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FYI

HIRING

Onboarding

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Summary:

Organizations spend a great deal of time, effort, and money recruiting and hiring new employees. Too many organizations feel the process is complete. Once the new person comes on board. Of the thousands of employees who experience their first day on a new job on any given day, many receive only a cursory welcome and a fleeting introduction to their new company and their new job responsibilities. High turnover and reduced productivity are often the result.

This FYI provides information for use in creating or improving an organization's onboarding process. While there is no perfect plan that works for all, this FYI provides key steps to create an effective process that supports the organization's business needs.

For additional resources, please see page 7.

Important Notice:

The information provided herein is general in nature and designed to serve as a guide to understanding. These materials are not to be construed as the rendering of legal or management advice. If the reader has a specific need or problem, the services of a competent professional should be sought to address the particular situation.

I. Introduction

The first day on a new job can be filled with anxiety as new employees face the unfamiliar. Yet, new employees also feel a sense of anticipation and excitement related to the new job challenges. Organizations can gain the commitment of new employees right from the start by minimizing their anxieties and capitalizing on their excitement. Unfortunately, many miss this opportunity. Often, a great deal of time and money goes into recruiting and hiring new employees, but little effort goes into orienting the employee. Consequently, the seeds of dissatisfaction and turnover may be planted.

A well-planned, well-executed orientation and onboarding program can enhance employee perceptions and lay a foundation for a positive, long-term relationship. A new concept to consider is that the onboarding process is a continuation of recruiting the new employee to the organization.

A. ORIENTATION VERSUS ONBOARDING

Orientation in its traditional sense is a one-time meeting with an HR professional where the employee completes paperwork and receives information about the organization. Onboarding, on the other hand, is an ongoing developmental process designed to include interaction, information, and instruction to the new employee. The process begins before the new employee starts work and may continue well into the first year of employment. This long-term approach to onboarding provides pertinent information at the appropriate time. Frequently, the terms orientation and onboarding are used interchangeably, but the concepts are very different.

The benefits of onboarding are significant. Although onboarding requires more time and effort, the new employee experiences a well-conceived approach to obtaining the information needed to get up to speed as quickly as possible. Onboarding provides the new employee with:

- The right amount of information,
- At the right time
- In the right way
- By the right person

B. NEW HIRE INVESTMENT

Creating a work environment where employees want to stay is important because of the considerable monetary and other resources expended in hiring and training them.

One way organizations can avoid unwanted turnover and maximize their investment in new employees is with a well-designed onboarding program. An effective onboarding process can be used to motivate employees, prevent performance problems, and reduce absenteeism and turnover. Such a process capitalizes on each new employee's enthusiasm and keeps it alive once work begins. A motivated, satisfied worker is more likely to be successful. Success for the employee means success for the organization. Onboarding allows employees to contribute more quickly.

C. BENEFITS OF ONBOARDING

Ease the Transition and Build a Positive Connection: Organizations need to make newcomers' experiences with the company as positive as possible so they will settle in quickly and want to

stay. Employees usually begin new jobs with enthusiasm and are eager to excel. Employers can build on that enthusiasm by creating a sense of commitment, pride, and belonging, both before and after the new employee begins work. The ideal is to keep that level of enthusiasm and commitment alive throughout the entire period of employment. This means continuing to pay attention to new workers beyond the first day or first week.

Shorten Learning Curves: To reach a maximum productivity level as quickly as possible, new employees need resources, information, and training to help them master their job responsibilities. Doing it right the first time eliminates the potential for costly mistakes. This means giving new employees the appropriate training, help, and support needed to make a quicker adjustment. Initiating early and regular performance monitoring and feedback is also required so employees clearly understand expectations, stay on target, and have ownership and responsibility for their work. The immediate supervisor is primarily responsible for this, but assistance can also be provided by co-workers, mentors, HR professionals, IT staff, or others.

Reduce Turnover and Performance Problems: A certain amount of turnover is needed in an organization to eliminate incompetence, allow the entry of new people, provide advancement opportunities, and contain costs. High turnover; however, can cause productivity to drop while recruitment and training costs increase. Managing turnover is important to retain the employees you really want to keep.

D. STEPS TO DEVELOPING AN EFFECTIVE ONBOARDING PROGRAM

Since no two companies are the same, no two onboarding programs should be the same either. You should customize your program to fit the needs and culture of your own organization. This should not prevent you from looking at what other companies are doing to find ideas that might work for you and to provide some guidelines to get started.

An effective onboarding program needs to be interactive. It should focus on addressing the *needs of the company* as well as the *work-related needs of the new employee*. The company is most interested in performance, productivity, profitability, and avoiding turnover and labor problems. The employee is interested in the total rewards provided by the organization, the technical aspects of the job, company standards, expectations, prospects, norms, traditions, policies, as well as the social behavior of the organization (e.g., conduct, interactions, etc.).

