



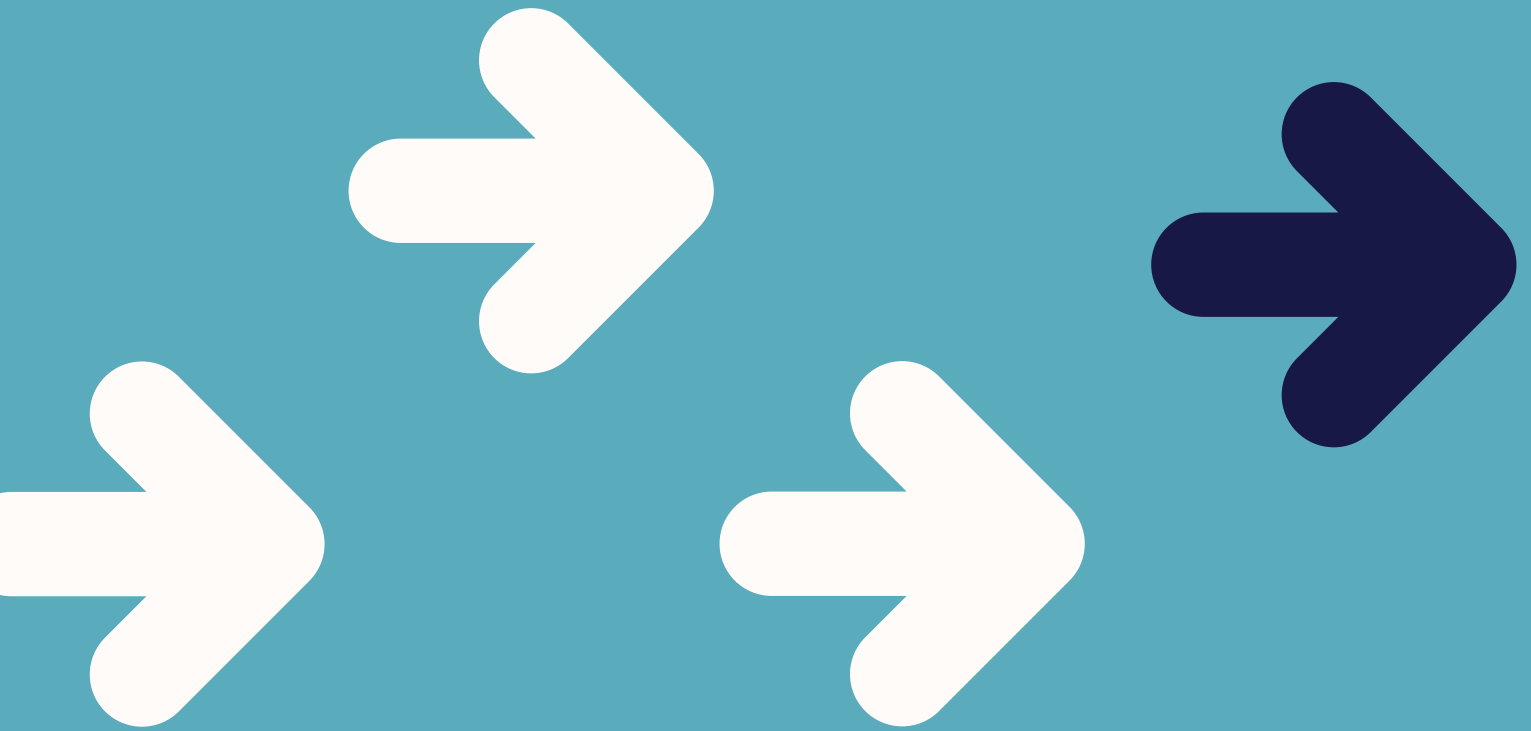
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onboarding's
impact on business.



