



# **Onboarding New Employees**

Participant Workbook

## Onboarding New Employees

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*enhance the experience.*

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## Onboarding New Employees

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## 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

|   |  |   |
|---|--|---|
| <p><b>33%</b> of new hires look for a new job within 6 months</p>   | <p><b>20%</b> of turnover happens in the first 45 days</p>   | <p>Companies with strong onboarding:</p> <p><b>82%</b> improvement in employee retention</p> <p><b>70%</b> improvement in productivity</p> <p>Source: Glassdoor</p> |
| <p><b>23%</b> of new hires leave before their first anniversary</p>   | <p>After a great onboarding experience, employees are <b>69%</b> more likely to stay with a company 3 or more years</p>                                |   |
| <p><b>100-300%</b> of the replaced employee's salary is organizational costs of employee turnover</p> <p>Source: Ferrazi Greenlight</p> | <p>New hires with longer onboarding programs report <b>proficiency 4 months sooner</b> than those with shorter programs</p> <p>Source: O.C. Tanner</p> | <p><b>80%</b> of first week new hire activity dedicated to form completion and administrative tasks</p> <p>Source: Learning Rebels</p>                              |

### 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

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### Orientation

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

### 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

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

## 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:

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

| <b>Action</b> | <b>Deadline</b> |
|---------------|-----------------|
|               |                 |
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The person I am going to share this action plan with in order to be accountable for completing it is:

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