



A MANAGER'S GUIDE TO ONBOARDING

What if there was a way to improve employee effectiveness, bring company morale higher, and significantly reduce first-year turnover?

Thankfully, there is. It is called onboarding. Onboarding is a strategic, systematic method of bringing an employee “on board” after they are hired. It introduces the new hire to their new position, company culture, and policies in a way that he, or she, can easily digest.

WHY SHOULD WE CARE HOW EMPLOYEES ENTER THE COMPANY?

Companies in the U.S. spend an average of \$10,731 getting new hires up to speed. Even with so much money spent, 25% of all recruits leave before the end of their first year. Those are astounding numbers. A good onboarding procedure can save companies money by helping new hires become more productive, much more quickly. If an employee feels like they have found their “fit” in the organization, they are much less likely to move on.

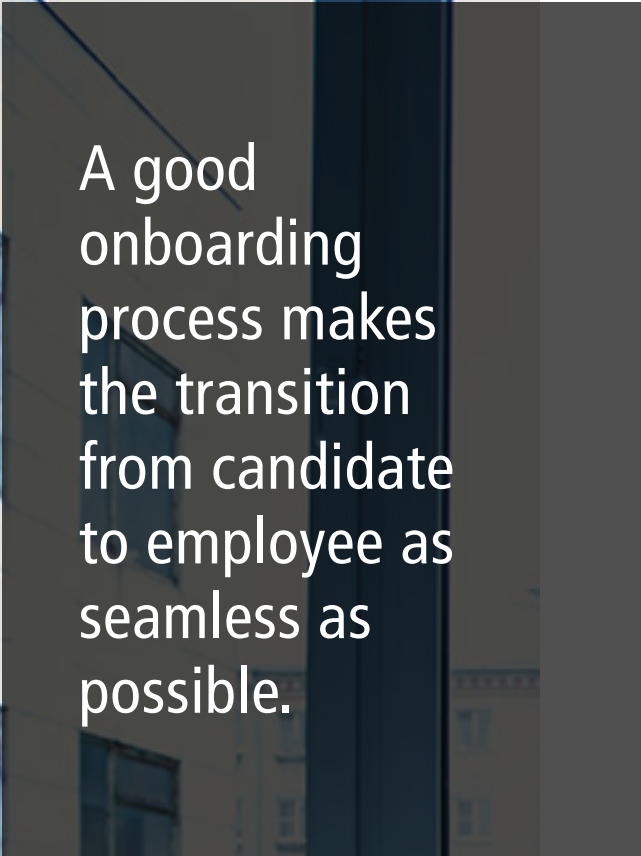
With larger companies, the onboarding process is even more important. There is more to learn and it is easier for new hires to get lost in the crowd and slip through the cracks. Recruitment failures rapidly multiply across large companies causing significant losses in money and productivity.

WHAT DOES ONBOARDING LOOK LIKE?

Onboarding picks up where recruitment leaves off. Recruiters try to make their candidates feel important and special. If there is no process in



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place to welcome them in, new employees can feel a tremendous let down that is hard to overcome. A good onboarding process makes the transition from candidate to employee as seamless as possible. Here are some components that every onboarding process should have:

- » **A reproducible strategy** – Every new hire should go through the standardized process. The more the strategy is used, the easier it should be for managers to integrate new employees into the organization.
- » **Outline of the new hire's first week or first few days** – No one should be guessing what the new person is doing, or who should be helping them. The day should be mapped out with a manager, or mentor, assigned to help the employee at each stage of the day.
- » **An introduction to the company story which should include the vision, mission, cultural values and expectations** – This is the foundation of everything the company does and introduces them to the overall culture of the organization.
- » **An introduction to the employee's work area** – They are introduced to their co-workers and get a tour of points of interest.
- » **Training on equipment and policies** – Show them how to access company software and use any machines particular to their position. Begin to acquaint them with procedures and personnel policy.
- » **Materials the employee can keep for reference** – Provide them with a binder, or large envelope, for keeping all of the material you provide.

