CPS HR CONSULTING

Best Practices for Employee Onboarding Programs

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Contents

Onboarding New Employees: A Model for Integrating and Engaging New Employees to Maximize Success

Most organizations understand that making a favorable first impression during the recruitment process is immensely important; however, it is equally important to reinforce that good impression during the first year of a new employee's tenure.

An essential component that is commonly overlooked for securing this favorable impression is a well-designed onboarding program. Onboarding is the process of successfully integrating and acculturating new employees into the organization (Robert J. Lavigna, IPMA-HR). The strategic use of an onboarding program can be one of the most effective ways that an organization can retain the top talent of the workforce after successful recruitment.

The importance and impact of an engaging onboarding program cannot be underestimated. Transitioning into a new organization can be challenging as the new employee acclimates to a new role, supervisor, coworkers, and the mission of the organization. When an employee is relocating to a new city and has myriad other outside adjustments, the transition is even more difficult. Incorporating a multi-faceted plan to introduce a new employee, guide them through this period and present them with information about the organization, team, and role is an effective way to enhance integration and engagement. Involving multiple employees of the organization at different levels can assist a new employee experience a seamless transition into the organization, the team, and their new responsibilities.

The impact of an effective onboarding program is directly correlated with the cost of hiring, rate of turnover, and long-term retention, according to the Society of Human Resources (SHRM, 2011). Research conducted by the Aberdeen Group in 2009 has reported that an effective onboarding program improved retention rates by 52 percent, decreased time to productivity by 60 percent, and increased customer satisfaction by 53 percent. Booz, Allen, & Hamilton (2008) found similar results on increased employee retention and decreased time to productivity, for which they found a correlation. In addition, they noted an increase in employee engagement with effective onboarding programs.

Most organizations have some form of onboarding practice in place for new hires, but many are lacking in key areas and can be improved through a thorough examination of current practice and involvement of stakeholders, and a recognition that the onboarding process does not end after the first week, or even the first month. The onboarding process should be in place throughout the first six months and include an evaluation process at the end to gather feedback.

Onboard → Engage → Retain

How Can Onboarding Best Practices Maximize your Workforce Potential?

Let's take a brief look at each of the elements positively affected by an effective onboarding program as noted by SHRM and Booz, Allen, & Hamilton.

TIME TO PRODUCTIVITY

Each employee's learning curve will be unique and will depend upon the employee's general background and specific experience in the field. It is in the best interest of both the new employee and the employer to get through this learning curve in the most efficient and effective manner as possible. The quicker an organization can prepare and position its new employees, the sooner the employees become productive. This can be facilitated through carefully planned practices that provide clarity about roles, responsibilities, and performance expectations, which can then translate into earlier job mastery.
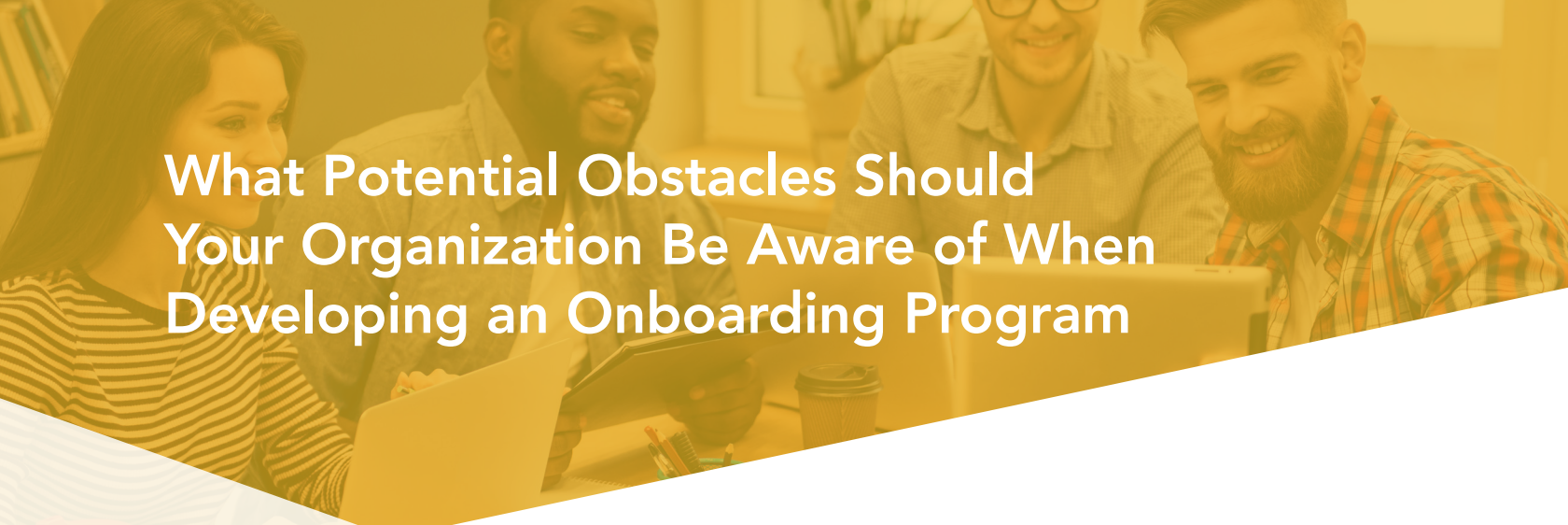
EMPLOYEE ENGAGEMENT

