starts working is a great time to send onboarding materials to the new hire. Some organizations set up an onboarding portal that new hires can access online before their start date. The onboarding portal allows employees to begin learning about the company on their own time. This strategy helps save time and allows new employees to come to work ready to tackle the more hands-on aspects of their training.

## 2. PREEMPT ANSWERING QUESTIONS AND SEND A WELCOME EMAIL

To make a new employee feel welcome, you have to think back to when you were first starting out. What about starting your job made you feel nervous or anxious? For many employees, the first day of work can be a nerve-wracking experience. To put new hires at ease, send an email before their first day that explains what they'll be expected to do, how they're expected to dress, and when they're expected to be at work. HR Bartender lists these other common questions new hires often have:

• **How Do I Get Paid?**
• **When Do Employee Benefits Start?**

Answer these and any other questions you can think of to prepare new employees for a smooth first day.

## 3. MAKE SURE THAT A WORK SPACE IS PREPARED

Nothing is worse than showing up to your first day and not having a computer, a phone, or a chair. Work items can easily be acquired and prepared ahead of time so that when new employees arrive, they can start setting up and personalizing their work space. Preparing ID badges, forms, account IDs, and passwords can further streamline the onboarding process for a new hire's first day. In addition to having the regular work items prepared for new hires, some organizations even go as far as to provide a welcome kit. Welcome kits can include candy, a bottle of water, or a small gift card to a local coffee shop. Social platform, Twitter, is reported to give welcome kits that include a t-shirt with a company logo and a bottle of wine.

## I'M IN MANAGEMENT, WHAT ARE MY RESPONSIBILITIES?

If you're a manager with new employees, you're responsible for welcoming them, socializing them, and training them. Here are some strategies to incorporate before the employee's first day:

## 1. PICK A BUDDY FOR THE NEW HIRE

Buddy programs are great because buddies can teach new employees any information that may be overlooked during the onboarding process. We'll discuss buddy programs more in another section. However, before the employee starts, be sure to pick a compatible buddy for the new hire who is:

· **Willing to be a buddy**

· **Knowledgeable about the company**

## 2. LET OTHERS KNOW THAT THE NEWBIE IS JOINING AND SET UP MEETINGS

Managers are also often the person responsible for introducing the new hire to key members of their team. If you're a manager, you can contact these individuals before a new hire's first day to make sure they're available to meet.

## 3. BUILD A SCHEDULE THAT WORKS

Managers may spend a lot of time with a new hire performing one-on-one training. Therefore, managers should be responsible for building a training schedule for new hires that harmonizes well with their own. For example, the manager may know about an approaching meeting. He or she can schedule new employees a small task that will keep them busy while the manager attends the meeting.

# FIRST DAY OF WORK

According to Marcia Zidle, Executive Coach and Career Strategist, the 3 Easy Tips for Successful Onboarding are:

1. **Having a Welcome Kit Prepared**
2. **Providing a Buddy for Your New Employee**
3. **Assigning Him or Her a Small Project**

If you've been following along since the first section, you've already prepared a welcome kit and placed it at the new employee's work space. The next step, according to Zidle, is to introduce the new employee to his or her buddy. Buddy programs are not meant to replace the onboarding process. Rather, they are a useful addition to onboarding and focus on improving socialization.
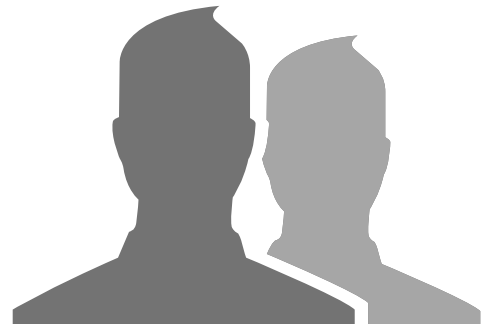
## BUDDY PROGRAMS

First, a buddy helps new hires feel welcomed. New hires can depend on seeing at least one friendly face at the office every day. This is important because employees who have a close friend at work are seven times more likely to be engaged in their jobs according to research from Gallup. Put simply, employees with friends at work are happier. Second, a buddy can help socialize the new employee. For instance, a buddy can invite the new hire to lunch and introduce him or her other work colleagues while there. Finally, a buddy will teach a new employee any unwritten rules or information that wasn't included in the onboarding process. So, if there's a weird electrical issue in the kitchen where using the panini press and the microwave at the same time will trip the circuit breaker, the employee will know not to do that.

