A Manager's Guide Through The New Hire Onboarding Process

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Employee onboarding and why it matters

The onboarding process is one of the best opportunities for a company to communicate who they are and the values they embody with new employees. Companies and new hires both benefit from an effective onboarding process that infuses culture and mission from day one. A good onboarding process shows new hires what is expected of them; a great one shows new hires not only where they can fit, but where there is room to grow, contribute and thrive within the company. Unfortunately, only 12% of U.S. employees say their company does a good job of onboarding, according to Gallup.

Here are the critical components of effective onboarding process

1. Communicates and integrates culture and process into new employee experience.

Consider the size and scope of your company before beginning your onboarding strategy. Does it make the most sense for a new hire to go through a week shadowing their boss or would they benefit from a week of meetings and presentations from different team members on different aspects of your organization?

Looking at what an employee could learn from a job-shadow onboarding experience might show the critical elements that are worth drawing out and communicating in a formal onboarding process; for example, Customer-staff interactions represent a critical point for value transference. New hires need to understand how the company values apply in conversations with customers, users, or other staff. While new hires may get practical training down the road, the values that apply need to be communicated clearly early on.

2. Creates a welcoming environment for new employees and provides the equipment, expectations, and experience they need to be successful.

Many people have shown up for the first day at a new job, only to find an office manager hastily clearing out a desk and begging IT to restore a laptop, and no arrangements or meetings set for their first day. No matter how connected an employee feels at this point to the mission or vision of an organization, a disorganized day one does not foster trust or facilitate effective work. With access to equipment, clearly communicated expectations, and appropriate training, employees can set to work with confidence in the company and themselves.

★**Tip**

Think about what you want your new hires to know about your team culture.

Part of preparation also includes an agenda for the week. Knowing what is expected on a daily basis and having a chance to prepare for important meetings or trainings will help new hires feel like they're set-up-for-success right off the bat.

To go above and beyond, welcome new members with a small gift - a branded t-shirt, water bottle, or a few snacks to energize them on their first week. At Leadr, we're passionate about investing in the growth of our team, so we include 3 of our favorite leadership development books in our welcome package.

3. Reinforces mission and values, shows new hires paths to participate in the mission and values.

Mission and values can be read from the organization's website, paperwork, and usually from the walls somewhere in the building! But translating those values to life and work in various roles takes some adapting. A good onboarding process should make mission and vision both more memorable and more practicable for new hires.

Our new hires spend a lot of time in their first week learning our core values, beliefs and mission. We have each person answer thought-provoking questions about how they will live out these values and apply them to their work. This helps each employee feel connected to our mission before even jumping into their work.

4. Sets the tone for behavior, communications, and perspective on the company.

Clear expectations from the outset prepares new hires to live out the mission and values from the outset, avoiding public mistakes for employees and the company. Depending on the size of your organization, these expectations may come directly from the CEO or the person's manager.

5. Introduces employees to the other departments, especially those they'll work closely with.

Whether it's a walk through the office or a set time to meet with each department in your organization, a who's who helps everyone feel more connected from the get-go. Introductions reduce some of the ambiguity of beginning in a new role, and understanding organizational structure is critical for every team member to perform at their highest potential.

A great way to provide time for new team members to build stronger connections from the get-go is by hosting a new member lunch or coffee break to create more casual space for employees to get to know each other.

6. Provides opportunities for questions and feedback.

Throughout the week, be sure there are plenty of opportunities for your new team members to ask questions and share how the week is going for them. Clarity is critical for success, so ensure your new hires feel comfortable expressing concerns or confusion from the get-go. It's also important to understand how new hires perceive the onboarding process. Get their feedback to know where you can improve in the next round of onboarding.

Designing the onboarding process

Pre-boarding

Onboarding systems create many opportunities to make new hires feel welcome and part of the culture right off the bat. Here are a few suggestions that can begin building a great onboarding experience even before a new hire's first day:

1. Welcome them to the team! Have the hiring manager or an executive send a welcome note to embrace the new hire

2. Set your new hire up for success by sending their schedule the week before. This helps them know when they need to arrive each day and what to expect throughout the week.

3. Send helpful company information such as dress code, working hours, parking information, closeby coffee shops or lunch options, etc. to help them plan for their week.

4. If there is any information you can send ahead of time on your HR platform, benefits enrollment, and other tools they might be able to read through or work on ahead of time, send those over. It will help new hires feel that much more prepared on their first day.

Hiring managers or onboarding managers have the opportunity to set up new employees for success in so many ways. Information overload is overwhelming for new employees, and treating these early steps as a kind of pre-boarding process gives new hires more time to process the information and get familiar with the organization.

Welcome packet

A comprehensive Welcome Packet typically includes:

• Employee Handbook
• Office dress code and behavior guidelines
• Parking information
• Parking pass or office key
• Staff Contact list
• Organizational mission, vision, values
• Organizational chart
• First-day details

Adding relational or personalized elements of welcome, such as a note from the employee's new leader, company swag, or gift cards to local restaurants or coffee ships for first-week breaks and lunches is a simple way to go above and beyond. If the new hire is relocating, a packet of community information is a good way to communicate interest and empathy for their move.

Designing the onboarding process

HR forms

A new hire's first day generally feels overwhelming, but some of the paperwork can be filled out at home to alleviate the information overload. For remote employees, submitting these forms is sometimes required prior to day one, before any equipment is shipped to them. Typical forms are:

- Health insurance enrollment
- Payroll system log-in and direct deposit registration
- Tax forms
- Retirement paperwork

Workspace

New hires should feel welcome, expected, and prepared for. Some things you might need to prepare if the new hire is working onsite are:

- Keys/fobs/security/identity badge
- Business cards
- Branded swag
- Computer access and IT profile
- Email account setup
- Essential software user registration/access
- Phone/voicemail setup
- Any company-provided devices should be cleared of prior user data and ready for a clean setup.

Tasks to schedule & communicate

- Business Hours/First Week Meetings
- New hire headshot
- First day team or 1:1 lunch with new hire

Many new hires are remote or at least partially remote these days. The above list still applies, but some of the tools may need to be shipped to the employee. A good Pre-boarding process should help new hires to feel confident in the organization, able to get the answers they need, and positive about their upcoming role with a new organization.

New hire timeline

Much is dependent on the role, the company, and the employee, but for a truly effective work experience, employees need regular leadership touchpoints throughout their experience at any organization. How and when regular conversations take place is subject to plenty of variation, but it's suggested that at least three scheduled checkpoint meetings are set for new employees at first day, first month, and at the first 90 days in a new role. Other milestones (First Week, First 180 days, etc.) may be added, but at least these three should be set up as expected touchpoints.
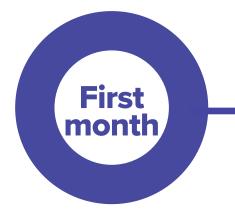
New hire timeline

First day

Intentionality on a new hire's first day is important. Personal and relational touches like a welcome note, a prepared name plate on the office door or desk, or some small welcome gift go a long way to making a new hire feel confident in their new role.

Assign a team member to meet the new hire on arrival. This person should facilitate the first day of meetings, introductions, a facility tour if necessary, and getting settled in. This person should be available most of the day to answer questions, make an introduction, host lunch with some team members, and help the new hire negotiate meeting, technical and equipment onboarding, and building relationships.

Download our sample day one schedule here

First week

Week one is all about conveying new processes and expectations. Find ways to build connection and fun into this week. One way to make intentional efforts throughout this week is having pre-written emails that go out once a day introducing the employee to an aspect of company history, culture, or fun facts. These can also include thought-provoking questions to help new hires consider their goals for working with you. These small touches make employees feel involved from the get-go, even though these emails are pre-written and scheduled.
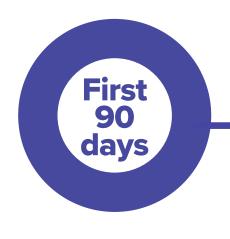
First month

Assign a coach or mentor to be the communications touchpoint for a new hire's first month. This person should meet weekly with the new hire, be available to answer questions and explain organizational nuances or context, and help guide new relationships within the community and organization. A good coach or mentor should include casual conversations and fun activities with the team in addition to professional communications, fostering wholehearted relationships.

As a mentor, it can be difficult to foster new relationships when you have a full plate of work to get done. Our free conversation cards make it easy to build an authentic relationship and ask intentional questions without spending too much time away from your responsibilities.

For a more comprehensive guide, check out The Hands-On Guide For First Time Managers.

New hire timeline

First 90 days

This crucial period often is an indication of the hire's potential for long-term success in their new role. A checklist for a healthy first season in a new role can help identify if an employee is set up for longer-term success. Can employees speak to all seven items in the list below? (from Michael Watkins' book The First 90 Days)

1. **Diagnosis:** identifies and articulates the key challenges of the role
2. **Alignment:** is in line with organizational culture and values
3. **Relationships:** builds strong relationships with co-workers
4. **Communication styles:** generates an understanding work environment for his/her team, with open communication about personality and communications styles.
5. **Clarify expectations:** knows the major objectives of the role, team and organization.
6. **Team assessment:** knows team well and understands how to help them succeed as a team and individually.
7. **Early wins:** identifies opportunities to create success within this first season.

In addition, this period is a great time for HR to create opportunities for check-ins, gathering onboarding learnings and feedback on the process, the company, and the experience of entering the company.

First 180 days

The six-month mark provides a good opportunity for candid conversation with a new team member, and should be scheduled well ahead of time as an expected onboarding milestone. The simple act of having this meeting on the calendar sets a clear expectation for the employee and their team that there is oversight and that their performance within the organization matters. The new hire should know, too, that their perspective as a new person in the organization matters, and the evaluation should include their feedback.

Candid feedback between leaders and direct reports is critical for growth and success. If you're a new manager or looking for ways to improve your one on one meeting style, check out our **How To Guide For One-to-One Meetings**.

First year

An annual review or personnel evaluation of some kind is part of many HR processes. Employees should receive a copy of the annual review form early on, possibly as part of the welcome packet, so they know what expectations are for the role.

If you're lost on where to begin with developing a meaningful performance review, here's our **Comprehensive Review Of A Performance Review** to guide you through the whole process.

Ongoing learning and culture-building

It's important to create a plan for communicating culture and values on an ongoing basis. These ongoing learning opportunities will be significant especially in the first year, but are often valuable as reinforcement for longer-term employees, too.

Ongoing learning and culture-building

Cultural vocabulary
Some organizations have specific vocabulary. For example, referring to 'customers' as 'guests' may be a significant cultural element of a company's brand. In these cases, reinforcing vocabulary should be as much a part of onboarding and training as the organization's vision statement or branding guidelines.

Ongoing infusion of organization values
As much as you talk about your organizational values throughout onboarding week, it's crucial that this learning continues throughout a new hire's first year. What are some ways you can reiterate your culture and values to new hires overtime without spending too much time? Here are some ideas:

Make culture a part of your staff meetings. Have a team member choose a value and highlight how they saw it lived out that week or month.

Have the leadership team record videos over each of your values. New hires can watch one a month and answer reflective questions about how that value applies to their role and how they'll live it out

Have employees email their leader once a week with a way they lived out one of the values and where they saw someone else live one out.

When project planning, be sure to tie each initiative back to a value.

Learning plans
Showing your staff that you're passionate about their ongoing development helps to build rapport. In fact, according to Deloitte, employees in organizations with strong coaching cultures are 24% more likely to be highly engaged.

Have an internal forum or prominently available plan for leader-recommended learning materials—classes, conferences, videos, softwares, subscription lending plans, etc.

Mentoring/coaching plans
Mentoring/coaching plans for the first year at least with their mentor or manager. This should be a place for mentors to provide a safe space to answer questions and provide feedback:

Sample schedule:
- Month 1: Weekly meeting
- Month 2-3: Bi-monthly meeting
- Month 4-6: Monthly meeting
- Month 7-12: Every-other month

This not only helps new hires onboard more seamlessly and build connections, but it also helps develop leadership skills for the mentors.

Staff habits culture:
Are there habits and practices that define your work cultures? Intentionally writing and teaching them can help to transfer cultural practices effectively.

Sample topics to teach and encourage:
- Social media awareness
- Providing intentional feedback to each other
- Having great conversations defined by honesty and integrity

It's important to actually hold your team accountable for anything you spend time teaching them. Ensure each leader knows to evaluate and discuss these items especially early on with new hires.

Personality awareness learning and team-building
Personality assessments as an organizational or team activity can increase awareness and understanding of conflict, interaction, communication struggles, and may help a team or organization be more successful and united. Here are some of the assessments organizations use.
- Meyers-Briggs Type Indicator
- DISC Profile
- Strengthsfinder
- Insights Discovery Profile

Having staff display their personality types on their desks, in their email signatures, or in your HR platform helps others understand how to work with and communicate with each other.

Operational trainings
Software, internal systems, the new email platform, travel protocols, etc. Many of these essential systems have a learning curve. Encourage the administrators of various systems to create regular training opportunities or Q&A sessions.

Looking for a more in-depth plan for people development?

Check out our Ultimate Guide to Leadership Development.

How do you know if your onboarding process is working?

Research by Glassdoor found that organizations with a strong onboarding process improve new hire retention and productivity, creating strong connections early on, helping new hires integrate into the organization and empowering them to be productive and effective in their roles from day one.

The answer to this question will certainly prove itself over time, and every system is subject to continuous improvement. But initially, here is a checklist of some good general indicators of an effective onboarding process:

How do you know if your onboarding process is working?

Pre-onboarding

- Any paperwork that can be completed ahead of time has been sent to the new hire.

- New hires have a solid agenda of first-week activities and tasks, as well as any information necessary for parking, schedule, dresscode, and expectations.

Onboarding week

- New hires are able to accomplish a checklist of onboarding tasks, forms, and/or internal account management setups on day one with minimal guidance.

- Technology and other tools and resources are ready to go as soon as a new hire arrives (Bonus if a welcome package is also prepared)

- Current employees know the new hire is coming and what their role will be - especially if those individuals will work together.

- There is a planned time throughout the week for new hires to ask questions throughout the week and provide feedback regarding the onboarding process.

- There is a plan for introducing new hires to other departments. This can be through one on one meetings or a walk through the office.

- Most new hires have access to the information they need, and rarely need to go to the hiring manager for essential information.

- By the First Week meeting, new hires and coaches report that they have most of what they need to accomplish their daily work. Exceptions are rare.

- You can point to examples of the company mission/vision/values being lived out effectively (seeing employees reading a recommended book while on break, witnessing a good customer service interaction, or seeing an employee take initiative in a values-centered way.)

After week one

- New hires know their point of contact for different questions such as HR, organization-wide/culture, role-specific, etc.

- The transfer of values is always planned as an ongoing process, and it is proved successful in the living out of those values over time. What are some ways you can infuse culture into a new hire's first few months?

Let's get to onboarding

Creating a scalable employee onboarding process that engages and excites new hires is the key to first impressions and retention. It may take time to build a process that works for you, and hopefully you will tweak and add to your process overtime. Onboarding may be a few days or a few weeks depending on your organizational size and culture.

What matters is that you document as you go. As you're working toward a winning strategy, write out your plan step-by-step somewhere where you and others can adapt and repeat this process over time. Creating a successful onboarding plan is all about adopting a purposeful, people-centered mentality that helps you prepare your team for ongoing success and development.

How can Leadr help?

An engaging and effective onboarding plan is key to setting your team up for success, but employee engagement doesn't stop there. At Leadr, we help leaders engage and grow their teams throughout the entire employee lifecycle

Ready to see Leadr in action?

Click here to connect with a member of our team for a live demo of the tool.