As previously stated, Booz, Allen, & Hamilton found that employees who reported having had a positive onboarding experience also reported high levels of employee engagement. Employees who report higher levels of engagement with their work tend to outperform employees who are less engaged. They also tend to go above and beyond to help their organization succeed in achieving organization-wide initiatives and objectives. This is the product of clarifying to the new employee their work expectations and the connection between their role and the overall mission of the organization.

RETENTION

Research conducted by the Aberdeen Group in 2006 showed that up to 90 percent of newly hired employees decide whether to stay or leave within their first six weeks. This finding is vital for organizations to understand because of the significant costs associated with replacing an entry-level new hire, and, of course, the even greater cost when replacing higher-level staff. The costs associated with turnover have been estimated between 30 and 50 percent of the annual salary of entry-level employees, 150 percent for mid-level employees and up to 400 percent for specialized, high-level employees (Booze, Allen, & Hamilton, 2008). Contrast a random and haphazard approach that sometimes occurs with a new employee versus a planned, thorough and supportive approach offered through a well-designed onboarding program. It is easy to intuit which approach will put the new hire at ease, provide a favorable impression, and validate to the employee that they have made a wise decision in their career path.

What Potential Obstacles Should Your Organization Be Aware of When Developing an Onboarding Program

There are challenges to address when developing a new onboarding program and being aware of them can help to ensure the process is successful and will encourage ongoing individual and organizational growth.

LACK OF CONSISTENCY IN ONBOARDING PRACTICES

Not having a structured program for supervisors and human resources to follow for onboarding new hires
One of the first issues that many organizations face when onboarding new hires is that they do not have a structured onboarding program to ensure all new hires experience a consistent and standardized introduction to the organization, the unit, and their job. There are many different ways to structure an organization's onboarding practices, but a certain level of consistency is essential to provide all employees within the organization with the same information and experience as they prepare to begin their new role. Many times, inconsistent onboarding practices do not happen intentionally, but rather, the lack of structure in the onboarding process in a fast-paced work environment results in an ad hoc approach and therefore, varied experiences for the new hires. Inconsistent onboarding practices can result in new hires not feeling adequately prepared by their supervisor and human resources, which can then lead to low morale in the early stages for a new hire.

Ineffective implementation of the onboarding practices throughout the organization
The development of the most effective onboarding practices for an organization requires all supervisors and leaders throughout the organization to buy into the new onboarding program. Inconsistent onboarding experiences can result from a small percentage of supervisors who do not utilize the best practices or tools put in place for the organization. Another common issue is when onboarding practices are inconsistently executed across different business units, teams, locations, etc. For these reasons, it is essential to include the stakeholders in the development phase of these new onboarding practices to acquire their feedback on all of the most common and large obstacles they face when bringing a new member into their team, and this most importantly will also help to create a strong sense of commitment to these new practices.

What Potential Obstacles Should Your Organization Be Aware of When Developing an Onboarding Program (cont.)

LACK OF COMMUNICATION

No clear understanding on who is responsible for performing which onboarding steps

Another common obstacle that arises while onboarding new hires for many organizations is not having a clear understanding of the various responsibilities throughout the onboarding process. There are many steps that need to be followed throughout the onboarding process, and it is important for the organization to clearly communicate who will complete each step. There are many involved parties who should have responsibilities with onboarding new hires, and they are not limited to just the supervisor and human resources, so it is crucial that everyone is aware of their responsibility and when it needs to be completed. If not, new hires may perceive the organization as unorganized because their supervisors or members of their new team are not sure who is supposed to perform necessary onboarding steps for them.

Lack of communication of the onboarding process to the new hire

Beyond communicating the onboarding process to the supervisors and any mentors, issues can also arise if the onboarding process is not explained to the new hire. It is important to present the steps of the onboarding process to new hires, so they have accurate expectations of how they will be integrated into their new organization. Accountability can be potentially lost if new hires are not made aware of the onboarding process because they will have no way of knowing if they are not receiving specific steps from the onboarding process in place. It is not uncommon for new hires to gradually realize that there are either resources or knowledge about the organization that they were never made aware of, which affects their ability to perform their jobs efficiently and productively.

LACK OF FOLLOW-UP EVALUATION OF THE ONBOARDING PROCESS

Lack of tools to evaluate whether the onboarding experience was effective

A common oversight that often occurs after developing and implementing new and improved onboarding practices is not evaluating the program to determine if it was effective. Every new hire has a unique experience when transitioning into a new organizational culture. Feedback is invaluable to help improve the onboarding process to ensure that it remains effective. In addition, there can also be a disconnect between Human Resources and management after the new onboarding program has been implemented. This can also result in the loss of valuable feedback that could be received from the managers and leaders who are performing these onboarding steps with new hires. Therefore, it is important to collect this feedback to get an accurate picture of the onboarding experience for new hires and from management carrying out these onboarding steps from start to finish.

> It is important to present the steps of the onboarding process to new hires, so they have accurate expectations of how they will be integrated into their new organization.

What Can Your Organization Do to Develop and Successfully Implement a Great Onboarding Program?

An organization has the ability to increase employee retention and improve employee engagement and performance by developing and implementing an effective onboarding program following current best practices.

In order to avoid the common obstacles previously detailed, there are steps to follow when developing and implementing new and improved onboarding procedures. By including all stakeholders and putting careful thought, time, and resources toward the development and implementation of the onboarding program, an organization has the opportunity to accelerate the time it takes for a new hire to become productive.

DEVELOPING AN EFFECTIVE PROGRAM

Following a simple process based on best practices will help you design an effective onboarding program within your organization.

Step 1	Step 2	Step 3	Step 4
Assemble a team	Determine the "what, how, who and when"	Implement	Assess
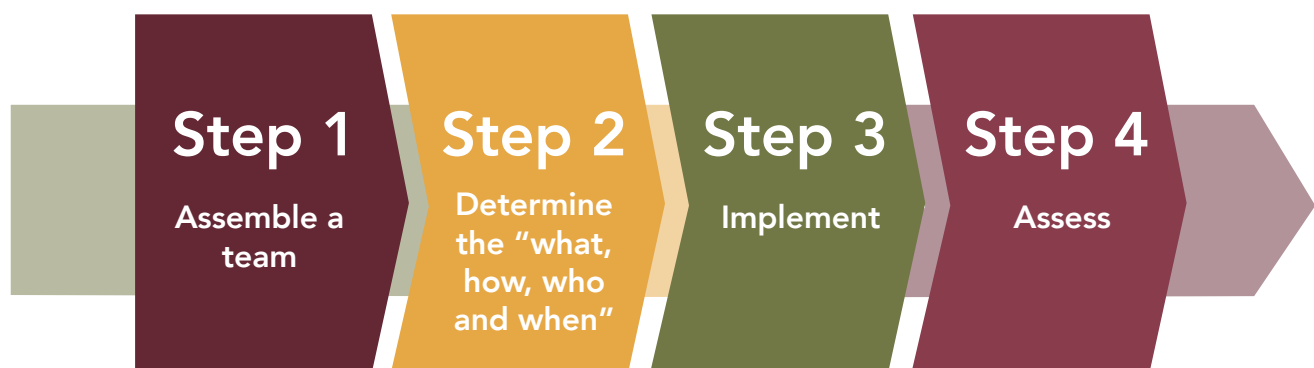
Step 1 & Step 2

STEP ONE – ASSEMBLE A TEAM

Begin the process of developing your onboarding program with a team comprised of employees with varied perspectives of the onboarding process. Include members from Human Resources, leadership and management – especially those who have a genuine interest in improving whatever your current process is. Add to this team recently hired employees, whose experience will be fresh. They will provide you with rich data on what worked, what did not, and what was missing during their recent onboarding experience. This collective can provide a holistic perspective from all sides of the onboarding process to ensure that any deficiencies in the current program are addressed, and that new ideas from all levels of the organization are considered.

STEP TWO – DETERMINE THE "WHAT, HOW, WHO, AND WHEN"

With an enthusiastic team, you are ready to begin generating ideas and deciding the substance of your program, including what information the new employee needs, who is best to deliver that information and in what format, and when in the onboarding process each element should occur.

What:

To decide what should be included in your onboarding program, start with a simple brainstorming session in which you solicit everyone's ideas as to what information and activities are important for your new hires to succeed. Begin at the organization level, move to the unit level, and finish at the job level. Think broadly about what is most helpful, including information from units that touch all employees. Then, use the following questions as you zero in on the most applicable elements:

- Will this help new employees acclimate and come up to speed more quickly?
- Will new employees feel better connected and informed?
- Will new employees understand the organization and/or their jobs more clearly?

You will also want to include elements that are preparatory, behind the scenes activities that the new employee will not be aware of, although they may be evident if overlooked, such as setting up the workstation or getting them access to electronic systems.

As part of this effort, consider administering a simple survey to employees hired within the past year or so to find out what was helpful, what was unnecessary – or shared with them too soon – and what additional information or activities would have helped them come up to speed more quickly. As you work through this process, you may decide that you may need variations of the overarching program for different levels of new staff, or perhaps for different types of positions. Use a "parking lot" as you think of specific ideas that are only appropriate or necessary for subgroups of new hires and focus on those items that are important to all your new hires. Revisit the parking lot after the primary onboarding program is complete.

Step 2 (cont.)

The content of your onboarding program will be unique to your organization. However, there are some standard items you will want to include. These run the gamut from the details of where to park to the organization's mission.

Consider the following as you generate your list:

- Mission, vision, values of the organization
- Purpose of the unit
- Colleagues names and their specific assignments/responsibilities
- What to expect the first day – where to park, appropriate attire, lunch
- Computer and phone set-up
- Systems and security access
- Employee preferences list
- Employee benefits training
- Sexual harassment prevention training

How:
Once you have decided on the content of your program, you will want to determine the optimal delivery method for each segment. Use a variety of methods, so your new employees are not overwhelmed by mounds of mind-numbing memos, informational sheets, forms to be completed, and policies to read. Think creatively! Particularly when it comes to the standard orientation session, there is plenty of room for the out-of-the-ordinary. Here a couple of interesting approaches we have seen:

- One agency pairs up its new hires and sends them on a treasure hunt to find individuals who perform specific tasks in each department, such as the person who books travel, and the employee who orders business cards. The new hires meet many new people along the way, as they inevitably must ask for help to find each person.
- Another agency used Legos, with designated pieces representing the various departments. As they talked about each department, the new employees added the pieces and ultimately assembled a car.
- For the other elements of your onboarding program, outside of orientation, consider videos, group meetings, one-on-ones, FAQs, electronic bulletin boards and even phone calls, letters and emails for the information you want the new employee to have prior to day one.

