



Onboarding New Employees

Participant Workbook



enhance the experience.

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Onboarding New Employees

Agenda

- Introduction and overview
- Making onboarding effective... and FUN
- Using a buddy program
- Remote onboarding
- Close

Goals of Onboarding

For each of the goals below, rate your current onboarding against that goal using the following scale:

1 = Very poor or non-existent

4 = Strong

2 = Poor

5 = Outstanding

3 = OK or Average

Onboarding should help a new employee...

Rating	Goal
	Feel welcomed
	Get to know the people with whom they will be working
	Get the tools they need to be successful
	Integrate into the company's social and operational functions
	Reduce the time needed to reach competency
	Connect to the organization's purpose
	Feel appreciated
	Emotionally connect to the company

Why Onboarding is Important

33% of new hires look for a new job within 6 months

23% of new hires leave before their first anniversary

100-300% of the replaced employee's salary is organizational costs of employee turnover

Source: Ferrazi Greenlight

20% of turnover happens in the first 45 days

After a great onboarding experience, employees are **69%** more likely to stay with a company 3 or more years

New hires with longer onboarding programs report **proficiency 4 months sooner** than those with shorter programs

Source: O.C. Tanner

Companies with strong onboarding:

82% improvement in employee retention

70% improvement in productivity

Source: Glassdoor

80% of first week new hire activity dedicated to form completion and administrative tasks

Source: Learning Rebels

Making Onboarding Effective... and FUN

Stages of Onboarding

- Before the first day
- The first week
- The first 90 days
- The rest of the first year
- At their 1-year anniversary

Before the First Day

- Stay in touch
- Have interviewers send new hires a special note of congratulations
- Send out helpful information
- Create an agenda for the employee's first week
- Create a 30-60-90 Day plan
- Set up a comfortable workstation with needed software installed
- Add the employee to email distribution lists and folders
- A day or two before, announce their arrival
- Provide a welcome gift

The First Week

- Make them feel welcome
- Help them get the lay of the land
- Introduce them to people
- Block off time for HR orientation
- Meet their supervisor
- Take them to lunch
- Cover important work processes
- Communicate purpose

Onboarding New Employees

Orientation

Industry	Company	Department
<ul style="list-style-type: none">• The competitive landscape• How contact centers operate	<ul style="list-style-type: none">• Management philosophy• Mission, vision, values & how they are lived out• Brief company history• Organizational structure• Connect with leadership• Strategic direction• Benefits• Health & safety• Compliance topics• Purpose	<ul style="list-style-type: none">• Department structure• Teammates• Job expectations• Environment• Peer mentor or buddy• Systems and applications

Make It More Engaging

With others in a small group, come up with at least three ideas for making the first week more engaging. Be prepared to share your best idea.

The First 90 Days

- Invest in training
- Allow for job-shadowing
- Build in opportunities for feedback
- Conduct a formal performance review
- Give recognition for their unique contributions
- Plan for the next 90 days

The Rest of the First Year

- Set new goals each 90 days
- Weekly one-on-ones with their direct manager
- Continue job shadowing and training as appropriate
- Call out accomplishments and recognize contributions

At Their One Year Anniversary

When the 1st anniversary is celebrated, employees were:

- 55% more likely to recommend the organization as a place to work
- 42% more likely to be proud of their organization
- 33% more likely to be highly motivated to contribute
- 29% more likely to support the organization's values
- 24% more likely to put a great deal of effort beyond what is required to help their organization succeed

Source: O.C. Tanner

- CELEBRATE!!!!
- Give a gift or symbolic award

Using a Buddy Program

What is a Buddy?

Someone who is not the new hire's manager and who partners with a new employee during onboarding to help them integrate more smoothly into the organization and their job duties.

