WELCOME ONBOARD!

The Ultimate Guide to Onboarding

Contents

What is onboarding?

The Oxford Dictionary defines onboarding as:

The action or process of integrating a new employee into an organisation or familiarising a new customer or client with one's products or services.

The key words in this above definition are 'action or process'. Onboarding is something that you have to do consciously, or it doesn't happen. Every company should have an onboarding process for new hires.

It's a non-controversial definition that we can all agree upon. However, what 'integrating a new employee' means to one business might not be the same for another.

We've seen companies whose onboarding schedule lasts for a day, and others where it's an 18 month process.

WHERE DOES IT BEGIN?

Another relevant question is about where onboarding starts. At **bob**, we believe that onboarding starts when the interview stops. An active engagement process from recruitment and through to their first day and beyond.

Your new hire is thinking about their new job and team from the moment they apply, so they're already invested in the company. Your job is to ensure that emotional investment is not misplaced.

Onboarding is not one-size-fits-all, although there are common principles to follow.

Why onboarding matters

The saying 'you never have a second chance to make a first impression' applies to new jobs as much as new people.

However, most companies don't consider how much they need to work at making the right first impression with their new employees.

TWO CLEAR BUSINESS REASONS TO MAKE A GOOD FIRST IMPRESSION

● IMPROVED RETENTION

Replacing a departed employee carries a high cost, both in direct recruitment and loss of productivity. However, good onboarding makes a new employee more likely to stay longer. In fact, newly hired employees are 58% more likely to still be at the company three years later if they had completed a structured onboarding process[1].

● INCREASED PRODUCTIVITY

Whether a new hire is a direct replacement for an employee leaving the organisation, or a new role is being created, it takes time to get them up to speed. 62% of companies in a study by The Aberdeen Group reported faster time-to-productivity ratios when using an onboarding process for new team-members.

These are in addition to better cultural inclusion and increased engagement of the employee.

[1] The Wynhurst Group (2007)

The objective of employee onboarding

What are we trying to achieve by having an employee onboarding process?

For smart businesses, there are a number of objectives:

1

ENSURING LEGAL REGULATIONS ARE COMPLIED WITH

This is something that everyone has to do, and if you have a good process in place, you can reduce the amount of time that compliance takes. Minimise your admin load to focus on the more important parts of your role.

2

CREATING A GENUINE FEELING OF BELONGING

New employees often feel like fish out of water, which is very uncomfortable for them. When they feel like they really belong, they are more committed to the company, and better able to focus on their work.

3

MAKING IT EASY FOR HR TO MANAGE NEW HIRES

Each new employee means more administration for the HR team. For fast growth businesses who are bringing in new employees on a weekly basis, the admin load can be enormous.

4

FASTER RAMPING OF NEW HIRES

they'll be productive more quickly, and therefore contributing to the business earlier on. They'll feel better, and your business benefits.

5

BETTER RETENTION OF NEW HIRES

The hiring process is expensive - in terms of person-hours and money. Losing embedded members of the team can be destructive to company culture. For both of these reasons, you want to keep down employee churn.

6

PROVIDING A CONSISTENT EXPERIENCE FOR NEW EMPLOYEES

To make sure that all of the above are achieved effectively, you need a good and consistent onboarding experience. It's too important to leave to chance.

What are the key parts of a good onboarding process?

A good onboarding process has a lot of parts that usually need to be juggled simultaneously. This is why it's so important to have a solid procedure in place.

When creating the onboarding process for your organisation, you have to make sure that you have covered five key areas: compliance, logistics, management, training, and cultural engagement.

Your organisation may require additional items that are particular to your business or industry as well.

1

COMPLIANCE

Legal compliance and compliance with your organisations' rules, can often be completed remotely, and in large part before the new employee's first day in the office:

- Contracts of employment

- Informing HMRC of the new employee and their tax code

- Reading company policies

- Health & Safety training

- Any other legal requirements relevant to your business (e.g. Non-Disclosure Agreements)

2

LOGISTICS

Logistics are the basics that mean your new employee can turn up at the right place in order to do their job:

- Locations and directions, so they know where to go

- Ensuring ease of access if the employee has a disability

- Locating their desk

- Setting up their phone

- Providing a computer or helping them set up their own device for your systems

- Giving them internet access

- Getting them set up for payroll

- Giving them access to any specific systems that you use in the business - like **bob**

3

MANAGEMENT

With good management, you're not just allowing the new hire to do their job, you're supporting them to get it right more quickly. This is where the hiring manager really gets involved:

- Providing relevant company and team information, like what you do and how you do it

- Setting up the new employee to use company and team processes (e.g. booking meeting rooms or booking holiday)

- Setting objectives and goals for 30, 60, 90 days so the new hire knows where to focus

- Adding the new employee to the company holiday calendar, and letting them know when they can start using their allocated time off