Who:
Next, it is time to make decisions regarding who is the most appropriate person to provide the specific information or perform the task. Be careful not to assign everything to HR or the supervisor. Use this as an opportunity to not just share information, but to connect new employees to others as well – both inside their new department and to the broader organization. Relationships build cohesion and a sense of belonging. Consider who the experts are on the various topics and how effectively they can share the information. Include in your plans a "buddy." This person can help tremendously in the acclimation and assimilation processes. Of course, make sure to select someone who is a great ambassador for the organization. In addition to being a supporter of the organization, they should also be in the same department as the new hire and be familiar with policies, procedures and cultural norms of both the organization and the unit. And of course, you will want to select someone who – as best as you can determine in advance – is a fitting personality match.

Step 2 (cont.)

As you formulate plans in this step, be sure to include top leadership during your onboarding process. Many organizations have a group meeting once a month or once a quarter where all new hires hear from the top-level executive, as well as from some or all department heads. If you are a smaller agency, consider hosting a casual lunch for leadership and new employees at the office.

When:
Your onboarding program will cover far more than one day or one week, and you will want to plan accordingly. We recommend breaking the onboarding time into five phases:

1. prior to day one
2. day one
3. first week
4. first month
5. first six months

This part of your planning requires discipline, as the tendency is to want to share too much, too quickly. Caution your hiring managers to adapt their parts of the onboarding process to the experience level of the new hire. Those who have long careers can be given more information earlier than others, but it's still important not to overwhelm the new employee with large project loads too quickly.

Prior to Day One

One of the most significant points to remember is that onboarding begins well in advance of the first day on the job. This first stage is when you can make a significant and positive impression while you reinforce to the new hire that he or she made the right decision to join your organization. You can do so through providing information about what they can expect their first day and week in the office, as well as by simply being welcoming and friendly. This does not require much effort. A couple of phone calls and sincere, welcoming emails from HR, the new supervisor and the assigned buddy are all it takes. The new hire will appreciate knowing whom to ask for when they arrive at the office, how to dress, and what to plan on for lunch the first day. At CPS HR Consulting, the new hire is asked in an advance email to share some of their preferences and likes. Armed with this information, some supervisors decorate the workspace with the employee's favorite colors, sports team memorabilia or have a stash of the employee's favorite treat waiting for them on their desk when they arrive.

Another critically important element of the first phase of your onboarding process is ensuring all necessary resources and equipment are set up. Remember, too, to arrange for access to all the systems they will need to use.

Caution your hiring managers to adapt their parts of the onboarding process to the experience level of the new hire

Step 2 (cont.)

Day One

As we all know, the first day on a new job is stressful and anxiety-inducing. When the brain is under stress, its ability to absorb information is limited, so plan this day carefully! Keep the information provided on this day simple. The more complex information can be shared later.

Avoid mind-numbing form completion and benefits explanations on the first day. Forms can be done in advance; benefits and compliance orientations can wait until later the first week. The employee is excited to be joining an organization and a team; meet that enthusiasm with an interesting and non-stressful day. Focus on touring the office, introducing immediate coworkers and other critical contacts, and acclimating to their workspace and key systems. Make sure their buddy is one of the first people they meet, and they know where he or she sits.

First Week

During this period, introductions can expand further to those departments, and the specific individuals within those departments, with whom the employee will have regular interactions. The supervisor can begin to familiarize them further with their role and associated expectations, as well as give them meaningful work. Also during this week, the supervisor should make contact frequently and give the employee plenty of opportunities to ask questions. Orientation meetings can be held, and be sure to have the supervisor forward invitations to recurring staff meetings and others the new employee will be expected to attend.

First Month

Specific onboarding tasks become less frequent after the first week, and the focus shifts to training (formal and on-the-job) and ongoing support and check-ins by both the buddy and the supervisor. The amount and frequency will depend on the individual and his or her confidence and experience level. HR has a role during this time as well with an informal check-in conversation at the end of the one-month mark to learn about how things are going. Asking the top three things the employee likes about the job and the top three challenges associated with the job and the organization can lead to a productive conversation and may yield information that will assist HR in a variety of ways. The conversation also sends a message to the employee that he or she has an additional support base.

First Six Months

Following the first month, check-ins should increasingly include feedback, while still offering support and guidance. The buddy should stay involved as well, although his or her role will likely diminish over time. In the best circumstances, the two parties have formed a work friendship that will endure and increase job satisfaction for both.

At the end of six months or thereabouts, administer an anonymous survey to all those who were hired around the same time to learn what has been effective and what can be improved. More about this under "Assess."

Step 3
Implement

Developing a checklist that lays out all the steps for each different stage of the onboarding process from before day one all the way through the new hire's first six months is necessary for effective implementation. This checklist should be an easy-to-use tool for managers, supervisors and human resources to assist them with onboarding new hires in a high-pace work environment.

This checklist from start to finish will detail all of the onboarding steps to ensure that the new hire receives all of their training related to their job duties, organization background and other information, such as benefits, security access, parking, etc. This tool will not only include each step necessary to successfully onboard new hires, but it will also list out who needs to complete which step and when the step needs to be completed. It is also necessary to consider the different types of staff (e.g., entry level clerical, senior professional level, management, etc.) within the organization to tailor these onboarding program steps accordingly. There may need to be exceptions to general onboarding steps if they do not apply to a certain level of staff or there may need to be specific onboarding steps that are inclusive to only certain staff to address their specific needs.

The onboarding checklist should be supplemented with an automated system to set reminders and to create a system of accountability. The automated system can be as specific as using some type of onboarding program or HRIS with the appropriate capabilities, a task management program or it can be as simple as setting up reminders in a Microsoft Outlook calendar to notify the appropriate employee when a step needs to be completed. This also creates a sense of accountability and allows for monitoring to ensure completion.

In addition to developing checklists and utilizing some form of an automated system, human resources personnel will want to follow-up with managers, supervisors, IT staff, and any other employees with an onboarding role to ensure that all of the onboarding steps are being completed by their deadlines. Remember that the goal is to facilitate a great experience for the new employee, and that a double-check may mean the difference between something important being omitted and ensuring that everything is in place.

Step 4
Assess

Putting forth the extensive amount of time, resources, and people needed to develop and implement the best onboarding program is a significant step in the right direction. It doesn't end there, though. Organizations and the individuals within them are constantly evolving, and for this reason it is essential that the onboarding practices are evaluated to ensure they remain effective for the new hire and those involved in the executing the program. The most effective way to accomplish this is to seek feedback from those involved at various checkpoints in the process and beyond.

This can be accomplished by developing an onboarding evaluation survey to be administered to new hires after they have completed their first six months. These surveys need to ask questions that evaluate each phase of the onboarding process – even beginning with the application process if you wish. The purpose of these questions is to determine whether each step was performed and what its level of effectiveness in meeting the objectives. Exercise care to ensure that the questions are worded in a clear and concise manner. Avoid asking more than one question at a time. Use the results to consider changes to the program. When possible, make the surveys and their results anonymous, as this will help to gather honest and objective feedback from your new hires. However, not all organizations hire enough employees throughout the year to maintain a completely anonymous survey. A method to address this obstacle would be to have a senior human resources employee, manager or director hold a one-on-one meeting with the new hire to ask the questions that would have been in the survey. Provide appropriate reassurances about the way their feedback will be used. Be sure to seek input from those assigned onboarding tasks as well to learn about ways to make the process easier for them as well.

Consistently evaluating the onboarding experiences from new hires on a yearly basis can help organizations maintain the best onboarding practices to fit their needs and make sure that they are setting up their new hires for success in their new roles.

Concluding Thoughts

In today's tight labor market, when employees know they have multiple options for employment, making a good impression and preparing your new hires can provide the competitive advantage you need to retain those you have just searched so hard to find.

While it requires an investment in time for your staff, the benefits to the new employees and the organization – reduced time to productivity, increased employee engagement and ultimately, improved retention – make it a worthwhile effort. By following the steps outlined and watching out for the pitfalls, you can tailor a program specifically to your organization's needs and culture.

About CPS HR Consulting

CPS HR Consulting is a self-supporting public agency providing a full-range of integrated HR solutions to government and nonprofit clients across the country. Our strategic approach to increasing the effectiveness of human resources results in improved organizational performance clients. We have a deep expertise and unmatched perspective in guiding our clients in the areas of organizational strategy, recruitment and selection, classification and compensation, and training and development.

To learn more about developing and implementing an onboarding program in your organization, or for any other HR needs, reach out to us at:

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