Because of the typical diversity of new employees, onboarding should accommodate differences in intelligence, education, learning styles, and work experience.

E. COMMON ONBOARDING PROCESS DESIGN QUESTIONS:

- Where do we start?
- How long will it take?
- What should we include?
- What are the demographics of our participants/new hires?
 - Generational differences
 - Technical capabilities
 - Access to computers or computer terminals
 - Language considerations
- How can we measure the effectiveness of the program?

II. Steps to Developing an Onboarding Process:

A. IDENTIFY THE OPPORTUNITY

First, decide if there is an organizational problem or opportunity like high turnover or a cultural shift that could be positively impacted with an effective onboarding program.

Some questions to ask are:

- Why have an onboarding program?
- Is there a problem we are trying to solve?
- What are we trying to improve or build on our current program?
- What do we want to achieve with this program?

Collect Data

An influential onboarding program is designed to meet the specific needs of the top management, new employees, and their immediate supervisors. By soliciting input from all of these groups, their ideas can be incorporated into the design or modification of the program. Another key group is the recent hires who can give feedback on their recent experience. Effective data collection methods include:

- Personal interviews
- Small group discussions
- Questionnaires
- Exit interviews

Questions can include:

- How would you evaluate the effectiveness of the onboarding process?
- What do you think are the strengths of the current onboarding process?
- What changes would you recommend to improve the process?
- In looking at how our current onboarding process could be more successful, what do you think: Needs to start happening? Needs to stop happening? Needs to be done more? Needs to be done less?
- In what way do you see onboarding as a valuable tool?

A summary sheet can then be compiled to condense and document the results of the system evaluation. You will use this document to redesign or develop the onboarding program. It is a subjective encapsulation of all the data you have collected about the opinions and values of others in the organization.

B. DEFINE THE PROGRAM OBJECTIVES

Once you have identified the problem, need, or opportunity and you are clear about what you want to achieve, you can define the program objectives. This is a vital step since the program will be designed around accomplishing these stated objectives. Organizations can evaluate the program's success based on how well these objectives have been met.

Common onboarding program objectives are:

- Make the employees feel welcome and at ease in a new work environment
- Improve communications
- Give the new employees an understanding of their jobs and company expectations about job performance
- Present the company history and objectives
- Communicate personnel policies, benefits, and work rules
- Promote community and public relations
- Answer questions of the newly hired employee

- Facilitate employee development
- Reduce turnover
- Reduce learning curves

C. OBTAIN ORGANIZATIONAL SUPPORT

1. Sell the Plan to Top Management

It is critically important to gain the support of top management and for them to actively demonstrate their commitment to the onboarding program. Involve executives and management as much as possible in both the program development and the program itself.

One way of gaining management commitment is to accumulate information to help sell the plan and its benefits to the organization. Key areas to cover include:

- Purpose and need for the program including measurable results and benefits to the organization
- Project procedure including timetables and target dates
- Who needs to be involved and what way they will contribute to the project
- Budgetary needs including allocation of time, materials, training, and external resources
- Progress reports to keep management informed and solicit their input on any changes

2. Gain the Support of Supervisors

Supervisors may not be aware of how crucial their role is in orienting new employees. They are often preoccupied with their day-to-day responsibilities of meeting deadlines and improving productivity. Consequently, newcomers may not receive adequate orientation to the job or to the department. Therefore, it is important to develop an onboarding program that supervisors can understand and value, and to which they are committed. This can be accomplished with effective communication and training.

3. Signs of Management Commitment

- Willing to participate in development of program
- Soliciting input from employees
- Communicating the program positively to employees
- Using resources available

D. DEVELOP PROGRAM CONTENT

The content of your onboarding program should support the predetermined program objectives. It should also be based on a thorough assessment of organizational needs and resources. When considering content, go beyond paperwork and focus on an integrated approach involving the following areas:

- Ensuring Compliance (e.g., I-9)
- Building Context (e.g., organization's mission, vision values, culture)
- Creating Connections (e.g., to the manager, co-workers, etc.)
- Supporting Job Success (e.g., setting expectations, providing training and tools, scheduling regular check-ins)

1. Utilize Needs Assessment

Use the data gained from your system evaluation to decide what to include in your program. Look at what managers determined were their priorities for new hires. Explore those elements

identified by employees as being important to the onboarding process. Also, review your discussions with top management. They too, may reveal additional organizational needs on which the program should focus. Consult your "ideas" file, containing examples of other orientation programs.

2. Evaluate Resources

Much of the content will depend on the budget, time, and staff assistance available for preparing and producing materials, training participants, and training new employees. The budget should be considered a nominal cost compared to the potential benefits of the program.