4

TRAINING

The majority of employees will need some training on arrival, so it's best to consistently provide new employees with learning opportunities that will bring them up to speed quickly:

- Introduce your learning processes, systems and policies, so the new hire knows what's expected and that provision has been made for their development

- Carry out skills assessment to gauge knowledge and ability. This will influence their ongoing personal development plan

- Set up supervision and mentoring for the new employee

- Set up any role-specific training for the new hire

5

CULTURAL ENGAGEMENT

47% of the workforce have turned down a job offer because they felt that the culture wasn't the right fit for them or that they wouldn't get along with their colleagues. You need to get this bit right:

- Explain company culture and values, so the employee understands your 'why'

- Meeting their direct team, and any people they'll work closely with on a regular basis

- Meet key people in the company, such as department heads, members of the management team, and IT support

- Helping the new employee to foster personal connections with the team based on work and personal interests

- Setting up welcome events such as new-starter meetings with the CEO, 'First Friday' after-work drinks, and welcome lunches

DAY	AREA	ACTION	RESPONSIBILITY	✔
-7	Compliance	Prepare and send employment contracts	HR	
-7	Culture	Set 'first Friday' drinks for new employee and their team	Line Manager	
-7	Logistics	Check for any special access requirements	HR	
-7	Logistics	Send the new starter directions and instructions for their first day	HR	
-3	Culture	Book someone to take the new employee for lunch on their first day	Line Manager	
-3	Management	Set new hire's orientation date	HR	
-3	Culture	Set up new starter meeting with the CEO	Hiring Manager	

DAY	AREA	ACTION	RESPONSIBILITY	✔
-1	Logistics	Set up desk and welcome kit	Facilities	
-1	Logistics	Open company email account & send usage instructions	IT	
-1	Logistics	Open accounts for other company systems & send usage instructions	IT & Hiring Manager	
-1	Management	Send new hire intro email to the department/company saying they're starting tomorrow	Hiring Manager	
-1	Logistics	Add employee's name to any group lists, distribution lists, phone lists and websites	HR	
-1	Logistics	Set up the new starter's phone and email them with the number	Facilities	
-1	Logistics	Add the new employee to the company holiday calendar, and email them with details of when they can start using their allocated time off	HR	

DAY	AREA	ACTION	RESPONSIBILITY	✔
1	Compliance	Employee to complete their personal details in the HR system	New Employee	
1	Compliance	Set up the employee as PAYE with HMRC	HR	
1	Logistics	Employee to add their bank details to the payroll system/form	New Employee	
1	Compliance	Provide HMRC new starter checklist to employee to print and sign	HR	
1	Compliance	Employee provides passport or visa (right to work)	New Employee	
1	Compliance	Book health & safety training for new hire	HR	
1	Compliance	Send any company-specific forms for employee's signature	HR	
1	Logistics	Give new hire internet access	Facilities	

DAY	AREA	ACTION	RESPONSIBILITY	✔
1	Logistics	Set up new hire with payroll on admin side	HR	
1	Logistics	Give new hire access to any specific systems that you use in the business (like bob!)	HR	
1	Management	Provide relevant company and team information, like what you do and how you do it	Line Manager	
1	Management	Set up the new employee to use company and team processes (e.g. booking meeting rooms or booking holiday)	HR	
1	Training	Book health & safety training for new hire	Line Manager	
1	Culture	Arrange for employee to have meetings with their direct team, and people they'll work closely with	Line Manager	

DAY	AREA	ACTION	RESPONSIBILITY	✔
2	Compliance	Share any relevant company policies	HR	
2	Management	Set objectives and goals for 30, 60, 90 days so the new hire knows where to focus	Line Manager	
2	Training	Introduce your learning processes, systems and policies for personal development	HR	
2	Training	Carry out skills assessment to gauge knowledge and abilities	Line Manager	
2	Culture	Set up meetings with key people (department heads, members of the management team)	Hiring Manager	
3	Culture	Explain company culture and values to the new hire	Line Manager	
4	Training	Set up supervision and mentoring for the new employee	HR/Hiring Manager	
5	Culture	Connect new employee with others in the company based on work and personal interests	Line Manager	

DAY	AREA	ACTION	RESPONSIBILITY	✔
7	Compliance	Enroll employee in pension plan	HR	
7	Logistics	Enroll employee in other staff benefits	HR/Employee	
30	Management	Carry out 1 month progress review meeting	Line Manager	
90	Management	Carry out 3 month progress review meeting	Line Manager	

Ready-made onboarding emails

A nice welcome and introduction goes a long way toward helping a new hire to fit in.

Here are two essential emails that you can copy and paste. Just customise the parts in brackets:

WELCOME EMAIL

WHEN TO SEND: A week before the new employee starts
WHO TO SEND IT TO: The new hire
WHO TO CC: Their hiring manager
WHO SENDS IT: HR
SUBJECT LINE: We're looking forward to having you as part of the team

Hi [employee name],

We're looking forward to having you as part of the team at [your company name].

This email is to welcome you and let you know what you'll need to do for your first day.

Your start date is [date] and we'd like you to arrive at [time]. Here's a link to directions: [link - delete if not required].

When you get here, please come to reception and ask for [hiring manager]. They will take you to your desk and get you set up.

Our dress code is [smart/business casual/casual - delete as appropriate and add any specifics].

We'll need your National Insurance details and to see a copy of your passport/visa as well. Bring them with you on your first day/scan and upload them to bob, our HR system. [delete as appropriate]

No need to bring lunch, as your team will be taking you out.

If you have any questions, feel free to drop me an email or give me a call.

Kind regards,

[your name]
[your email signature]

Ready-made onboarding emails

INTRODUCTION EMAIL

WHEN TO SEND: On the start date
WHO TO SEND IT TO: The whole department/company
WHO TO CC: The new hire & the CEO/senior team
WHO SENDS IT: Hiring manager
SUBJECT LINE: Please welcome [employee's name] to the team

Hi everyone,

Please join me in welcoming [employee's name] to our [department name] team.

[Employee's name] is our new [role] and will be reporting to [line manager] and working with [key team members].

Coming to us from [previous company], [employee's name] is experienced in [subjects]/keen to learn about [subjects]. [Delete as appropriate]

[Employee's name] is originally from [town/country], and enjoys [hobbies].

We'll be having a welcome drink for [employee's name] on [day and time] at [location]. Please come and say 'hi'.

You can find [employee's name] at [desk location].

Kind regards,

[your name]
[your email signature]

Onboarding resources and tools

There are a number of places to go for information on some of the common HR things that you'll need to do for your new employees. Some of these may change over time, so it's a good idea to review them on a regular basis:

UK government links:

Checking 'right to work' documents:
https://www.gov.uk/check-job-applicant-right-to-work

Types of checks you can make on job applicants:
https://www.gov.uk/employers-checks-job-applicants

Setting up visa sponsorship for an overseas employee:
https://www.gov.uk/sponsor-management-system

Government employers site:
https://www.gov.uk/browse/employing-people

The Pensions Regulator:
http://www.thepensionsregulator.gov.uk/

CIPD guidance on setting up and managing HR policies:
https://www.cipd.co.uk/knowledge/fundamentals/people/hr/policies-factsheet

bob - A central platform that will run your onboarding processes for you. Free trial available:

www.hibob.com

What next?

After onboarding, how do you transition your new hire to the regular type of HR engagement that other people in their team receive? Do you have a plan?
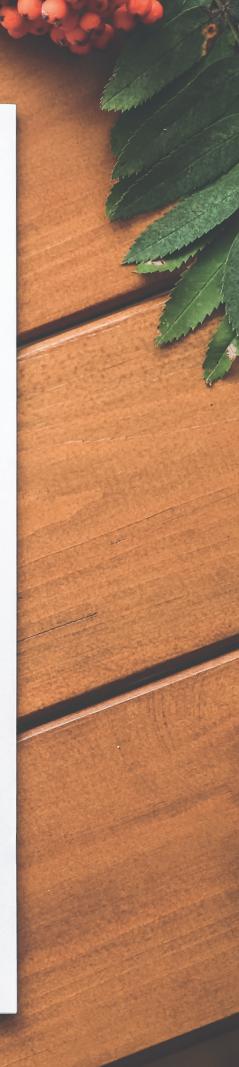
FIND THE RIGHT TIME

We recommend looking at the cycle of things that you normally do with your employees and work out the best time to slot your new hire into them.

For example, if your new hire starts with you in May and you run your annual performance appraisals in June, it doesn't make sense to have them join the process in their hiring year.

LET THEM KNOW WHAT'S EXPECTED

No one likes to find out by surprise about new procedures that they have to be part of, so let them know early on what's required.

A short email with a list, or a guide in your employee HR documents file, would mean they can refer back to it. After all, what's second-nature to you could be completely new to them.

About bob

bob helps you build a digital hr organization by using modern admin tools, smart data insights and the ability to create a compelling employee experience

We know how important onboarding is, and we want to help you get it right. That's why we created our full-stack HR, benefits and engagement platform.

ONBOARDING MADE EASY

With **bob**, onboarding becomes effective and easy. Simply use our ready-made workflow to allocate the right tasks, to the right people, at the right time. You can check in to see if tasks have been completed, and upload policies and documents for easy reference.

WANT TO CUSTOMISE THE PROCESS FOR YOUR COMPANY?

No problem. Everything is editable and you can add and remove steps as you please.

TAKE A FREE TRIAL

Take **bob** for a test drive for 14 days. You can even run an onboarding workflow in that time to see how it works for you.

FREE TRIAL