The first days at a new company can be overwhelming. Having all of the new information on paper will help them keep up.

» **Performance expectations and goal setting** – One of the most frustrating things for new hires is a vague job description with little feedback. By clearly defining roles and exact expectations, ambiguity is reduced and the employee can focus on what is important. Having milestones marked out in advance let them know where they should be at different stages of their first year. We suggest mapping out specific expectations, goals and objectives for the first week, 30 days, 90 days and if applicable, the first 12 months.


Standardization is the key to successful implementation of an onboarding strategy. This creates a predictable flow for managers that reduces tension and benefits everyone. The same basic process can be used across the company, with changes appropriate for each position.

DEVELOPING YOUR ONBOARDING GUIDE

When beginning your onboarding process, it is important to get your team on the same page. They are the ones who will help you craft, and ultimately implement, the strategy. They will also be an invaluable source of ideas and feedback. Your front line managers see firsthand where new recruits stumble and need help.

Communicate how using this process will lessen the frustration they feel from investing heavily in employees only to have them leave in the first year. It also helps the entire team to have the new person at a higher productivity level sooner.

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START WITH A CHECKLIST

There is so much for your managers to keep up with prior to bringing on a new team member. Developing a checklist is a fundamental step in creating your guide. We hear stories over and over again about companies who hire new employees and their desk, phone, computer, etc aren't ready their first day. This is not the tone you want to set with a new hire. Make sure you have accounted for the following items before an employee begins their first day:

1. Facilities

List out all of the physical items they will require. Determine where the new person's workspace will be. You've assigned them a desk, but do they have a chair? Do they need security badges to access their area? Will they be assigned a parking space?

2. Technical

Make sure their new desk comes with a working computer with all the necessary software. Do they need a new company email address? If so, do they need help setting it up in Outlook, or other email client? Is there a password for the wireless network? If IT needs to get involved, do you need an appointment with a Tech? Get them plugged in right away.

3. The First Day

Be prepared for your new employee's first day. Have the day outlined so that there is no ambiguity for you or the employee. A smooth entrance into the company reduces tension for everyone involved. A sample itinerary may look like this:

- 9:00** – Employee arrives. Manager introduces them their workspace.
- 9:15** – Tour the office and introduce the new hire to their new co-workers. Show them around the building and point out the pertinent areas (bathrooms, breakroom, etc.)
- Noon** – Take the new employee to lunch. Invite a few of his, or her, new co-workers.
- 3:00** – Training. Your new recruit needs to be given a company hand book and walked through the most important procedures.
- 5:00** – Let them know how important they are to the company before you, or they, leave for the day.

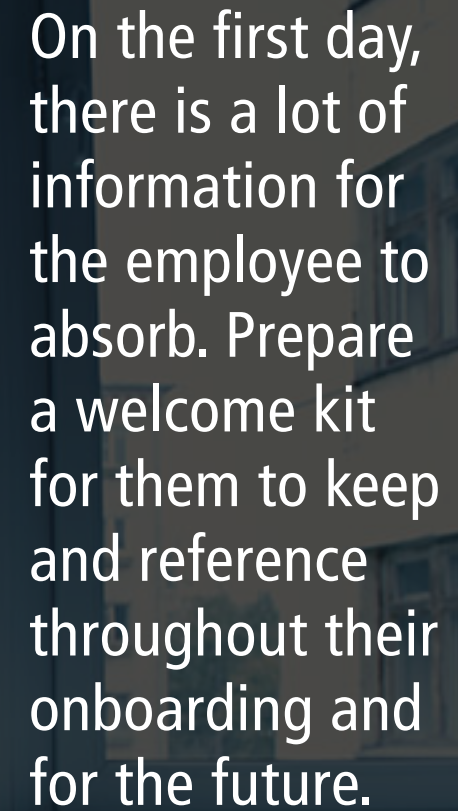
THE WELCOME KIT - WHAT SHOULD YOU INCLUDE FOR YOUR NEW HIRE?

On the first day, there is a lot of information for the employee to absorb. Prepare a welcome kit for them to keep and reference throughout their onboarding and for the future. This kit, which often is in the form of a custom pocket binder, should include:


The Company Story – Vision, mission, cultural values, company history and other basic company info (how long has the company been in business, key figures, website, social media, mission statement).

Company Directory – A call sheet with the contact info and email addresses of coworkers, important departments (such as HR and IT) and key supervisors.

FAQ - List of common questions and who the employee should reach out to for HR, technical support, supplies, etc.



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Company Handbook – Policies, vacation request procedures, company holidays, social media policy, benefits.

Technical Instructions – Provide them with details on how to log on to company's systems, including usernames and temporary passwords.

Position-specific Information – Training materials and confidentiality agreements. Are there any security procedures of which they need to be made aware?

Performance review and goal setting – Make sure they have clear goals outlined and they understand what their performance will be graded on. Having this to refer back to will ensure that the new hire knows exactly what is expected from them, and how to achieve their goals. Again, important to map these out specifically for their first week, 30 days, 90 days and if applicable, first year.

HOW TO IMPLEMENT AN ONBOARDING PROCESS

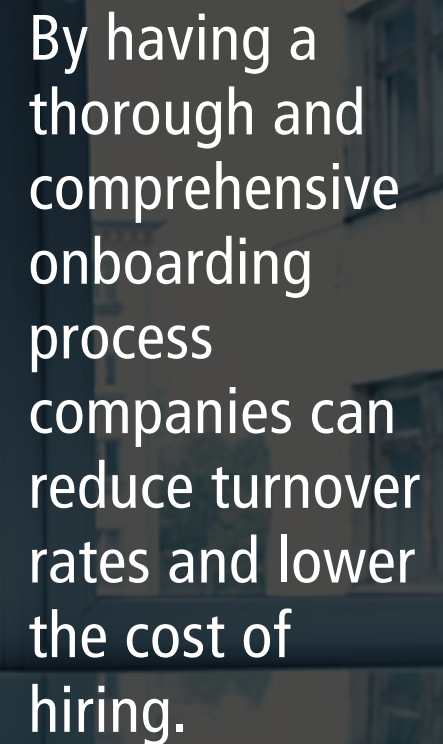
To start your process, start taking notes about how your employees come onboard now. Where are you seeing them stall out? Brainstorm on new ways to help ease the transition. You can also send out surveys to your latest recruits and ask probing questions about what would have helped them at the beginning, and how their first year experience can be improved. Once you have a good idea about what your process should look like, these steps can help in implementation:

1. **Standardize the Process** – Create a document that can be a living, breathing record accessible online, in the company handbook, or printed out and placed in a binder.

2. **Embrace the Concept** – If your team doesn't believe in the concept of onboarding, the process will never be fully carried out. You may need to invest time in converting your team. It ultimately benefits the whole team to have new recruits that are more productive and stay longer.
3. **Tap Your Team** – Groom mentors from within your team. Train them on the process so they will be ready when the plan is implemented. Mentors will be using the system on a daily basis. Managers will oversee the mentors to ensure the process is being carried out with each new employee.
4. **Evaluate the Onboarding Process with each New Hire** - Ask each new hire to evaluate their onboarding experience. The best way to improve your onboarding experience is to gather feedback from each new hire between 30 and 60 days. Ask them for suggestions on how to improve it. What would they have done differently if they designed the onboarding program? What suggestions would they have for future new hires, etc.

ONBOARDING FOR BETTER RESULTS

Onboarding is an important part of every new hire. By having a thorough and comprehensive onboarding process companies can reduce turnover rates and lower the cost of hiring. When an employee has a smooth transition and a clear roadmap to success, they are much more likely to think they have made a good career move. If you need assistance with developing an onboarding program at your company, we would be happy to review what you currently have and provide feedback.



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