Benefits of a Buddy Program

For the New Hire	For the Buddy	For the Organization
<ul style="list-style-type: none">• Clear point-of-contact and one-one-one assistance• Increased socialization• Knowledge of "how things really get done"	<ul style="list-style-type: none">• Expanded network• Opportunity to enhance teaching, mentoring, and management skills• A fresh perspective	<ul style="list-style-type: none">• Increased employee motivation and retention• Enhanced employee development• Increased employee productivity

Goals for the Buddy Program

- Offer advice and guidance
- Increase role clarity
- Convey the mission of the company
- Provide inclusion into other teams
- Provide a clear point-of-contact for answers
- Troubleshoot issues with systems and hardware
- Advocate for induction into the company culture

Structuring the Buddy Program

- Determine how long the buddy program lasts
- Determine what makes a good buddy
- Select and train people to be buddies
- Assign the buddy to a new hire
- Three distinct stages:
 - Pre-Start:** Welcome email and introductions
 - Orientation:** Guidance and support during initial couple of weeks
 - Momentum:** Support of the new hire's key learning outcomes

Buddy Selection

Selection Criteria

- Has a desire to help new hires
- Is patient
- Has strong communication and interpersonal skills
- Has been with the organization for at least 1 year
- Models the values and culture of the organization
- Readily accessible to answer questions
- At a similar level or peer group as the new hire

Selection Process

- Create an online channel or other online process for people to express interest in the program
- Post news about incoming hires
- Share the criteria and ask for volunteers
- Randomly select from the group of volunteers
- Provide a short training on responsibilities and tips

Buddy Responsibilities

Pre-Start

- Send a welcome email
- Be sure the new hire received their welcome packet
- Set up a time for a call before the first day to answer any questions

Orientation

- Welcome the new hire and introduce them to others
- Do a 1-hour meeting on “Company culture 101”
- Take the new hire to lunch
- Give an overview of communication tools

Momentum

- Support the new hire’s social integration
- Discuss professional balance with the new hire
- Have open conversations about professional development

Tips for Buddies

- Focus your attention on the new hire
- Be patient
- Be positive
- Be flexible
- Don’t get in the way of the new hire’s relationship with their direct manager

Remote Onboarding

Discussion: How is remote onboarding different than in-person onboarding?

Potential Failure Points

- Equipment does not arrive on time
- No plan for Day 1 / Week 1 / onboarding
- Zoom fatigue caused by sitting in a meeting for 5 hours or back-to-back meetings
- No account setup (such as email or other access not working)
- The direct manager is not available for training or for a meet and greet
- No one announced the new hire's arrival
- The welcome kit is delayed or doesn't arrive

Before the First Day

- Warmly welcome them and set expectations
- Prepare a training plan
- Provide helpful "paperwork"
- Take care of the technology
- Make it personal
- Share your excitement and build their anticipation
- Send a welcome package
- Recruit an onboarding buddy for them

A Memorable First Day

- Make a short video of some current employees talking about the company's core values and what they mean.
- Meet and greet virtually with the team through a virtual happy hour or coffee.
- Since you can't take them to lunch, send them a delivery gift card.
- Be sure to provide for breaks.
- Ask the new hire to document their first day with photos and/or video and post to team chat.
- Share expectations, especially those involving working from home.
- Share some of yourself.

Day 2 and Beyond

- Keep up opportunities to engage and collaborate
- Check in regularly
- Let them know they're seen
- Introduce & immerse them in your culture
 - Lunch or coffee roulette
 - Team fun activities
 - Ask me anything (AMA)

Best Practices

- Give them STUFF
- Let them know the plan
- Break up the tasks rather than overwhelming with everything at once
- Let them see you
- Create time for extra one-on-one manager check-ins
- Introduce the team
- Use communication methods
- Encourage fun
- Streamline formal activities where possible
- Foster a team spirit
- Ask for feedback

Re-Onboard If They Move to the Office

- Be thoughtful
- Orient them to the facilities
- More frequent one-on-ones
- Reactivate the buddy system

Action Plan

The goal of onboarding that I rated at the beginning of the workshop as the weakest was:

Some things I can do to strengthen this area of onboarding:

Action	Deadline

The person I am going to share this action plan with in order to be accountable for completing it is:
