

The Definitive Guide to

ONBOARDING

Everything You Need to Know to Onboard Like a Pro

bambooHR™

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Introduction

There's a lot of noise about talent. Where to find it, how to attract it, hire it and keep it. Everyone's talking about talent because that's what makes your company awesome. Having great people equals success. But in the middle of all that noise is the bridge that gaps finding the talent and keeping it: onboarding.

It's taken HR and managers a lot of time and money—sifting through resumes, doing loads of interviews, finding the person with the right skills who will also be a good fit—to narrow it down to one person. But you finally found the right person, made an offer and it was accepted! Hallelujah!

After that incredible and expensive effort, you have your new hire standing before you, equal parts excited and nervous about being there on the first day of work. What many companies don't realize is that they're not done recruiting yet. Yes, your new hire is there, ready to begin work, but your job is far from done.

You must be recruiting well into your new hire's first few months. In fact, studies have shown that most new employees (**87 percent** of them according to a study by the Aberdeen Group) aren't fully committed to a new job for the first six months.

Sounds like a lot of work, right? Well, how badly do you want to keep your new hire?

BambooHR recently completed a study about onboarding and new-hire orientations, and we want to share some valuable insights. We surveyed over 1,000 people and asked what was most important to them when they started new jobs.

A startling 31 percent of respondents had quit a job within six months of

starting it. What's more, a steady stream of employees left from the first week through the third month. From one week to three months, the exit rate consistently hovered at 16-17 percent. That means the average company is losing 1 in 6 of their new hires each month for the first three months.

So what can explain this outward flowing movement?

Many new hires aren't fully invested when they start a new job. Sometimes the company has no control over the situation, like in the following scenarios we learned are happening from individual respondents' comments:

1

Offers are rolling in. Your new hires were actively looking for jobs, and your company was probably not the only one that interviewed them. Your new hires may still be getting offers from interviews that occurred before they accepted your offer (and well, the other offers may be for more money or have better perks).

One respondent answered: "A larger and desirable place that was slow to interview ended up contacting me and giving an offer I could not refuse!"

2

Your new hire was still looking. Lots of people suffer from buyer's remorse. If you think your new hires don't suffer the same type of self-doubt about a job, you're kidding yourself (especially in the first several weeks when there's so much information to take in and they don't really feel attached yet). Have you ever checked a store to see if the price was lowered on something you paid full price for? A new hire may go back to check on that other job they turned down or, out of habit, may still be checking the job listings to make sure a better job opening didn't just pop up.

One respondent answered: "I received another more intriguing job opportunity."

3

They were still deciding on a career path. Our research shows that a vast majority of people who quit jobs in the first six months left entry-level (43 percent) or intermediate (38 percent) positions. And 28 percent of respondents who quit early "decided the work was something [they] didn't want to do anymore." They weren't really sure what they wanted to do when they accepted your offer.

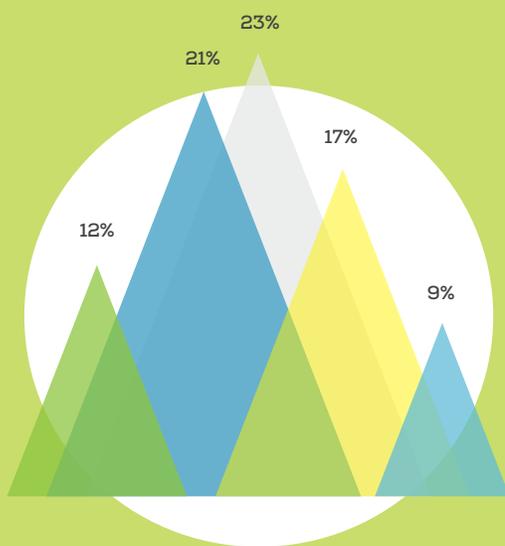
One respondent answered: "I chose a new career direction."

So what do you have control over?

When a new hire leaves in the first six months, it feels like a lot of wasted time and money. We hear startling numbers associated with faulty hiring and re-hiring. Some experts estimate it costs companies 2X the employee's annual salary. And one trend-setting company offers not-quite-right employees large lump sums of money to quit.

Even though these scenarios seem out of your control, this guide will show how you can have an impact and keep those new hires.

Of those survey respondents who left within the first six months, they said the following things would have helped them stay at their new jobs:



- **23 percent** of respondents said, “receiving clear guidelines to what my responsibilities were.”
- **21 percent** said they wanted “more effective training.”
- **17 percent** said, “a friendly smile or helpful coworker would have made all the difference.”
- **12 percent** said they wanted to be “recognized for [their] unique contributions.”
- **9 percent** said they wanted more attention from the “manager and coworkers.”

That's a lot of stuff you can control!

It's time to create an onboarding process that puts you in the driver's seat. You need to know you're addressing those things your new hires want and make sure nothing slips through the cracks along the way.

Don't waste the investment you made on your new hire by not onboarding correctly.

Over 32 percent of new hires have had barely any onboarding or none at all. It's important that you give each and every new employee an onboarding experience to remember.

15 percent of respondents noted that lack of an effective onboarding process has

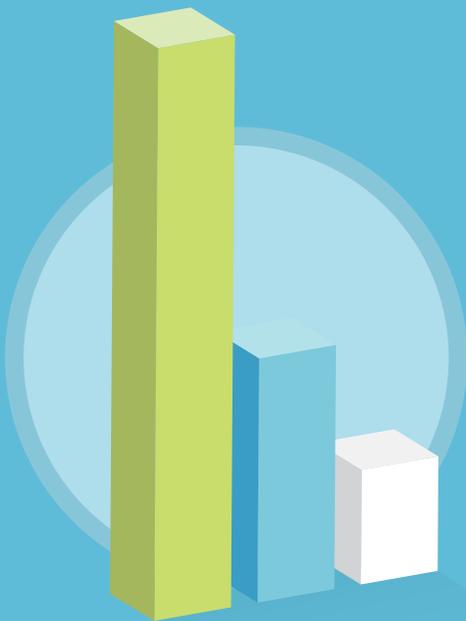
contributed to them quitting or considering quitting a job.

Celebrate and recognize people in the beginning, not just at the end.

People always have farewell parties when employees go off to their next adventure. Don't have parties when people leave, have parties when people start!

75 percent of respondents felt that thorough new-hire orientations are worth the time spent.

Based on what new hires say is most important to them, you may need to revamp your current onboarding process.



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1

Outline responsibilities

New hires want you to tell them exactly what their responsibilities are



23%

23 percent of respondents said they would have stayed at a job they quit if they'd been *“receiving clear guidelines to what my responsibilities were.”*

People need to know exactly what their current role entails, which responsibilities they need to take over and the steps to take to get it all done. If you have processes set up, they need to be shared with your new employees before they begin working on their first projects. Also, be sure to share who will be a part of the process, checks and balances and how they can see their projects through.

Your employees also will want to know how their performance will be measured. We all want to do well at our jobs and that can be hard to do when we don't know how we will be evaluated. It should be an open line of communication between the manager and the new hire. The new hire should be free to ask questions upfront and along the way. Be sure to check in often to make sure everything is going as planned.

2

Train

New hires want more effective training

21 percent of employees who left in the first six months cited their reason for leaving that they weren't "*given the training [they] needed.*"

You hire someone because there's a job you need done. If you aren't communicating what new hires are supposed to be doing and arming them with the tools to do it properly, you're setting them up to fail. Empower them with training and tools so they can provide the help you needed when you decided to list that job opening.

If you think they can figure it out on their own, they may make it—but it'll be a struggle. They'll think you don't care about them or their success at your company. And one of the biggest factors in getting your people to be engaged in their work is knowing you care about them and their careers. New hires will be frustrated if they're left to sink or swim.

You're busy. We get that. It's a catch-22. You're so busy you have to hire someone else to lighten the load. But when they come on, you don't have the time or people to train them even though that's what they need most.

People are essentially good; they want to do the best job they can. You must supply them

with the necessary information to do it or they won't be fulfilled or engaged. And they'll eventually leave.

Our research shows that development is the most important thing that people look for in a job. In that regard, everyone is an intern.

You also don't want to inundate your new hires with way too much information.

While it's important to get your new hire ramped up and productive quickly, you also need to make sure you provide on-the-job training in a manageable flow. Remember that it's hard to start out at any job. There's a lot to learn.

Approach each new employee like you have them for a period of time—and during that period of time, you are committed to helping them to develop. You'll be setting them up for success at your company.

76 percent of new hires said on-the-job training was the most important thing they need to become productive quickly.

