The Healthy Business Bookmark™

Guide for Employee Onboarding



Onboarding in the process of performing all the organizational actions that support new employee integration. It involves carefully planning the first few weeks and months to ensure a new employee has access to the information, tools and support they need—when they need it—for the best chance of success in their new role. Companies have the chance to make or break the new hire's first impression of their new job by the quality of their onboarding experience, so let's review how to get it right.

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What is Onboarding?

Onboarding is the process of performing all the organizational actions that support a new employee's integration.

Sounds simple, right? Then why do so many organizations get it wrong? To do it right, you need a thoughtful, comprehensive process—time and effort that only the clever organizations recognize as time well spent. While you may be sure you've hired the right candidate, they are likely still assessing and deciding if they have made a wise choice and if the role is actually a good fit for them.

A successful onboarding process will help reassure your new hire they have made the right decision. This includes everything from the initial offer to the first days, weeks and months on the job, until:

- all the necessary information is gathered,
- your policy, cultural and safety training programs are delivered, and
- key introductions and tours are completed.

Every part of your onboarding process affects the new hire's onboarding experience and, in turn, their perception of their new role and organization.

This Blueprint reviews what is needed to make a welcoming, professional and positive impression that will greatly impact employee engagement and retention.

Protecting your Recruitment Investment

Many businesses have robust recruiting strategies and processes to attract the best staff. Some may believe the hardest part of hiring is done once recruiting, screening, interviewing, testing and selecting the right applicant is completed and the candidate signs the offer letter. But the hiring process does not truly end until the employee is functioning at full capacity in the new position, often weeks or months after the first day at work. Onboarding involves carefully planning those first few weeks and months to ensure the new employee has access to everything they need, when they need it, for the best chance of success in the role. Even the best hire can be sabotaged by a poor onboarding process. Protect your investment of time and resources to ensure the new hire has what they need to flourish.

Orientation Vs Onboarding

According to the Society of Human Resource Management, "The difference between employee orientation and onboarding is the amount of time spent connecting the new employee to the job, to the team and to the company's values." Orientation is just one piece of the onboarding process.

Orientation is a one-time event.



Onboarding is a process.



First Impressions Matter

First impressions really do matter because change—even when it's positive—is hard. Research shows at least one in five new hires will leave during the first 45 days on the job, and a third will quit within the first six months. Creating a welcoming, comprehensive onboarding process can mitigate the risk of turnover and help build job satisfaction, productivity and loyalty. You want the employee to feel welcome and valued, to know you care about their success and development and to reinforce that they made the

Benefits of a Comprehensive Onboarding Program

The benefits of having a comprehensive onboarding program may seem obvious for the new hire, but there are numerous benefits for the employer as well. The chart below shows how the benefits line up for both parties.

It helps new employees	It Helps the employer
Feel welcomed, valued and professionally supported	Reduce number of queries from new hires by proactively providing what is needed and improving retention
Meet many new colleagues, receive co-worker support and learn about the company culture	Divide the onboarding responsibility across several areas and foster employee engagement
Hit the ground running with the necessary tools, resources and an organized schedule	Maximize new hires' productivity and plan any required training
Understand expectations and perform better in their jobs, sooner	Shorten new hires' ramp-up time to make contributions
Reduce anxiety and stress and have a positive onboarding experience	Improves the "employer brand" and may result in employee referrals
Succeed in their role	Ensure the new hire successfully contributes to the organization

Best Practices of Onboarding

Timely Communication

Timely communication is vital. Candidates know all too well what it is like to feel excited about a potential job opportunity, but gradually that feeling of excitement can wain or change to indecision if the process is too lengthy or long gaps in communication occur. Doubts can creep in such as: What's taking so long? Have they changed their mind? If the hiring process takes this long, candidates may wonder if other processes are equally convoluted with too much red tape. Am I making a mistake by joining a bureaucratic organization?

Offer Letter

Since onboarding begins with the offer letter and not the first day on the job, it is worth considering the tone of your offer letter. Getting an offer letter from an organization you wish to join is truly an exciting moment. However, the tone of many offer letters is often dry and full of legalese, which may be necessary, but not terribly inspiring. While it is critical to have a comprehensive offer with clear terms and conditions that form the legal contract between you and the employee, it's important to consider the following:

- Leverage the opportunity to convey genuine excitement about them joining, particularly in the opening and closing of the letter.
- Incorporate some simple messaging that you value the skills and experience they bring to the team.

Maximize the Time Between Offer Acceptance and Day One

Once the offer has been accepted, remember that your new hire may have just resigned from a current role and may still be reconciling that decision. Often their current employer may sweeten the pot to convince the employee to stay on. Do not make the mistake of 'going dark' during this critical time, as it can leave a new hire feeling uneasy and/or change their mind about joining the team.

Instead, take advantage of this gap period to:

- Send a personalized welcome email with sincere gratitude that they have joined the team.
- Get a jump on new hire paperwork to free up time on the first day for more meaningful introductions and exchanges.
- Provide answers to questions they may have, such as where to go on day one, who to ask for upon arrival and what to wear.
- Organize security and tech details to avoid delays on the first day.
- Gather a few interesting facts about the new person to share with the team.
- Ask any team members who interviewed the applicant to reach out with congratulations and a warm welcome.
- Send the new hire branded material and/or reading material about the organization.
- Provide an orientation schedule or a 'day-one logistics' email.
- Invite the new hire to lunch on day one to relieve some first day jitters.
- Set up automated processes and templates to expedite the pre-hire communication, offer letter and subsequent onboarding messages for an efficient, streamlined process.

Set Clear Expectations

A common reason people quit within the first year is unclear expectations. It is vital, therefore, to spend sufficient time during the first few days or weeks with the new hire to review the job description, establish clear job expectations and outline how to succeed in the role. Be sure to describe what success looks like, and share any metrics used to measure performance—including any key performance indicators—so they understand what work volume and/or deliverables are expected and by when. In some cases, the easiest way to show the new hire what is expected is by having them shadow a teammate for on-the-job learning.

It's also important to provide milestones for the new hire to accomplish. Without these goals to help encourage and cultivate high-performing employees, it will be easy for them to become under-challenged or overwhelmed.

Check-In

It's wise to set up one-on-one meetings between the new hire and their manager, so the new hire has the necessary guidance and support while they are learning their role. The timing of these meetings may be more frequent initially, until the new hire gets comfortable with the duties of the role. These quick check-ins to uncover what is working well and what challenges they may be facing shows them they are already valued members of the team and that you are invested in their success.

It's vital that new hires understand that asking questions is not just OK, but welcomed and essential for learning about the organization's processes and culture. Make it clear there are no bad questions and identify where extra resources for self-learning can be found.

Quick Tip: Create a sense of accomplishment on the first day. While you may be tempted to go light on day one, assigning even a simple task that the new hire can accomplish will provide a boost of self-esteem associated with the work.

Probationary Review

The first 90 days of employment is known as the probationary period, and it is during this period that both the organization and the new hire get to see if the employment relationship is a suitable fit for both parties. From the organization's perspective, once the new hire has been given the required support and training to succeed, if for any reason they don't appear to be working out as anticipated, the organization can let the new hire go without notice, before the end of the 90-day probation.

Set the probationary review date in the new hire's and manager's calendar as part of the onboarding practice so this critical step is completed before the 90-day window is completed.

"Buddy" or Onboarding Colleague

Some organizations assign a "buddy" or onboarding colleague to each new hire to show the day-to-day operations and train the new hire on the practices, procedures and norms required to be proficient in the role. The buddy can also share information about the culture of the organization on a more personal level. This gives the new hire a point person to ask questions they may not have felt comfortable asking

Quick Tip: Make sure the buddy is a positive role model and someone who can willingly take on responsibilities to guide the newcomer as well as be a proud advocate for the organization. The buddy must not only be competent in the role but be patient and helpful with strong communication skills.