## SMALL PROJECTS

Once the new employee has received their welcome kit, you can assign them a small project. This could be reading through additional onboarding materials or taking required quizzes. At Blitz and Call Logic, we use Smartsheet to organize our onboarding materials in one place. Onboarding materials consist of a list of required reading materials, videos, and quizzes. New hires also shadow current employees to get hands-on experience.

## NAVIGUIDES

Onboarding new salespeople can often take a lot of time. If you're a smaller business, time is a luxury you might not be able to afford (especially if the time you've spent onboarding new employees produces unproductive and ineffective salespeople). Rick Longenecker, President of management consulting firm, Chief Sales Leader, recommends using one tool to help companies onboard their sales people faster. He refers to the onboarding tool as a NaviGuide, or navigational guide.

The NaviGuide is basically a platform that combines all onboarding materials in one place. The materials are broken up in a logical format that users can easily click through. Not only is it a great onboarding tool, but it's a tool that salespeople can pull out at any point in their careers and reference. Longenecker suggests equipping salespeople with a NaviGuide to use during actual sales conversations. The benefit to a NaviGuide and similar strategies is that it immediately transfers technical information to salespeople and allows them to immediately begin selling. A NaviGuide tool eliminates confusion by having all documents in one place and also reduces the time that new salespeople need to spend learning about company offerings, sales approaches, and information.

# 1ST - 2ND MONTH

"Studies show that roughly 33 percent of employees decide to stay onboard with a firm or jump ship within their first 30 days of employment."

The first couple months of employment are crucial. If employees aren't happy working at your company within the first couple of months, they'll likely keep searching around for other positions. That's why many HR experts recommend checking in regularly with new employees after onboarding. A check-in could involve a phone call where you ask how the employee is liking the job. Another check-in idea is to send a survey and include space for the employee to add any additional thoughts or concerns. Checking in is a great idea because it tells new hires "that the organization is listening and cares about the investment they've made."

## HOW SUCCESSFUL IS YOUR ONBOARDING PROCESS?

Another goal you should have during this time is to evaluate the success of your onboarding process. If you checked-in with your new hires, what sort of feedback did they give? Did they have any suggestions? You can use these suggestions to revamp your current onboarding process. A strategy that some organizations find useful for gaining more feedback is to put new employees into discussion groups. These discussion groups consist of employees that started at the organization around the same time. In these groups, employees can share how their transition has been. HR can glean useful feedback from these meetings to make the next onboarding group even more successful.

# BEYOND

You would think that employee training would be, at most, a couple months. However, most employee attrition happens in only the first year! To keep your employees the most productive, there needs to be constant growth. After all, organizations that give employees control over the development of their careers find value in increased employee retention. Kerr Inkson, a professor of management at Massey University in New Zealand discusses the idea of career capital. According to Inkson, career capital is the idea that "our careers are assets, similar to our homes and personal wealth, and we should tend to them in the same way."

How we grow our career capital comes down to three questions: why, how, and whom. The first question to ask employees is why they do what they do. What connects them to their career? The second question to ask is how they can improve. How can employees gain more knowledge and skills? What are their strengths? What are their weaknesses? Finally, the last question is whom can help them grow. Will employees best grow by working with coworkers, managers, or customers? Sitting an employee down once a year and having him or her answer the above questions will help the employee build career capital.

# CONCLUSION

Whether you have an advanced onboarding process or one that's more informal, there should always be some sort of job training in place at your organization. The onboarding process starts right after a new employee accepts a position. The main responsibility of HR and management at this time should be preparing for the new employee. On an employee's first day, the goal changes to making sure that the employee feels welcome at the company and is excited to start training. Onboarding doesn't stop there, however. Even up to the first and second month after an employee has started working, HR should check-in and make sure that the employee is satisfied and not looking to leave. Finally, onboarding never really stops since management should continue to develop employees for the duration of their careers at the company. Start employing these onboarding strategies and you'll enjoy successful employees that produce sooner, are more engaged with their jobs, and who will stay with your company for longer.