

# 7 Ideas: Creating a Successful Employee Onboarding Experience

HR Exchange | Cornelia Gamlem and Barbara Mitchell | August 10, 2024

Starting a new job is a significant transition for employees, so make it a positive and memorable experience with onboarding. People's memories are defined by unique, out-of-the-ordinary moments. So, make your onboarding process extraordinary by taking a strategic look at how you welcome new employees into your organization. Doing so will get them engaged from the start.

## **Get the Manager Involved Early**

A successful onboarding process starts with the manager's involvement before the new hire arrives. There is a magical period between an employment offer being accepted and the first day of work. Employees conducting extensive job searches may still be in touch with other employers. Stand out so the employee is not tempted to accept another offer that may come along. A warm and welcoming message from the manager right away is impactful and will be noticed. This can be a phone call or an email or even a handwritten note depending on circumstances and culture.

## **Involve Other Team Members**

Treat onboarding as a welcoming process. Imagine getting an e-mail or text message from someone at your new organization who introduces themselves as a soon-to-be peer with visible excitement. Today's workplace structures vary among in-office, hybrid, and totally remote. That doesn't mean you can't do something personal. A link to a YouTube video introducing the team is easy to do, and it sends a powerful message along with building camaraderie early. The new employee will be comfortable reaching out to them with questions.

## **Plan and Prepare**

Recognize that there are many logistical and administrative issues that accompany bringing someone new into the organization. Preparation allows the details to be executed flawlessly. Otherwise, you could send a message that the new hire is not valued. That's not the way you want to get started.

Notify other functions—security, facilities, IT—as necessary and appropriate for your workplace structure. IT will need to make sure the appropriate technology is available along with providing instructions and points of contact. For work at a physical location—full time or hybrid—advise building security and/or facilities regarding any necessary badges, keycards, or keys needed. These may be necessary for remote employees if they will be coming to the location

from time to time. Don't forget payroll, accounting, or other functions like purchasing, depending on the employee's role.

If the employee will be working at a physical location, have their work area ready. If they won't have a dedicated work area, explain the set up in advance so they know what to expect. Plan to have a welcome gift—company merchandise or a book, as appropriate—that lets the employee know you're happy they joined. Yes, do this for remote employees as well.

Finally, communicate in advance any logistical information the employee needs to know about the physical location. If they are travelling from out of the area for the initial days of employment, make sure travel arrangements and details are clear. If they are local, provide details on parking, accessing the building, and where to go on arrival.

### **Leverage Technology**

A great deal of communication has already taken place. Leverage technology to transform your process. Text messaging can be used for those early welcoming messages. Texts can also contain links to information that the new employee needs to know—logistical information discussed above.

Then there are all the forms that must be completed. Intranets and employee portals allow access to this information before the first day of employment, and the opportunity to complete and sign documents as well. Employee portals are particularly helpful for benefits enrollment. Text messages can contain links to the information and reminders to complete the necessary forms.

Don't ignore generative artificial intelligence (AI). Investigate how it can simplify and automate administrative tasks associated with onboarding, like setting up accounts and profiles and completing paperwork automatically saving HR and employees time. Use AI to create checklists so new hires can keep track of what needs to be completed.

### **Devise a Meaningful First Day and Beyond**

Nothing makes a person feel special or welcomed more than a memorable greeting. A welcome email works in any situation. In physical locations, a welcome sign and a co-worker waiting for the new hire is a great touch.

Introduce teammates, either in-person or virtually. Depending on logistics, you could plan a breakfast or lunch—even if it's simply sending pastries or lunch to a remote worker's house. Plan to have a team meeting as a way to build rapport and trust.

Managers, use this time to review the job and its requirements along with expectations. Provide any department-specific information including a review of the department's mission and how it supports the overall organization. Communicate the protocols for contacting you or a team member if they have an emergency.

For on-site situations, who does the employee want contacted in an emergency involving him or her? Emergency preparedness protocols should be discussed. Facility tours are a nice touch, if appropriate for your workplace.

Consider ways to introduce new employees to the leaders of the organization early in their employment. This will depend on several factors such as the nature of the work, the organization's size, and most importantly the logistics of making it happen. Some examples include video presentations, either pre-recorded or virtual via conferencing, meet and greets—in person or virtual; or a more ambitious lunch with leaders, either one-on-one or group gatherings held periodically. The last two have to be carefully planned and it would be wise to have some guidelines around them.

### **View Onboarding as a 90-Day Process**

As mentioned above, onboarding doesn't end with the first day or the first week.

To be successful and meaningful, approach it as a process and not an event. Have formal checkpoints. Each check-in sends a clear message to the employees that the organization is focused on ensuring their success. This is another way that generative AI can help by creating tailored messages that are automatically sent to new hires at 30, 60, and 90 days.

After the first month (30 days), ask the employees about their experiences joining the organization and the team. What worked well and what could have been done differently?

At 60 days, do a check in and get a feel for how things are going. Are there any work or organization issues? Are there questions about job responsibilities and/or the team? This can give you insights about their perception of the culture and the work environment.

At 90 days, providing feedback and asking about challenges and successes forms the basis of an informal appraisal. But don't just focus on the present and the current job. It's a time to touch on career growth, sending a message that the organization is taking enough of an interest in them to begin preparing for their future.

### **Make Improvements**

Now that they've had some experience with your organization and the time to reflect, this is a good opportunity to get some feedback about the onboarding process. Ask what they wish they had known when they first joined that would have been helpful in getting a good start. As much thought as you put into your onboarding, you're looking at it from the inside. Get that fresh outsider perspective and use their feedback to improve your process.

A positive onboarding experience is a positive introduction to your organization for your new hires. It sends a powerful message about the organization's culture. Not only will the new hires be engaged, they are more likely to stay. Research shows that when onboarding is positive, new hire retention jumps by 82%. Isn't it worth taking the extra time to make it work right?