Varied Training Methodologies

Where possible, vary the methods of training instruction and information dissemination, so new hires do not get bogged down in a stack of long, dry manuals.

Instead, use a combination of job shadowing, written and verbal instructions, videos, training sessions/ workshops, observation, testing and templates/samples, etc. The new hire will appreciate having a variety of different resources and methodologies to help them absorb new information effectively.

Where possible, written processes of SOPs (Standard Operating Practices) are recommended, so the transfer of knowledge can be gleaned thorough source documents and not from tidbits of knowledge a senior employee may share. While mentoring from an experienced subject matter expert can be effective, it works best if supported by documented processes. Some organizations who rely heavily on long-tenured staff without documentation, may have difficulty in transferring the knowledge when necessary and should plan for succession and the transfer of knowledge.

The hiring manager is responsible to identify what skill gaps exist with the new hire and the expectations of the role and should schedule suitable training and development sessions to train the new hire accordingly.

Culture

While most of the emphasis is placed on the job-related aspects, it is important to include an introduction to the organization's culture in the onboarding process. It is recommended to choose a team member who is particularly passionate about the company culture to introduce and explain the culture and to help the new hire understand what makes the organization's culture unique.

People want to belong and feel part of something meaningful. Remember to include some social aspects to the onboarding plan. Include the new hire in upcoming events such as team lunches, social responsibility initiatives or volunteering events, sports or other activities.

Health and Safety

Every organization is responsible to ensure all new hires are adequately trained in safe work procedures and properly supervised when carrying out their duties. It's vital the onboarding program include safe work procedures and training on equipment and/or tools.

The new hire's supervisor must:

- Instruct employees in safe work procedures. Train employees for all tasks assigned to them, and check that their work is being done safely.
- Ensure that only authorized, adequately trained employees operate tools and equipment or use hazardous chemicals.
- Ensure that equipment and materials are properly handled, stored and maintained.
- Enforce health and safety requirements.
- Correct unsafe acts and conditions.
- Formulate health and safety rules and inspect the workplace for hazards.

It is vital to point out fire exits, evacuation procedures, emergency equipment and the location of first aid facilities or services. New hires must understand their own responsibilities, which include working safely, asking questions when direction is needed and following the health and safety requirements.

told they have the right to refuse unsafe work and encouraged to correct unsafe conditions, make suggestions and report any unsafe situation or incident to their supervisor.

Dividing the Onboarding Activities

Some organizations make the mistake of assigning all onboarding tasks to the person responsible for human resources, the hiring manager or, worse still, passing the new hire a stack of manuals. Instead, create an orientation schedule that lists all the various items to cover and assign accountability for these steps to various team members. This way, each employee can make their area impactful and the new hire will also make several new contacts right away. Imagine how much more inspiring it would be to have the owner or a senior staff member or another passionate team member review the company's mission, vision, values and history versus having the new hire read dry words on a page.

Quick Tip: **It's critical to connect the new hire's work goals to the broader organizational goals. Employees want to understand how they will be contributing to the overall direction of the company for a better sense of purpose.**

Customized Process

While we will share samples here, it works best if the onboarding process is customized for your organization. What makes sense for one role may not work for another. Similarly, the process may differ greatly for full time, versus part time or student roles.

Onboarding does not need to be a complex, technical process. Having a well-planned, comprehensive check list that identifies who is responsible for what and by when may suffice. This can be simply done in an Excel file or checklist that can be shared with the new hire, so they understand all the various items that need to be completed, by when and the person accountable to help them with that task. The tasks involving others can be sent as a reminder (i.e. the person responsible for IT can be sent a list of tasks to complete by what date for computer setup, email creating, access to network, etc.)

