This training was developed by Elaine Carr and Laura Grimes of Harrington Consulting Group

https://www.harringtonconsulting.us/
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:

<table>
<thead>
<tr>
<th>Rating</th>
<th>Goal</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>Very poor or non-existent</td>
</tr>
<tr>
<td>2</td>
<td>Poor</td>
</tr>
<tr>
<td>3</td>
<td>OK or Average</td>
</tr>
<tr>
<td>4</td>
<td>Strong</td>
</tr>
<tr>
<td>5</td>
<td>Outstanding</td>
</tr>
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</table>

Onboarding should help a new employee…

- 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

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
<th>Source</th>
</tr>
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<tbody>
<tr>
<td>33%</td>
<td>of new hires look for a new job within 6 months</td>
<td>Ferrazi Greenlight</td>
</tr>
<tr>
<td>23%</td>
<td>of new hires leave before their first anniversary</td>
<td></td>
</tr>
<tr>
<td>100-300%</td>
<td>of the replaced employee’s salary is organizational costs of employee turnover</td>
<td></td>
</tr>
<tr>
<td>20%</td>
<td>of turnover happens in the first 45 days</td>
<td></td>
</tr>
<tr>
<td>82%</td>
<td>improvement in employee retention</td>
<td>Glassdoor</td>
</tr>
<tr>
<td>70%</td>
<td>improvement in productivity</td>
<td></td>
</tr>
<tr>
<td>69%</td>
<td>more likely to stay with a company 3 or more years</td>
<td>O.C. Tanner</td>
</tr>
<tr>
<td>New hires with longer onboarding programs report <strong>proficiency 4 months sooner</strong> than those with shorter programs</td>
<td></td>
<td></td>
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</table>

Source: O.C. Tanner

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
## Orientation

<table>
<thead>
<tr>
<th>Industry</th>
<th>Company</th>
<th>Department</th>
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</thead>
</table>
| - The competitive landscape  
- How contact centers operate | - 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 | - 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.
Onboarding New Employees

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

<table>
<thead>
<tr>
<th>For the New Hire</th>
<th>For the Buddy</th>
<th>For the Organization</th>
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<tbody>
<tr>
<td>• Clear point-of-contact and one-one-one assistance</td>
<td>• Expanded network</td>
<td>• Increased employee motivation and retention</td>
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<tr>
<td>• Increased socialization</td>
<td>• Opportunity to enhance teaching, mentoring, and</td>
<td>• Enhanced employee development</td>
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<tr>
<td>• Knowledge of “how things really get done”</td>
<td>management skills</td>
<td>• Increased employee productivity</td>
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<td></td>
<td>• A fresh perspective</td>
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</table>

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

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# 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:

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