Onboarding Toolkit

Everything you need to optimize your onboarding program

HR
center of excellence
by Paycor

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Everything you need to start is right here:

Onboarding 101

It's So Much More Than Paperwork

While filling out W-4s and selecting benefits are a necessary component of any new hire process, onboarding involves so much more than filling out paperwork. At its core, onboarding is the process of helping new hires become familiar with their new company, understand job expectations and assimilate into workplace culture.

The Four Elements of Successful Onboarding:

Rules and Regulations

Get your new hires up to speed on important details like your company policies, dress code, employee handbook and industry-relevant regulations.

Expectations

Ensure new hires understand job expectations and responsibilities. When clear expectations are set, employees have a better understanding of how they can best contribute to the mission and improve their own performance.

Culture

You don't want your new hires to feel like outsiders. Onboarding can help introduce them to company norms, both formal and informal.

Socializing

Successful onboarding programs include the social aspects of the workplace. Whether your company implements first day group lunches, team happy hours or the CEO takes time to personally welcome new hires, ensure new they bond with coworkers to establish an important sense of connection right from the beginning.

Why is Onboarding Important?

INC. reports nearly 30% of new hires quit within the first 90 days. The consequences of a weak onboarding experience range from poor employee performance, dissatisfaction, active disengagement and, eventually, turnover.

According to Bersin research, 4% of new employees leave a job after only one day, and 22% of staff turnover occurs within the first 45 days of employment. So, much like "location, location, location" is important in the real estate industry, "retention, retention, retention" is key for HR professionals. Companies spend an enormous amount of money, time and resources to find the perfect person for every role, and it shouldn't go to waste.

The entire first year with a new employee is a critical phase when it comes to engagement. Companies with an engaging onboarding program retained 91% of their first-year workers, and 69% of new employees are likely to stay at a company for three years or more if they had a great onboarding experience (SHRM Effective Practice Guidelines Series). **Sadly, though, only 12% of employees strongly agree that their employers do a great job with onboarding (Gallup, Inc. 2017).**

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The One Thing that Gets in the Way of Onboarding

The number #1 onboarding mistake organizations make is that HR and frontline managers get bogged down with manual, administrative tasks that take their focus away from more strategic initiatives.

According to the Center for Effective Organizations, tedious transaction tasks like administering employee benefit plans, processing payroll, and responding to employee questions take up more than 73% of an HR professional's time.

Onboarding can quickly and easily become nothing more than managing administrative details that, while important, are not the kinds of things that encourage employee productivity and retention.

Here's what can happen to new hires and HR professionals if you operate with manual onboarding:

- New hires spend days in the office filling out paperwork vs. meeting the team and learning about their roles and responsibilities
- Paperwork will create inefficiencies for HR professionals
- Spend valuable tracking down information
- Re-key information into multiple systems
- Create bad first impressions of you and the organization because of incoherent looks, tones and feels during the onboarding process

Bottom line, managers and HR professionals shouldn't get caught up in the administrative details. Everything that can be automated should be automated so the team can focus on the crucial, more strategic initiatives at hand instead of tasks. Ideally, new hires can enjoy their onboarding experience by having paperwork and necessary training completed before their official start date.
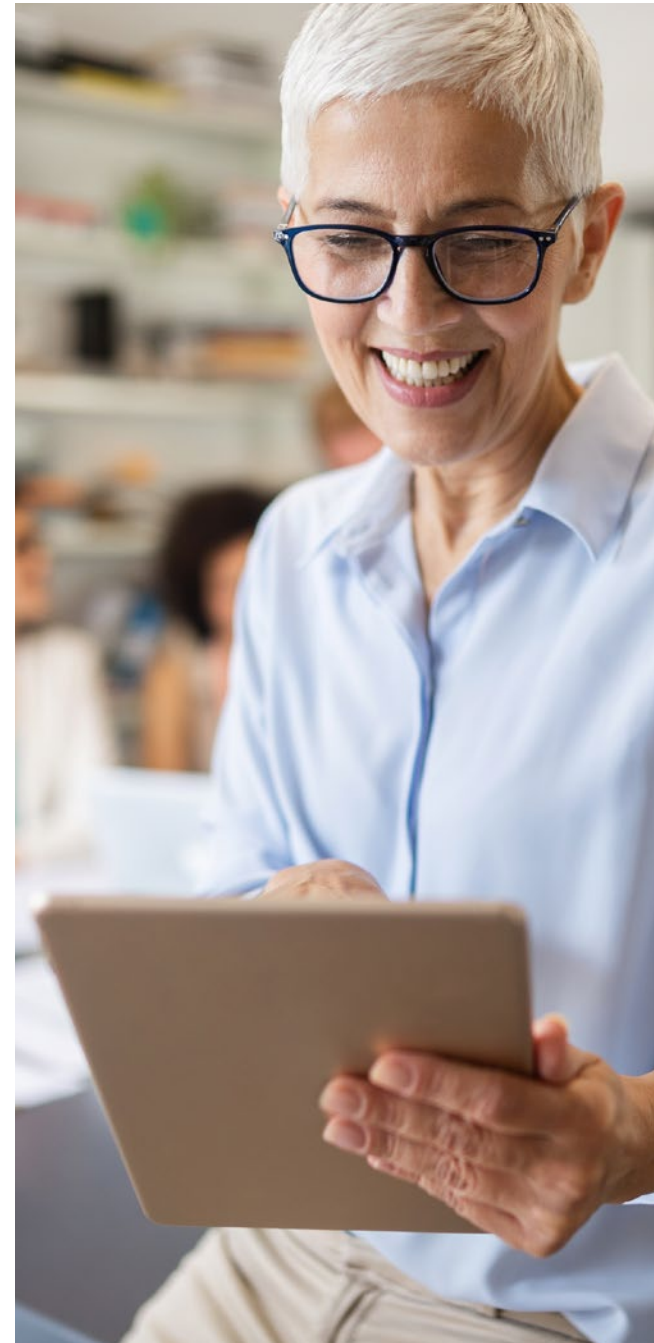
Four Primary Onboarding Problems

1

Problem: Manual paperwork

Solution: Kiss paper onboarding good-bye.

HR administrators don't have the time, or enough filing cabinets, to keep up with new hire paperwork. Investing in an onboarding tool to keep track of which documents are complete is key.

Look for a tool that:

- Streamlines workflows and eliminates paperwork inefficiencies.
- Reduces time spent tracking down information.
- Eliminates the need to re-key information into multiple systems.

2

Problem: Death by 1,000 questions

Solution: Empower employees from day-one to easily find answers to their own questions.

Make sure your onboarding tool:

- Provides easy-to-use, intuitive, wizard-based applications that guide employees through the process, answering questions along the way.
- Helps ensure accurate completion of all new hire paperwork.

3

Problem: Need new hires to hit the ground running

Solution: Don't wait until their first day to build a solid employee engagement foundation.

Ensure your onboarding system engages employees early – before their first day – with company information, handbooks and other policies to help them feel prepared and engaged right away.

4

Problem: Multiple, disparate databases

Solution: A single, integrated system of record.

No one has time to enter new hire information into multiple databases. That's an inefficient and error-prone process.

Make sure your onboarding solution is:

- An efficient and intuitive system of record for new hires.
- Integrated to ensure the utmost compliance and workflows to prevent redundant administrative work.

Your Complete Pre-Boarding and First Day Checklist

Engage your people from day one: use this checklist to guide employee development and lay a strong foundation for success.

Pre-Boarding

- [ ] **Onboarding tool automatically sends welcome message**
- [ ] **New hire completes this information through onboarding tool:**
  - Personal info
  - Contact info
  - W-4
  - I-9
  - Direct deposit form
- [ ] **New hire acknowledges key policies:**
  - Handbook or manual
  - Dress code policy
  - Non-disclosure agreement
- [ ] **Onboarding tool provides detail to create employee record in the system**

Day One

- [ ] **Welcome**
  - Email or voice mail from hiring manager and/or team members
  - Include link to video clips from the new hire portal
  - Welcome card from peers
- [ ] **Welcome basket**
  - Company logo gear
  - Org chart with position descriptions
  - General phone directory
  - Phone directory of key contacts and position descriptions
  - Links to key information on company website and new hire portal

Your Complete Pre- Boarding and First Day Checklist

1 **Day One, Continued**

☐ **Key schedules**
- Payday
- Expense reports due
- Training report due
- Weekly sales activity report due
- Weekly forecast due
- Territory development plan due

☐ **FAQs**

☐ **Technology and logistical set up**
- Parking pass
- Phone extension
- Work space
- Business cards
- Card key
- Cell phone
- Laptop
- Computer login
- Resource center login and password
- Credit card
- Email address
- Office key

☐ **Office supplies provided**
- Paper
- Paper Clips
- Pens
- Stapler
- (other):

☐ **Introducing new hire**
- Email announcing new hire
- Internal social media posting

☐ **"Set up for success" preparation by hiring manager**
- Review job requirements
- Identify high-value activities

☐ **Review hiring manager checklist**

☐ **Assign mentor or buddy**

☐ **Set dates for orientation and learning programs**

Your Complete 90-Day Checklist

90 The First 90 Days

In general, here are some guiding principles that employers should make a priority during the first 3 months of a new hire's employment:

- Provide position-specific training as well as cross- training if possible. The more your new employee knows, the more useful they will be to your company.