3

Accept the new hire

New hires want to feel accepted by your team

17 percent said, *“a friendly smile or helpful coworker would have made all the difference.”*

Another thing you should be doing is making sure the new hires feel valued. Part of this includes making sure everyone is excited they're there.

Give your team opportunities to connect on a personal level with the new hire. Coordinate a lunch with other team members. Set up meetings where the new hire will start learning how the team works and where the new hire's role fits within the team. Give the new hire a project where working with others is part of the deal. Set the new hire's desk near others on the team. Then double check to make sure everything's going well.

To keep existing team members from resenting a new employee, make sure you outline roles and responsibilities to the entire team so no one's stepping on each other's toes. Sometimes existing team members could feel threatened that someone new could take over their responsibilities. So it's a good idea to clarify the position of the new hire as well as other team members whose work is closely related, how they'll interact with each other and how projects will run.

Be open and make sure everyone knows how the new hire will be relieving others of their burdens. If you prepare team members for the responsibilities and roles of the new hire, the team will be welcoming and encouraging.



4

Give early feedback

New hires want feedback on their early work and assurance they're headed in the right direction

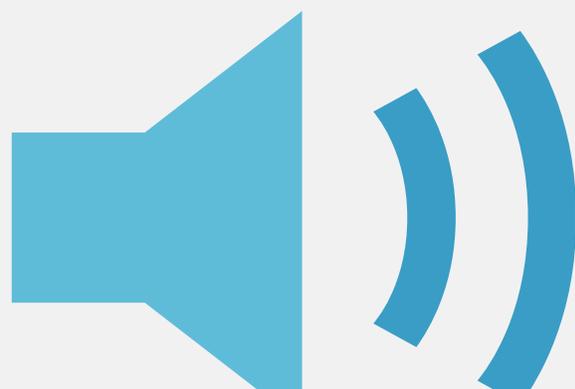
12 percent of new hires would have stayed in their jobs if they'd been "*recognized for [their] unique contributions.*"

Recognition and rewards confirm to employees that their work is valued. It helps us to know that others see the value and respect us for it. In fact, from study after study, employee recognition is the biggest factor in motivating people in the workplace.

You need motivated employees to get the very most out of them. Your new hires are just the

same. They need to know which actions are acceptable and will be recognized, and that guides employees in the right direction. This is especially helpful with new employees and during those first six months when employees are still deciding if they're going to stay at a new job, but also keeps your seasoned employees on the right path.

Reviewing and giving thoughtful feedback on your new hire's early contributions are also important during onboarding (**47 percent** of respondents thought so).



5

Put management in charge

New hires want their direct supervisor



33 percent of new hires said they wanted their manager or direct supervisor to be the one to show them the ropes.

Managers need to be involved in onboarding. You can't just leave it to HR. New hires prefer their manager be the one to guide them during those first weeks on a new job. Can you show your new hires your commitment to them by making sure they have who they need to be in charge of starting them off on the right foot?

It just makes sense that the person who will be overseeing the work and will be directly affected by the employee's contribution—and

whose success also depends on what work is done—will be the one to get a new hire started. He also knows more about the job than HR or a team member with a different role.

While HR can be a huge support, HR does not control whether onboarding is a success or not. The manager or supervisor of that position ultimately determines the success of onboarding.

6

Assign a mentor

New hires want a mentor

56 percent of respondents thought assigning “an employee ‘buddy’ or mentor” was one of the most important things a new employee needs to get up to speed and begin contributing quickly.

Pair up your new hires with seasoned employees who will take interest in their careers and will be available to answer question—even the silly little ones people feel intimidated to ask a boss or manager.

A mentor should help make transitioning to the new job easier, ensuring the right training is happening. The mentor should also be willing to check back over and over throughout the first several months on the job.

Of course new employees like to get recognition from the boss, but it’s always nice (sometimes even better) to hear it from coworkers or a mentor. The mentor will be able to catch things that the manager may miss. A mentor can give guidance when needed.

Your new employee also needs to feel a connection with others right away. Because all of your co-workers have had time to gel together, it may leave new employees feeling out of the loop. Having an automatic “friend” who can answer questions in an informal setting gives new employees a connection.

In addition, **36 percent** of HR believes a mentor/buddy program needs to be created or updated at their companies.



7

Focus on the stuff that really matters

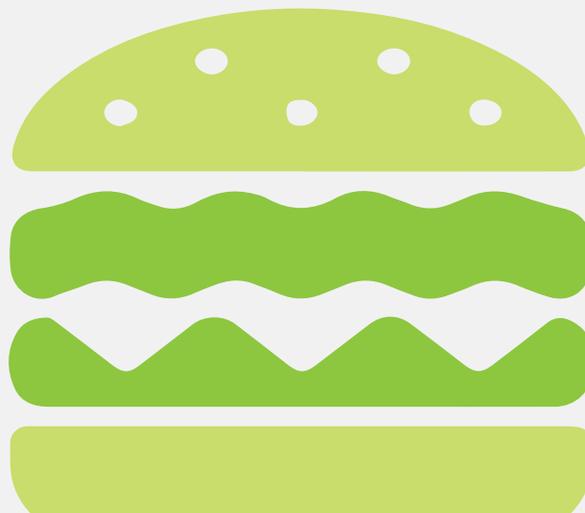
*New hires want you to focus your efforts on the things
that set them up for success*

Less than one percent of our respondents said that free food or extra perks would have made a difference to whether they stayed on or left a new job.

If you think offering up a free lunch or a box of donuts can help cover up an inefficient onboarding plan, don't count on it. That is particularly telling at a time when companies tout their cool cultures with free espresso machines, state-of-the-art in-house cafes, catered gourmet meals and free dry cleaning. But that's not really what matters: New hires want to learn how to do their job and the inner workings of your company. In short, they want to start doing meaningful work and contribute fast!

“You get the employee engagement you deserve. If you don't engage with them, they won't engage with you... This is particularly true at important moments of truth starting with how you onboard them.”

—George Bradt, *Forbes*



What Can HR Do?

Does your company's onboarding process have room for improvement? 91 percent of HR thinks their current onboarding process needs some kind of improvement.



43 percent of HR believes “time and money are wasted because of ineffective onboarding processes.” And how much money? The largest percentage—45 percent of HR—believes they waste more than \$10,000 year on faulty onboarding practices.

HR believes they should update their onboarding process by:

41%

On-the-job training

37%

Create a mentor/buddy program

28%

Update the employee handbook

Yep, your employee handbook just may need a facelift. But why not update it with shiny new pictures and perhaps consider an e-book as the format of choice.

Doing meaningful work still trumps everything else when new hires come onboard. People take pride in their work first,

the other stuff comes later. 52 percent of respondents believe “receiving organized, relevant and well-timed content” is the most important aspect of the onboarding process.” And 37 percent want a mentor to help them understand the culture, get one-on-one help with new projects and have a place to ask questions.

George Bradt's three 'A's of onboarding makes sure nothing—or nobody—slips through the cracks. Keep these in mind when developing a personal onboarding plan for your company:



3 A's

Accommodate | Assimilate | Accelerate

ac·com·mo·date

verb (used with object), ac·com·mo·dat·ed, ac·com·mo·dat·ing.

1. to do a kindness or a favor to; oblige; to accommodate a new employee.
2. to provide suitably; supply (usually followed by with): to accommodate a new hire with supplies.
3. to furnish with accommodations.

When you think of accommodations, you probably picture a comfortable place to be—like having a soft, warm bed to sleep in after a long day of driving. Accommodating your new hires is similar in that a lot of it is making ready the physical things for your new hire.

These need to be considered before your new hire walks through the door on day one. Plan so that everything is set up and ready for your new hires to get to work. You can't waste time when he arrives trying to set up the computer. New employees will feel like you're unprepared and won't be able to start with the training of the work they're there to do.

Accommodations you need to make for your new hire:

Desk or office. First, you need to carve out a physical space where your new hire will sit—a desk in the space that makes sense, near others who are directly related to the new hire's work.

Computer and phone. Have your IT people set up computers, laptops, tablets, mouse and keyboards in the days before your new hire starts. This is also a great time to make

sure the phone is set up with your new hire's extension and passcodes to use it right away.

Permissions. Set up any software, assign accounts, logins and passwords your new hire will need for email, Internet, Intranet, shared drives and training software.

Tour your office building. Of course your new hire needs to be able to get around

the place. Point out where the kitchen is—and the restroom, conference rooms, the water cooler, office supplies, where to park. This is a good time to offer up the ins and outs of the place so that new hires won't be wondering if they're parked in the right place or if there are plates and silverware to use in the kitchen.

Employee information, benefits, policies and forms. Employees need to know which benefits are available and fill out those applications so they can start receiving benefits. You'll want to let them know about payroll and set up the direct deposit at this time. Also, policies like dress code, breaks and vacation should be discussed early on. Of course government forms need to be filled out, like W-4 and I-9. It helps if you

have HR software helping out to store all those forms electronically and signed with e-signature even before your employee's first day of work.

Extras. This is a time to give your new hires business cards, discuss uniforms if needed, company directory or map and the employee handbook. You can also go the extra mile by giving new hires a welcome gift, maybe a package that includes little extras, like a company t-shirt, the employees' favorite candy bar and even an unused pad of paper or box of pens. So yeah, they're just office supplies they'd need anyway, but bundling it up all together makes it feel like a present and lets them know you're excited they're there. You should be celebrating your new hire's arrival!

as·sim·i·late

verb (used with object), as·sim·i·lat·ed, as·sim·i·lat·ing.

1. to take in and incorporate as one's own; absorb. The company assimilated the new hire onto their team.
2. to bring into conformity with the customs, attitudes, etc., of a group, company, or the like; adapt or adjust: to assimilate the new employee.

To assimilate, you need to bring new employees onto the team, and your team must accept them as their own.

Here are some things that you might want to consider when trying to assimilate new hires into your company:

People introduction. Depending on the size of your company, you can choose to do a roundtable to introduce your new employees and introduce yourselves to them. Even though they may not remember everyone's names and/or departments, it's still a good idea to show them you care enough to help them become part of the team. At BambooHR, we like to add something different, like favorite ice cream, the best piece of advice you've ever received or even if you could choose anyone else's job at the company, whose would it be? It's a fun way to bring the new hire in, let them learn about each other and let your seasoned people keep learning and having fun. It's a great way to introduce

your culture, and your new hires can feel it.

Assign mentor/buddy. Be sure to assign them "care-takers" or mentors that can help new hires feel they have a safe place to ask questions. It's recommended that person should be someone who is related in job function, like a member of the department, but not a manager, so they'll ask the questions they need to without worrying that it's too small or ridiculous to bother. This should be someone who's plugged in and in-the-know about the real way, not the handbook way. This enables the new employee to feel free to ask questions ranging from job responsibilities

to company culture and expectations. Plus, this gives the new employees another person who's invested in their success; a seasoned employee who knows the ins and outs.

Lunch on first day. It's a good idea to pull your new employees out of the office and take them to lunch on the first day. This way they can unplug and digest the sheer amount of information that's been thrown at them. Plus, it gives you an opportunity to really delve into important topics and show your new employees that you're invested in them. And don't underestimate the value of eating out and getting to know them and their lives, in a fun atmosphere outside of the office setting.

Individual team member meetings. Meeting with appropriate department team members will illustrate how the new hire's work will fit in with the rest of

the company and how they'll be working together.

Job duties, expectations, performance plan, goals. Employees need to have crystal clear ideas about what their job duties and responsibilities are. Set the expectations you have for their position.

Company vision and individual career path. It's important to start day one with focus on the vision of the company and the "why" behind your company. New employees need to be sold into the why as well. Show them why you're passionate about your company, and they'll feel it too. That's one of the most important things you can do in the first week. In addition, new hires want to see how their personal dreams and career will fit into the company's vision. It's important to see how those visions align and understand how the individual's success means overall success.

One respondent said they would have stayed at a job if he had received, "Clear information about future role."

"Managers [must] take onboarding personally. It is their responsibility to take their new employees to lunch on day one and to make a "personal connection outside of work".

—George Brandt, Forbes

ac·cel·er·ate

verb (used without object), ac·cel·er·at·ed, ac·cel·er·at·ing.

1. to move or go faster; increase in speed.
2. to progress or develop faster.

You must “strive to help [your] new employees absorb a lot of information—at their own speed.”

—George Bradt, *Forbes*

The next important step is getting your new hires up to speed and productive quickly. Some people may think that means stuffing new hires with as much information as they can as quickly as possible, but that will probably overwhelm your new hires. It's actually more helpful and productive if you can give new hires what they need in a manageable, steady stream. If you're trying to do onboarding well, so that you'll be able to retain your people, then consider what will help your new hires get to be productive in a way that works for your people and that will, ultimately, benefit your company.