3. Identify Materials

Designing the program includes designing relevant new materials, or updating and upgrading existing material. Seek the help of others in the organization in identifying existing material that can be used effectively in familiarizing employees with your company. The materials need to be current and the language reviewed for potential liability. This might include:

- Handbook
- Policy and procedures manual (supervisors/managers)
- Mission/vision/values
- Annual report
- Newsletter
- Safety or other bulletins
- Promotional pamphlets (on organization and products)
- Organizational charts
- I-9, W-4, group benefit enrollment forms, confidentiality agreements

4. Checklists

Checklists can be a useful method of making sure the required onboarding activities take place. They can be designed for anyone involved in the onboarding process. Usually items are checked off as they are done and when the list is completed, it is returned to the Human Resources Department to be filed.

5. Timing of Information

Much of the onboarding process involves conveying information to the new hire. When orientation is merely a one-time event (rather than a process), the new employee receives no information, gets too much information at one time, or receives conflicting information. Because there is so much the new employee must absorb, the most effective onboarding programs stagger the process to avoid information overload. Only the most essential information is given on the first day and additional information is then presented over a scheduled period of time. Formal onboarding sessions should be limited to what the employee can digest and retain at one time. A two-hour maximum per session is suggested.

This process can begin with sending out materials to prospective employees or new hires before they begin work – pre-boarding. The goal of pre-boarding is to continue the enthusiasm and eagerness of the new employee to learn about the organization and the new position. This is also a great time to send information on the expectations on day one and week one (where to meet, who to meet, dress code, meals, parking, etc.).

Teach the basics before anything else. People become productive sooner if they are given time at the outset to learn the basics - to establish a foundation. They need to know about the how, where, and why of getting things done before actually starting their regular job

assignments. Try to provide the information just prior to the time the person needs to use it. For example, if employee benefits do not become effective until 90 days after hire, planning a benefit briefing session within two to three weeks of the benefit effective date will assist the employee to better understand the process. Plan carefully what information should be given on the first day, in the first week, etc.

6. Presentation Methods

Ideally, the new employee's manager and an HR representative should not be the only people involved in acquainting a new employee with the company. Consider scheduling time with a variety of individuals within your organization to assist with the onboarding process. Your executive team can assist by explaining the organization's mission, vision, and values to a new employee. An IT professional can assist in training the employee on your telephone and computer systems. Additional people frequently used during onboarding are risk managers or safety professionals, accounting staff, mentors, peers/coworkers, or other managers.

If you include presentations, try to find presenters who are the most knowledgeable and enthusiastic about the function. Be sure to give the person feedback on the presentation.

Using different methods of presentation can appeal to different learners and generations. Get Creative! For example, methods can include:

- Personal presentations
- Written materials
- Conference calls
- Web-casting
- Posters/pictures
- Videos
- PowerPoint
- CD/DVD
- Interactive software
- Pod-casting
- Virtual tours
- Web-based learning

The most successful onboarding programs include using different methods of learning, spread over a longer period of time, and involve different people from various parts of the organization to spread the organization's message.

E. IMPLEMENT THE PROGRAM

Implementation of a new system, or revision of an existing program, involves change. The support of those involved will depend on how well they understand how the change will benefit them. They should have a thorough understanding of how the process works and the importance of their individual roles in achieving the program's objectives. Training should be planned for all of those involved.

It will take time before supervisors and others become skilled at orienting new employees and the positive results of the program can be seen. Therefore, on-going communication about progress is critical in the implementation stage to maintain interest and support. Inform current employees of the proposed timetable. When will the new orientation program begin? When will training take place? Who is expected to participate?

You can provide information on the program to current employees and give employees the opportunity to ask questions and make contributions to the program.

F. EVALUATE THE PROGRAM

Once the new or revised onboarding program is in place, how will you know if it is successful? You should monitor your program and measure your progress against the goals you have set. This is an ongoing process reflecting the changing nature of the organization.

Program evaluation can be used to determine the program's effectiveness and needed improvement to accomplish the pre-stated objectives. Information gathered from the evaluation may even indicate a need to change the original objectives.

III. Conclusion

A successful onboarding program can be a valuable tool in promoting employees' belief in the organization and their willingness to exert effort on its behalf. A carefully planned onboarding process, supported by everyone in the company, can be designed to keep employees motivated and informed throughout their employment. It can combine the needs of the organization with the needs of the individual to achieve the goals and success of both. However, that synergy does not happen overnight; people need time and opportunity for the development of trust, communication, interaction, and commitment. The onboarding program provides the framework in which this can happen. If it is successful, employees have a better opportunity to become more knowledgeable and competent. As a result, they may move toward a total commitment to the organization. This in turn leads to continuing growth, success, and self-renewal for both the organization and its employees.

IV. MSEC Resources

Seminars:	Orientation/Onboarding: Building a Positive Connection from Day One
	Retaining and Engaging Employees: What Employees Really Care About
	Fundamentals of Human Resource Management
FYI	Staffing- Employee Retention
FYI	Staffing- Retention and Turnover FAQs
FYI	Staffing- Hiring Checklist
FYI	Staffing - Applications and Resumes – Review
FYI	Staffing: - Proper/Improper Inquiries in the Pre-Employment Process
Forms	MSEC Human Resource Forms Sample Packet - 2.2, Employment Checklist

Onboarding Checklist - Human Resources

Employee _____ Start Date _____

Position _____ Department _____

Company Information/Overview

- | | |
|----------------------------------|-----------------------------|
| _____ History | _____ Operations/Facilities |
| _____ Mission/Vision/Values | _____ Recognition Program |
| _____ Traditions, Customs, Norms | _____ Advancement |
| _____ Organization and Structure | _____ Opportunity |
| _____ Products/Markets | _____ Employee Handbook |

Key Policies and Procedures

- | | |
|------------------------------------|-----------------------|
| _____ Equal Employment Opportunity | _____ Problem-Solving |
| _____ Sexual Harassment | _____ I-9 Form |

Compensation

- | | |
|-----------------------------------|---------------------|
| _____ Pay Days | _____ Working Hours |
| _____ Pay Rates and Ranges | _____ Holiday Pay |
| _____ Overtime/Shift Differential | _____ Deductions |
| _____ Performance Evaluation | _____ Expenses |

Benefits

- | | |
|--------------------------------------|-------------------------|
| _____ Insurance | _____ Holidays |
| _____ Medical/Dental Plans | _____ Vacation |
| _____ Retirement Plans and Options | _____ Leaves |
| _____ Training/Tuition Reimbursement | _____ Recreation/Social |

Safety and Security

- | | |
|-----------------------------------|------------------------------------|
| _____ Security/Keys/Combinations | _____ OSHA Regulation |
| _____ Fire Prevention and Control | _____ Workers Compensation |
| _____ Drug and Alcohol Policy | _____ Inspection and Search Policy |

Tour of Company/Facilities

Signature _____ Date _____

New Employee Onboarding - Supervisor's Checklist

Employee _____

Start Date _____

Position _____

Department _____

Preparing for a New Staff Member:

- Alert staff members in work unit
- Prepare newcomer's workspace, supplies, and equipment

First Day on the Job:

- Welcome new employee
- Get acquainted with new employee
- Introduce to immediate colleagues

New Employee Reports to Human Resources Department:

- Complete employment forms
- Schedule corporate orientation

Departmental Information Packet:

- Work unit organizational chart with names of co-workers
- Programs and procedures, telephone directory, brochures, staff handbook, newsletter, annual report, manuals
- Directory of common terms and acronyms

New Employee Reports to Supervisor in Work Unit:

- Provide survival information:
- Job outline - duties and responsibilities
- What is expected - performance and quality standards
- Departmental policies
- Hours of work - overtime, lunch, breaks
- Pay rate, timesheet/time clock, payday, direct deposit
- Sick policy - calling in sick, accrual of sick leave
- Vacation policy - how many days, when scheduling
- Customs - birthdays, holiday parties, sports teams, activities committees, suggestion box
- Other; e.g., dress codes, uniforms

New Employee Onboarding - Supervisor's Checklist (Continued)

Tour of Work Unit and Survival Information:

- Tour of work unit
- Limited introductions to coworkers
- Restrooms, cafeteria, vending machines, employee entrance, parking lot, public transportation, mail pickup
- Locations of nearby departments
- Bulletin boards and other information sources
- Other

Operation of Equipment and Procedures:

- Explain/demonstrate:
- How to operate photocopier and other office equipment
- How to order equipment or supplies
- How to use telephones; how to answer inside/outside calls
- How use the computer and software
- How to operate work machines/equipment
- Injury reporting

Beginning Work:

- Assign mentor for lunch, breaks, instruction, questions
- Be available to answer questions, check work

At the End of the First Day, First Week, First Month:

- Answer new employee's questions
- Review information and policies or procedures
- Give encouragement and reassurance
- Express confidence in new employee

Signature _____

Date _____

Pre-Employment Kit

Items to Consider:

- Brief history of the company
- Names and titles of key executives
- Performance appraisal information
- Compensation information
- Job description
- Work hours
- Benefits
- Vacation policy
- Scheduled holidays
- Leaves
- Newsletter
- Annual report

Relocation Packet: (if applicable)

- General information about the city
- Address and telephone number of Chamber of Commerce
- Address and telephone numbers of reputable realtors
- Address and telephone numbers of job service centers (for spouse)

Details for the First Day:

- What time to arrive on the first day
- Where to park
- What door to enter
- Where to report
- Who to report to
- What to wear
- What tools or equipment to bring
- What documents to bring
- Lunch information
- Finish time
- Timetable of first day

Other:
