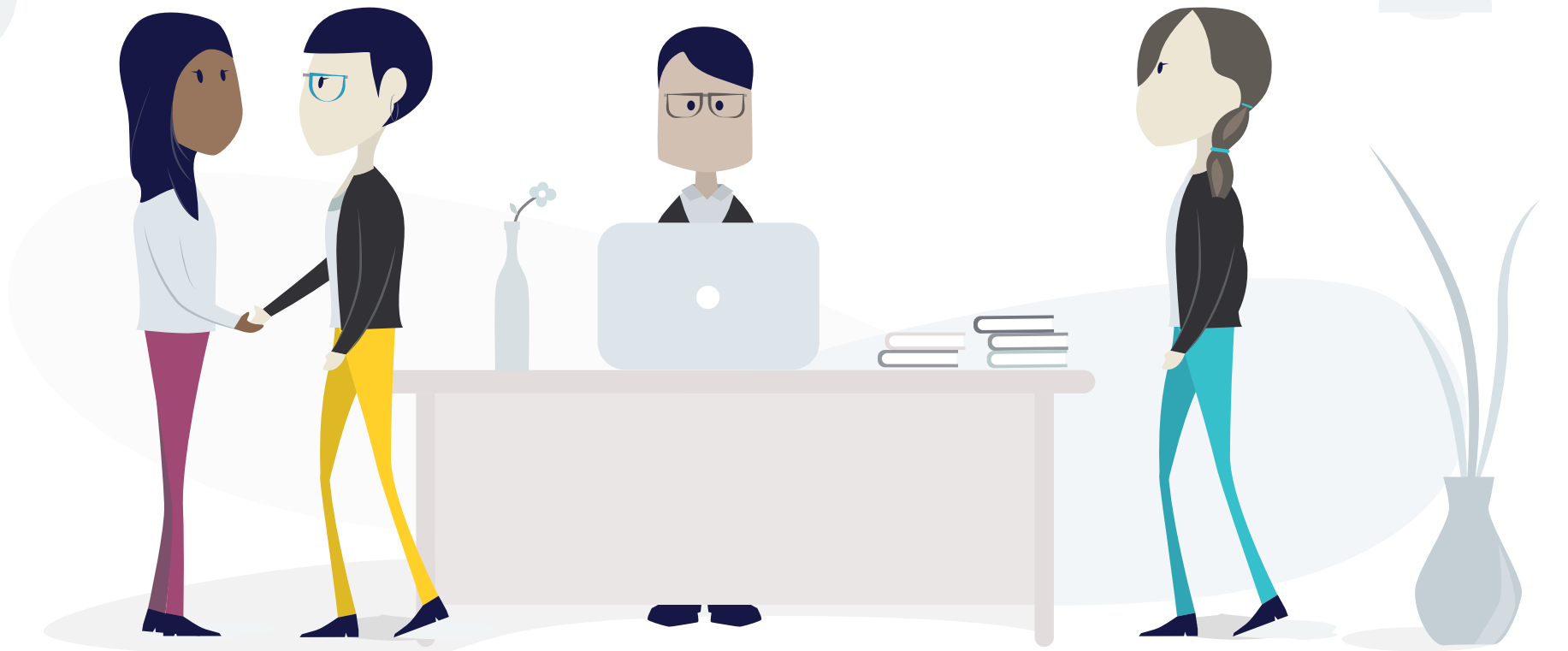# MCQUAIG PRESENTS

THE QUICK GUIDE TO ONBOARDING

Introduction

Talent acquisition is not a fast process. It takes time to source candidates, conduct interviews, and negotiate job offers. Most hiring managers understand the importance of each of those steps in the hiring process and take the time to do them well. But once the candidate signs on the dotted line, there's often a sense that the process is over and that can cause problems with your brand-new hire.

Onboarding is a commonly talked about strategy but when it comes time to actually implementing it with a new hire, many companies fall short. In fact, only 12% of employees believe their companies onboard well.[1] That's a shockingly low stat when you consider how much research has been done proving strong onboarding helps improve retention, employee engagement, and productivity, all of which impact a company's bottom line.

So why does a gap exist between a successful recruiting search and a poor onboarding experience? And better yet, what can companies do about it? Within this eBook we'll explore the stages every onboarding program should include and a collection of strategies to implement at each step. Having a formal onboarding program in place will help you integrate your new hires more quickly and pave the way towards creating a loyal workforce that's both happy and productive.

Did you know?

A great onboarding program can improve employee retention by 82%[2]

Let's talk numbers

It's easy to say every company needs onboarding but do the numbers support it? Is the time and energy you'll spend onboarding your new hire worth it? Looking at the research, we can see:

- On average, employers spend $4,000 and 24 days on a new hire[3]

- 69% of employees are more likely to stay 3 years if they have a great onboarding experience[4]

- 54% of companies with good onboarding report higher employee engagement levels[5]

- 77% of employees with formal onboarding meet their first performance review targets[6]

Stats like that certainly paint a picture of the importance of spending the time upfront to set your new hire up for success.

20%

80%
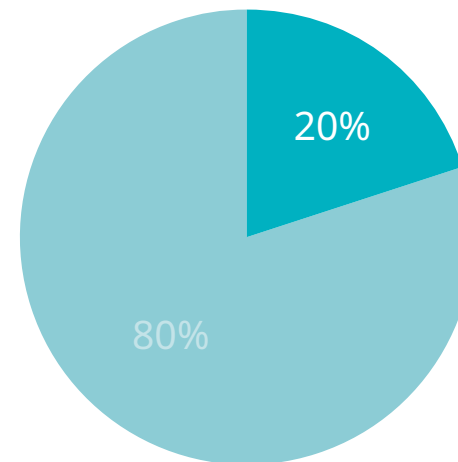
20% of staff turnover happens within an employee's first 45 day[7]

How long should onboarding be?

The most common question about onboarding is how much time you should spend on it. The answer varies depending on the company and the amount of knowledge a new hire will need to acquire. Some companies have onboarding programs that span years but usually those are very advanced or technical positions. Most onboarding happens within three months to a year and often gets broken down into the following stages:

1. Before day one

2. Day one to week one

3. Week one to three months

4. Three months to a year

Part of creating a strong program will be deciding how long of an onboarding period you'll require but make sure you don't fall into the trap of thinking everything can be accomplished quickly. Nearly half of hiring managers report their onboarding program is accomplished in a week or less but think about what that really means.[8] Is it reasonable to expect someone brand new to your company to understand everything about their role and organization in their first 5 days? Or is it more likely that your new hire will be overwhelmed and only retain a fraction of what they learn?

When it comes to successful onboarding programs, more is better. So don't try to condense everything into the first day and instead take a longer term approach to training. You'll find the extra time is well spent when it produces an employee who wants to stay with the company, instead of one who heads for the door within their first year.
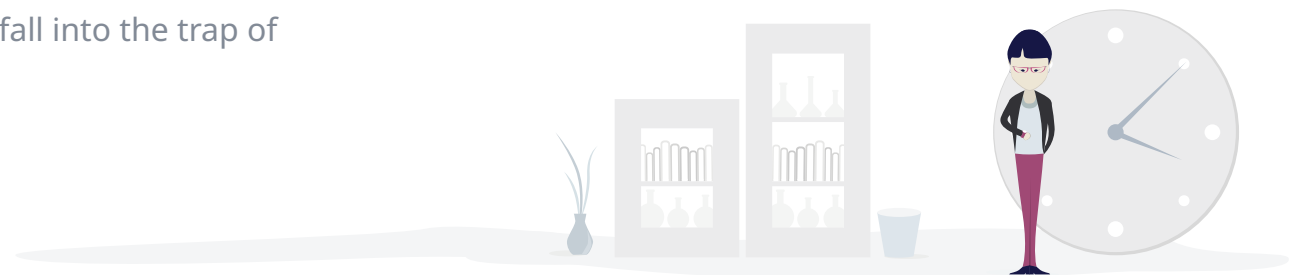
Before day one

Before your candidate shows up on day one there are a few tasks you can accomplish. Getting these out of the way before your candidate arrives can help ensure they have a smooth, organized start.

Build a plan

Once your offer has been accepted, it's time for you to sit down and come up with an onboarding plan. **Some companies have formal programs that always include the same elements and others have training modules more specific to the role that a new employee will be moving into.** Figure out what your new hire will need to learn and then start putting the building blocks together. What are your goals for their first week or month? How will you measure their learning and identify if there are any gaps to address? Figuring out your metrics, check- in points, and training approach in advance will lead to an easier, and hopefully more successful, onboarding when your new hire shows up for work.

Create an onboarding team

Who will the employee be training with? There could be many people involved depending on the role or seniority level you're onboarding. For example, HR might have a session on benefits or IT may have one on technology. The CEO might have a welcome message or a manager might plan a team lunch. **With multiple schedules to balance, make sure everyone knows in advance what their role is and when and where they'll have to be when the employee arrives.** It can be useful to give everyone involved a packet about the employee such as their resume, LinkedIn profile, website link, assessment results, or any other relevant piece of information so everyone can be prepared in advance.

Set up their desk

Don't wait till you see a new hire to remember you needed to wipe their laptop's hard drive or you forgot to order that extra screen from IT. **Make sure all the technical aspects of the role are set up before an employee comes to work.** Passwords should be waiting for their arrival, along with notebooks, pens, and anything else they might need on their first day. If you have any company swag like t-shirts or water bottles to add to their set up, all the better. This basically boils down to just being prepared. The last thing an employee wants to do is sit twiddling their thumbs while they watch someone set up their desk. This also sends a strong message that they weren't important enough to think about before their arrival and who wants to feel like with a new job?

Print business cards

Seems simple right? Some companies wait till after an employee's probation to print these, but business cards aren't expensive and the message they send can be loud. **Starting on day one with an employee's name already at their desk or cards on their table is a good way to signal to that they are welcome and necessary.** It helps new hires feel anchored to the company and gives a sense that this role is permanent rather than temporary. New hires often feel off-balance on day one so it's nice for them to arrive to something tangible that shows they have an important role to step into and that the company is glad to have them there.

Day one through week one

An employee's first day should be about being welcomed, rather than intensive learning. Use their first week to create a positive foundation for the new hire and bring them into the community.

Start a little later

The worst first impression to make would be a new hire showing up early before their manager has arrived. Or showing up while their managers is getting organized for the day themselves. **You don't want to make a candidate wait around as their first introduction to the company.** They won't know where to go or what to do to fill up the time until the manager is ready for them. By letting them come in an hour later, you create the space needed for HR or managers to get ready, check their email, and start their day before the employees arrives. This helps everyone feel fresh and prepared for when the onboarding really starts.

Create an onboarding schedule

Using your onboarding plan from the pre-boarding phase, create a schedule the employee can have and follow over their first week or two. **Pre-book meetings for them with key team members or department stakeholders instead of leaving it to them to reach out.** Schedule training sessions at reasonable intervals making time in between to cover any questions or allow for small breaks to help improve memory and retention. And make sure someone is taking them out to lunch on their first day. Employees might not know the area or might not have brought food so it's a nice gesture from a manager to treat them to a meal.

Job shadowing

If possible, it's a great idea to have a new hire shadow someone already in the role they'll be entering. Or, if they aren't overlapping with the person they're replacing, have them shadow a peer or even their manager for a few hours so they get a sense of the pace of the office and the various roles and duties others are tasked with.[9] **This helps give them a better frame of reference for where they'll fit into the team and what sort of projects are on the go at any given time.** It also helps with learning as we retain knowledge better when we are hands on, rather than being talked at.

Review the role

At some point during a new hire's first week, time should be carved out for them to meet one-on-one with their manager. Instead of making awkward small talk, use this time to go back into the original job description. Remind the employee about the key requirements of the job and how and when they'll be measured on them. Discuss what office life is like and what behaviours are, or aren't, acceptable within working hours. Ask them if they have questions and if they have a few, respond in person and also send them an email follow-up that they can refer back to. **Use this time to give your new employee a sense of the expectations you have and the timelines around when check-ins will be over the next few months so they know what to expect.**

Between week one and three months

The first few months are often an intensive sprint to learn as much as a new hire can. Productivity during this phase should be increasing but don't expect them to be at 100% quite yet.

Assign work

Employees are still in the learning phase during their first few weeks but that doesn't mean they can't dive right in. Make sure your new hires have something to work on to fill their days. **A good rule of thumb is to assign a task that requires them to work with someone else on the team.** That way they have a safety net if they get something wrong and it creates an opportunity for them to learn more about their colleagues. Keep in mind, 70% of employees report having friends at work is the most crucial element to a happy work life.[10] So build in opportunities for these relationships to start developing while the employee is getting up and running with their work.

Spend time on culture

Not everything needs to be about deadlines. **Make sure your new hire is exposed to the company culture and encourage their participation.** This can be done by personally inviting new employees to culture events or taking them along with you so they don't have to walk into a crowd alone. This is also a good opportunity to discuss what the tenets of the culture are and the values and mission of the company. The idea is to fold your new hire into the culture of the company, so they become a culture adopter and, hopefully, a "culture adder" further down the road.[11]

Create clear objectives

Does your employee have a good sense of what they need to achieve in their first three months? It's hard to have a direction when you don't know what you'll be judged on so make it clear. This conversation should go beyond the job requirements or behaviours discussed during their first week. Instead dive deeper into what performance reviews will look like and what the employee is expected to accomplish over the next three to twelve months. **Creating clear objectives with the employee and giving them chances to ask questions or have input on what they want to achieve helps move the employee from learning mode to working mode.** It also gives them a strong sense of what they need to aim for to be successful.

Hold check-ins

Once a new employee is up and running don't leave them up to their own devices. Even an employee that finds their feet quickly might have questions or need support when they're still learning. **Build check-ins into their schedule at one month, 45 days, and 90 days to make sure they're on track and meeting any targets you've set out.** Scheduled check-ins help you see if an employee is struggling or needs a training review instead of leaving them to sort it out alone. It also forces a more formal conversation about performance and expectations that can be uncomfortable to raise in a more casual setting.

Between three months and a year

At three months, your new hire should be starting to contribute in a real way. However, there are still a few tasks to cover off in your onboarding program before you send them on their way.

Feedback

Make time for regular feedback sessions throughout an employee's first year. Leaving everything to the annual performance review is a mistake because if there are issues that need to be raised then, an employee is usually blindsided by them. Ongoing feedback, then, becomes a necessary tool to keeping those lines of communication open between manager and employee. **Creating a team culture where kudos or corrections are given and received without judgement often helps build psychological safety within a team.** If your employee is doing something awesome, take a few minutes to praise them. Likewise, if an issue has come up, don't stay mum and wait for a formal setting to bring it up.

Benefit usage

One thing many managers forget about is benefit tracking. Wellness is becoming an increasingly large concern in a workforce where burnout levels are reaching new heights. A new employee may not remember everything they learned about benefits in their first week, and they might also feel uncertain about claiming them in their first few months, so remind them throughout the year that they are available. About three months before the end of the year, send your employee a summary of any benefits they have left, even if they are prorated, so they can make use of them while they still have the time. **Using their benefits will help employees stay on top of their stress levels and keep your team healthy and happy.**

Team building

While this should start on day one, don't underestimate the power of a bonded team and don't assume it will happen naturally. Remember, people don't get to pick their colleagues. So create opportunities for employees to see and engage with each other in constructive ways both inside and outside the company. **Strong teams can also benefit from the use of personality assessments when hiring and self-development surveys on an ongoing basis throughout their tenure with the company.** Teams that understand how their members work, think, and communicate stand a better chance at being a cohesive unit than those left to bond on their own.

Performance reviews

While feedback and check-ins should happen on a regular basis, a formal performance appraisal should also be included within a new employee's first year. Nothing in this meeting should be a surprise if you've been consistent about communicating with your new hire but it is a good chance to dive deeper into the kind of work that's being produced. These reviews shouldn't be about blame or punishment but rather a conversation about what's working or not working. **It's also a good opportunity to talk about how they've found their first year, where the employee wants to go, and any next steps to take leading into the next year.**

Conclusion

Taking the time to onboard new employees doesn't just help them transition to a new position more smoothly but it's also your chance to set them up for future success. By taking the time and energy up front, your new hire will feel welcomed and supported as they join your company. **How a new employee is introduced to the company, culture, team, and working community can have a large and significant impact on how long they will stay in a role and in a hiring era where great talent is in short supply, retaining great hires is crucial.** So spend the time planning out their onboarding with a formal program and make sure it lasts beyond week one to really make an impact. When employees feel well prepared to take on their new role, they become productive faster and integrate with their teams more quickly. Don't spend all that time and energy on the hiring process only to toss that new hire into the deep end. Supporting new employees can have a real impact on your company and your bottom line so formalize an onboarding process and monitor it to ensure long-term success. When employees are set up successfully right from the start, there's no telling how much they'll be able to achieve.

"Employee orientation centers around and exists to help the individual employee, but it is the company that ultimately reaps the benefits of this practice."

- Michael Watkins, Author of "The First 90 Days"[12]

Notes

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