For larger organizations, a Human Resources Information System (HRIS) with an onboarding process can streamline the onboarding experience and may be worth the investment. Not all HRIS systems require a huge financial outlay, as some cloud services charge an affordable, monthly fee per employee. Individual work environments and budgets will dictate timing and activities, and their suitability for each workplace.

Onboarding Timeline

Onboarding is a shared responsibility between multiple roles and departments, with duties outlined below. Clear deadlines for each allow the new hire to cover all in progressive, manageable amounts.

	Pre-Arrival	**New Employee Orientation** (First Week)	**Department Onboarding** (First 3 Months)	**Ongoing Onboarding** (3 Months+)
New Employee	Sign and submit offer letter Review and sign acknowledgement re: company policies	Meeting with admin (forms, benefits, etc.) Review and submit necessary documentation Meet colleagues Learn the ropes	Complete all necessary training and onboarding tasks Be proactive in learning and asking questions Strive to achieve work deliverables	Share career aspirations with direct manager Identify ways to improve efficiencies Identify any training needs
Hiring Manager	Send welcome letter Advise details for first day and preferred attire Prepare schedule for first few weeks/ months Plan first assignment or project Assign an onboarding colleague Arrange lunch for first day Craft announcement email Arrange for key person to share company history, mission, vision and values	Send announcement email Introduce to onboarding colleague 1:1 meeting to review job responsibilities, how role fits in, explain onboarding process Explain first assignment or project Take to lunch or arrange Schedule any necessary training Arrange check-in meetings (weekly) Advise of any standard required team meetings Introduce to owners and senior team Identify the key contacts and set appointments Identify the 'customers' served by the role and share customer service standard	Review progress towards deliverables Meet regularly with employee to review performance expectations and issues/ challenges Provide feedback and support Liaise with onboarding colleague around performance Conduct probationary review after three months	Continue ongoing communication and positive coaching Conduct personal development plan and/or performance review
Human Resources (or manager)	Prepare orientation package Order any needed supplies Order business cards Arrange for office keys, security codes/fob and parking pass	New employee orientation (review org chart, culture, recap policies and procedures) Introduction to colleagues Health and safety orientation (first aid, emergency supplies, evacuation route, meeting place, etc.) Complete orientation checklist Provide and explain new orientation package Review phones and internal communications Explain benefits Document new employee records	Introduce to company social events Provide ongoing support to answer HR-related questions (e.g. benefits, vacations, policies, etc.) Person Responsible for IT	
Person Responsible for IT	Prepare computer and all necessary equipment Set up access to email and add to employee directory, group lists, etc. Set up access for company system Set up access to common printer	Ensure access is functioning properly Orient to require systems and how to access Set up email signature		
Onboarding Colleague	Plan to be available on the first day to meet employee and prepare materials to cover	Be a tour guide, provide introductions (bathrooms, coffee room, photocopier, supplies, break rooms, vending machines, mail service, etc.) Share neighbourhood info (restaurants, ATMs, transportation, etc.) Lunch on the first day Introduce first assignment or project Provide further information on policies, rules Provide resources where needed	Continue to connect and offer guidance regularly and help as needed	For mentors, hold employee accountable for identified goals and encourage development Continue to be a positive role model Person Responsible for Human Resources (or manager)

Keys to a Successful Onboarding Program

For an onboarding system to be successful, it will require:

- Discipline and commitment to carry out all elements of the program
- Enthusiasm to motivate and encourage the new hire
- Good communication between all parties
- Timely follow through from all involved to fulfil their roles in the process
- Time to devote to making it successful
- Measurement of program (i.e. success via turnover stats, scored survey of new hires for input on helpfulness of program)
- Continue to gather ideas from managers and new hires on how to make the program even better
- Confidence and buy-in from all players on the value of the process

Conclusion

This guide was designed to give you an overview of the importance of a well-planned, comprehensive onboarding process. Done correctly, it will help you make a great first impression with new hires and help them meet colleagues, integrate into various teams, understand their role and expected deliverables, embrace your company culture and accelerate their ability to contribute and become successful in their role.





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