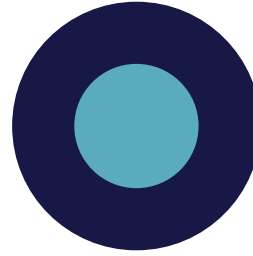
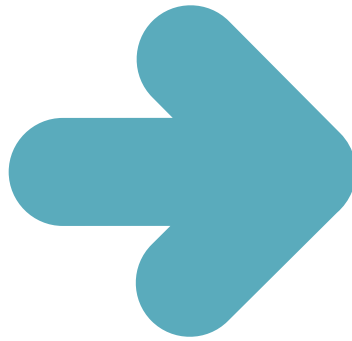
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chapter 1

what is onboarding?
things to know before
diving in.



After countless resumes, interviews and internal deliberations, you've found your perfect candidate and the hiring process has finally come to an end. But no matter how confident you are that you picked the perfect person, there's still more work to be done to ensure they stick around.

Sixty-nine percent of candidates who experience a great onboarding process will stay with their company for three years, while a negative one doubles the chances they'll start searching elsewhere.

Before you start designing your new onboarding process, it's important to come to a consensus about what onboarding is and isn't. This way, you'll get a better idea of the upcoming project's scope and what items may or may not fall under its purview.

what is onboarding?

Informal onboarding refers to the process by which employees learn about their new jobs without an explicit organizational plan. Formal onboarding, on the other hand, refers to a written set of coordinated policies and procedures that assist employees in adjusting to their new jobs in terms of both tasks and socialization.

Also known as "organizational socialization," onboarding is the method by which new hires can acquire the knowledge, skills and behaviors to become effective members of the company. It enables new employees to not only embrace and adjust to the performance aspects of their jobs, but to the social workplace dynamics that drive their employers' culture.

Along with formal and informal approaches, onboarding generally falls under different levels of complexity called the four C's.

compliance

ensuring new employees understand basic legal and policy-related rules and regulations

megaphone clarification

taking the time to make sure employees understand their new jobs and performance expectations

fingerprint culture

providing employees a sense of community by educating them about the organization's values, beliefs, goals, mission and behaviors

connecting people connection

providing guidance about interpersonal relationships and information networks that can enable career success

what onboarding isn't

To truly define onboarding, however, it's important to also understand what it isn't. It shouldn't be confused with orientation. Nor should it be confused with first-day training or an employee's first day on the job.

Orientation largely focuses on gathering and supplying information that's mandatory or routine. Activities like completing job applications and filling out tax forms, while necessary, are generally not what talent experts consider [a full onboarding process](#). The same thinking applies to first-day training and the employee's first day at work. While all these are elements of onboarding, they're only pieces of a larger whole.

Onboarding is not a one-day event, but rather a carefully planned engagement delivered over time.

onboarding is:

- ✓ the method by which new hires acquire knowledge, skills and behaviors to become productive members of the company.

onboarding is not:

- ✗ orientation or supplying mandatory or routine information
- ✗ first-day training
- ✗ paperwork, like tax forms

onboarding's impact on business

A positive onboarding experience is important because it represents the first opportunity for the hiring organization to personally deliver on the career promise as communicated in its employer brand during the recruitment phase. From the perspective of the new employee, the onboarding experience directly reflects on the character of their new employer — how dedicated the organization is to their success, and how satisfying a career they are likely to have.

A [great onboarding process](#) does more than just get a new hire up to speed. In fact, a great onboarding experience [improves new-hire retention by 82 percent and increases productivity by 70 percent](#). In other words, not only does a positive onboarding experience mean that new hires will stick around longer, it also means they get more done. In that way, it can be a powerful workforce management tool.



onboarding survey results

best-in-class companies are 53 percent more likely than others to start the onboarding process before a new hire's first day.

53%

fifty-eight percent of companies say their onboarding programs are mostly focused on paperwork and processes.

58%

eighty-eight percent of companies admit they don't onboard well.