- Carefully monitor job performance and provide constructive feedback where appropriate.

- Schedule regular check-ins, soliciting feedback regarding observations about your business policies and procedures.

- Monitor the effectiveness of the employee you assigned as a mentor or buddy, providing guidance as needed to that employee.

Your Complete 90-Day Checklist

ONBOARDING TOOLKIT

More specifically, here's what each phase looks like:

30 Days

This is when your new employee gets the hang of things. They're still getting used to a new work environment, so introduce them to job-specific tools and projects and set small goals.

- ☐ Verify that all required new hire training has been completed.
- ☐ Set up 30-minute introductions with all of the other employees your new hire will be working with.
- ☐ Schedule weekly check-ins to gauge how your new hire is doing.
- ☐ Ensure your new hire is comfortable with the tools that are necessary for success.
- ☐ Conduct a 30-day review.

60 Days

This period involves more collaboration and bigger responsibilities. It's a time to ease off on the training and focus more on the doing.

- ☐ Meet with the employee a minimum of 1-2 hours every other week to identify how they're doing, what they've learned, challenges faced and get to know them better personally.
- ☐ Review achievements against expectations to date. Give constructive performance feedback early and often.
- ☐ Use this date as a checkpoint.
    - Is this person the right person for the job?
    - Are they the right fit?
    - Do they have the skills they "sold" during the interview process?
- ☐ Conduct a 60-day review.

90 Days

Now is when you'll start taking off the training wheels. Your new hire becomes accountable for their work and is able to accomplish projects with limited guidance from you.

- ☐ Your new hire should have a thorough understanding of the company, its offerings, interdepartmental relations and processes.
- ☐ Assign your new employee a major project that involves other departments.
- ☐ Conduct a 90-day review.

9

What Happens After 90 Days?

10 Ways to Take Onboarding to The Next Level.

Even when the first 90 days conclude, it's important to maintain communication to emphasize that you are invested in your employees' future. Listen to concerns, and when new interests are expressed, create a plan to incorporate them into the employee's current responsibilities in a way that has a positive impact on the company's goals.

10 things to think about when planning onboarding beyond the first 90 days:

1. Encourage your employee to seek additional role-specific professional development opportunities.

2. Continue a mentorship program for the employee, and encourage them to serve as a buddy for more recently hired team members.

3. Send your new employee to relevant industry-related events and conferences.

4. Make sure the employee is working on internal cross-functional projects to get people from across the organization working together.

5. Where appropriate, encourage cross- departmental training.

6. Schedule weekly or bi-weekly touchbases.

7. Conduct mid-year and annual performance evaluations.

8. Request formal feedback of the employee's performance from their co-workers.

9. Assign stretch goals.

10. Be sure to publicly recognize the employee for successes and achievements.

The Holy Grail of Onboarding: Building a Culture

Culture can make or break a company.

According to Bain & Company 81% of companies that lack a high- performance culture are doomed to mediocrity. Unfortunately, fewer than 10% succeed in building one. The holy grail of onboarding occurs when you have all your bases covered, so you can begin to focus on acculturation – building a true sense of community & team.

Ways to build culture:

1. Implement buddy systems

2. Host team lunches and potlucks

3. Provide learning opportunities.

4. Have periodic team outings (sporting events, amusement parks, bowling or laser tag)

5. **Celebrate team successes.** Take them out to dinner or happy hour.

6. Hold contests and drawings for company merchandise, gift certificates and other prizes.

7. **Have fun.** Create an environment where people love to do the work they love, and everyone benefits.

8. **Cut down on meetings.** According to a survey conducted by MeetingKing, 37% of employee time is spent in meetings; 70% of meeting attendees bring other work to do during meetings (a sure sign that meetings are wasting time); and 20-50% of meeting time is considered wasted.

9. Where appropriate, encourage flexible work schedules.

10. Participate in a group volunteer project for a local nonprofit organization.

11. **COMMUNICATE!**

12. Don't buy in to the "busyness" culture. Far too many managers reward team members based on how stressed out they are, or how often they are the last in the office. **Everyone doesn't have to be busy all the time.**

13. Find team members who complement you. Identify your strengths and weaknesses, then fill in the gaps.

How Paycor Can Help:

Paycor can help you accelerate new hire productivity and impact your bottom line. Check out our latest Onboarding video, complete with a look at all the ways we can help you create a memorable first impression for your people. And if you'd like to schedule a personalized demo of the onboarding tool, contact us today.

Learn more about Paycor's technology and expertise.

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