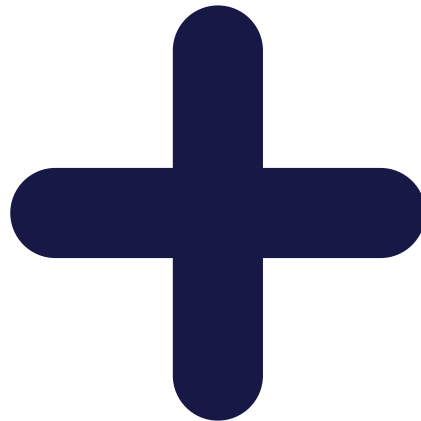
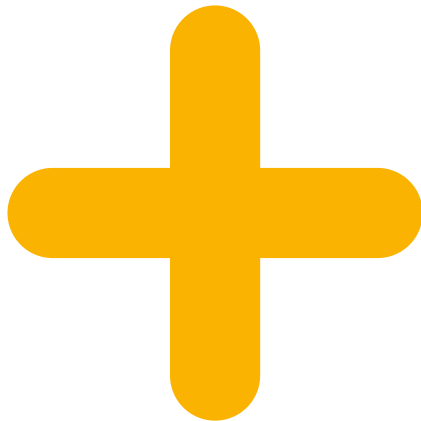
88%

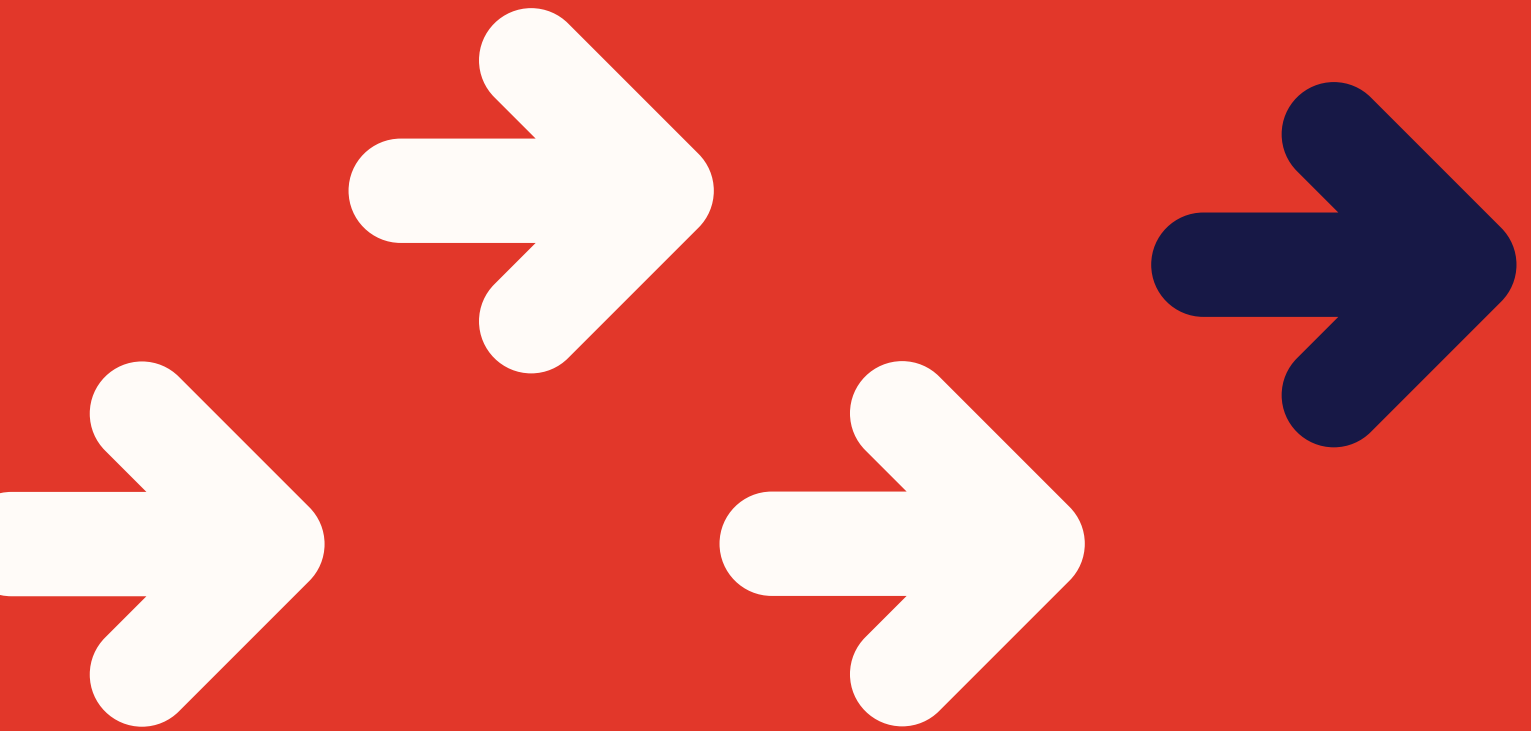
key takeaways

Building a great onboarding process begins with a fundamental understanding of the ultimate aim it's trying to achieve: helping new hires acquire the knowledge, skills and behaviors they need to become productive members of your organization. It's a structured process that stretches beyond rudimentary first-day training to encompass the big picture of what it means to succeed at your organization.

An effective onboarding process can go a long way in transforming new employees into long-term, satisfied and engaged company ambassadors — and we'll walk you through the process of building your own program in the next article in our onboarding series.

To get access to all these onboarding insights in one place, download your copy of the full series [here](#).





chapter 2

how to create an effective onboarding process.

You can answer the questions “What is onboarding, and why is it important?” Now it’s time to start outlining what the process will look like for your organization.

When onboarding is conducted properly, it can produce substantial results for the new employee and the hiring organization. Because of the many moving parts, planning and implementing a sound onboarding process should start with consideration of three elements: participants, information and duration.

1. onboarding participants

Who is going to be part of the process, and how are you going to prepare them?

The onboarding process should involve as many applicable stakeholders as possible — including senior management, immediate supervisors and key coworkers. The strategy is to have important stakeholders and the new employee personally interact in ways that help them understand one another.

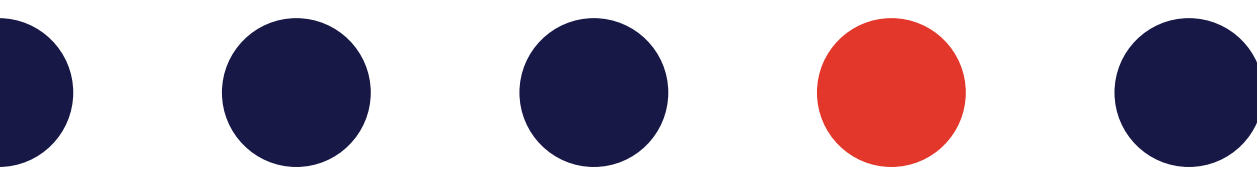
2. information distributed during onboarding

What materials will be needed (such as an itinerary, welcome package and company information) for your onboarding program to be executed effectively? The information provided should clearly inform the new employee about what is expected in terms of job performance, responsibilities and workplace behaviors.

3. duration of the onboarding process

Larger organizations run onboarding programs that can last from several months to more than a year. For smaller companies, an onboarding process that lasts a few days to a few weeks is common.

There is no single magic formula for onboarding a new employee. But with proper planning, a good process, like the one we’ll outline next, can decrease ramp-up time while boosting job satisfaction and loyalty.



the elements of a sound onboarding process

develop an outline of the onboarding process with as much detail as possible

Plan the primary drivers of your onboarding program, including duration, information that will be covered and all personnel involved. Additionally, outline all materials that will be needed, and plan both routine and nonroutine logistical situations like an office or department tour. This up-front investment pays off in the long run.

involve other employees in planning

Company leaders, colleagues or managers who will be working directly with your new hire may have specific insights for making the onboarding process more targeted and relevant. Meet with your new hire's direct supervisor to learn about the position's role, goals, projects and duties. Likewise, incorporate feedback from employees about what they would have liked or found helpful when they were being onboarded.

choose someone to own the process

If you're not implementing the onboarding process yourself, designate a single individual to do so. This employee should be exceptionally knowledgeable about all aspects of the company. Choose an employee who is a proven company "ambassador" with polished communication skills, a positive attitude and a personable approach. Having a single point of contact for all matters of employee onboarding can provide clarity and consistency throughout the process.

communicate to current staff that a new hire will be joining the company

This will help ensure a welcoming atmosphere.



choose a team member who will assist or mentor your new hire

The employee should work in the same or a similar area and be a proactive role model.

contact your new employee before the start date

Your new hire has demonstrated a commitment by accepting the employment offer. Return that commitment by communicating with the new employee as soon as possible and as often as needed. If there's no concrete information to deliver about the upcoming onboarding process, a simple and genuine welcome greeting will do.

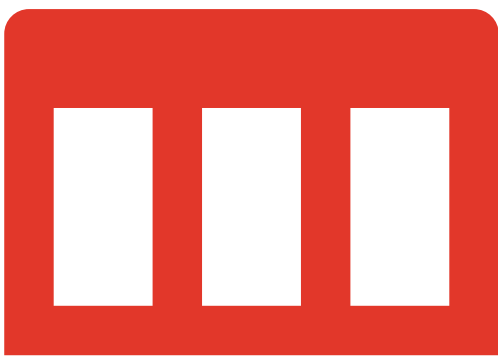
don't neglect the power of re-onboarding after COVID-19

If your team is returning to work after stay-at-home orders due to COVID-19, re-onboarding can welcome them back and re-energize your workforce. [SHRM has a brief but thorough guide to re-onboarding you can view here.](#)

implementing your new onboarding plan

Outlining your onboarding process is a crucial first step to [developing a sound and structured program](#), but how you ultimately implement it will determine its overall effectiveness.

Once you've done your planning, head over to the next article in our onboarding series to learn how to [implement your new onboarding process](#).





chapter 3

10 steps for implementing your employee onboarding plan.

With your new onboarding process in place, and a heap of new hires ready to walk through the door, it's time to put your plan into action. But implementing your process will require just as much care and attention to detail as it took to design it. Remember, 88 percent of businesses admit they don't onboard well, and that's likely because of the many steps involved along the way.

Fortunately, if you follow these onboarding best practices, you'll be sure to get your new program off to a good start.

prepare a warm, personal welcome

Employee onboarding provides the opportunity to make a great first impression. The first person your new hire meets should be central to the onboarding process. This may be an experienced HR staff member, the director of HR, the hiring manager or another relevant stakeholder. Never underestimate the value of a warm handshake and an enthusiastic smile.

provide necessary documents and information

There is undoubtedly paperwork and other information that must be completed by the new employee. Having the necessary new-hire paperwork — all in one place — adds an orderly tone to this process. Furthermore, providing information about the organization's values and history can help make a new hire feel connected right from the beginning.

Relevant information may include:

- a welcome guide
- HR policies or employee handbook
- company-wide policies and procedures
- information about the organization's values, mission and culture
- a company directory and a team organizational chart
- tax forms
- a benefits guide
- key departmental processes
- projects and work expectations
- a glossary of company terms and acronyms
- a detailed schedule of the first day



try to limit first-day administrative tasks

While completing necessary forms and information is a key part of the hiring process, most new hires would rather not spend their first day solely engaged in this task. If possible, provide as much information and documentation online before the first day of employee onboarding. This will leave more time for workplace socialization, skills learning, team bonding and more. If it's not possible to address administrative tasks in advance, take a few days to complete the process.

establish the lines of communication

Every employee should know whom to talk to, whether regarding a business-related question or otherwise.

set expectations about performance

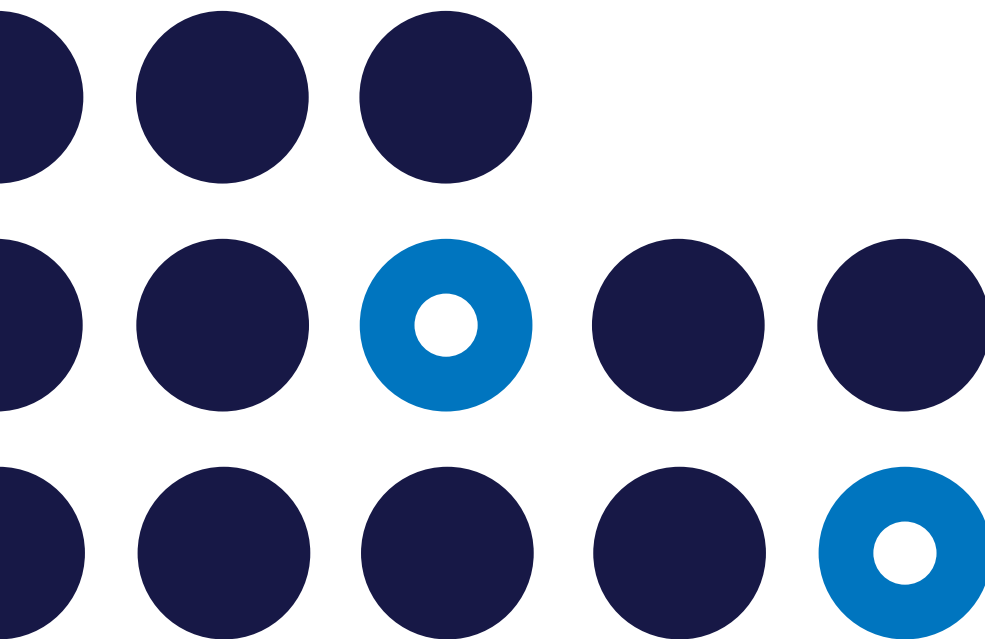
Managers or direct supervisors should also communicate the cadence for reviewing the employee's progress so your new hire knows when to expect feedback. This can be especially critical during the first 90 days of the employee onboarding process.

arrange workplace resources

An onboarding checklist of elements to address may include:

- providing tools or equipment that will be used on the job, including software
- setting up email accounts and communication portals
- company-wide policies and procedures
- supplying reading materials or anything that can help bring the new hire up to speed with current company projects

Include phone numbers for internal resources like the help desk, IT or HR, so the new hire feels empowered to try to fix any issues immediately.



make the onboarding process relevant to the position

While a good portion of onboarding is dedicated to educating the new employee about company-wide operations, culture, goals and mission, time should also be devoted to job-specific learning. These elements may include:

- a tour of the relevant department
- meetings with immediate supervisors
- a detailed description of job responsibilities and duties
- information about departmental processes and objectives

prepare the new hire's workspace

Have all necessary materials, supplies, equipment and furniture in place to create a welcoming environment. Request access to tools or software that may be used.

request feedback on the current onboarding process

Include everyone involved in the onboarding process: your new hire, immediate managers and supervisors, HR staff, senior leadership and coworkers. The collected information can be an invaluable source of actionable data for improving future onboarding efforts.

Careful execution of employee onboarding also involves regular monitoring. Depending on the duration of the process, plan to check in consistently with the new employee and with managers. These check-ins can take the form of a simple phone call or email at the end of each day, or they can be planned meetings that are part of the onboarding schedule.

key takeaways

If you made it this far, and followed all the steps outlined here, then you should be well on your way to improving the onboarding process for your new employees.

Smart onboarding helps businesses move forward and fosters deep personal connections in the workplace. It strengthens an organization's focus on continuously developing its talent, which is something that prospective and current employees value — and expect — from their employers.

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