One respondent said: *“I needed one-step-at-a-time learning.”*

Here are some ways you can help new hires to accelerate on the road to success:

On-the-job training. The manager needs to be the person who facilitates training but doesn't have to be the only one. It's important also to give the new hires training on the industry and make sure they understand the lingo you're all using around the office. Your new hires want to be productive. Give them the chance to be!

Department specifics. Processes and protocols are different at every company. New hires need to understand the way things work at your company. This includes everything from who they will be reporting to and what their responsibilities will be to how their work will be measured.

Early feedback. You have to be giving feedback on a new hire's early work. People need to feel you're investing in them and their success at your company. How are they to know if what they're doing is up to expectations if you're not checking out their work and telling them if it's right or guiding them in the right direction? And if they are picking things up fast and exceeding your expectations, tell them!

Clear vision of expectations. Help new hires understand what success looks like: Is it the amount of leads they get? Or is it that they don't mess up this part of a project? They need to understand what you're looking for. Make sure to repeat your expectations, check for understanding and find out if they prefer written or verbal communications. Knowing these things will help with the communicating expectations and set new hires up for success.

Recognition. It's never too early to start telling new hires what they're doing right. It's not just about saying thank you; it's saying what they're doing well so they know how to repeat the behavior in the future. Be specific.

Follow up. Make sure to check in, often and with specific questions to make sure the new hire truly understands expectations and projects. Ask them if the pace you're training them is working for them so they don't feel overwhelmed. Slow down or speed up as needed.

Assign team project. Let your new hire take a stab at the work early on. First, it's great to see new innovative ideas and a fresh perspective appear before they start mimicking the way others at your company are doing it. This can be a great way to learn a new or different approach to something. 43 percent of respondents said they would get up-to-speed and productive more quickly by starting new projects.

New hires want an onboarding process that helps them reduce the learning curve in becoming an effective, contributing team member.

One of the simplest ways to set new hires up for success is to make sure they're getting the on-the-job training they need.



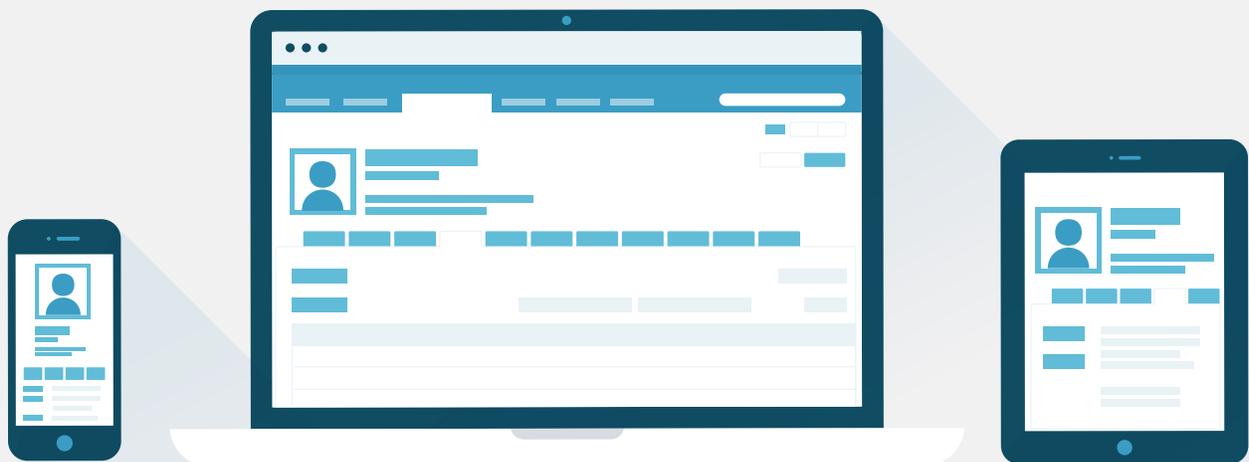
52 percent of respondents said that “receiving organized, relevant and well-timed content” is the most important aspect of the onboarding process.

“The only way to get this level of personal commitment from them is for you and your managers to commit to them personally, starting with how you onboard them.”

—George Bradt, Forbes

HR software allows you to automate some of the to-dos of onboarding so you can focus on getting your new hires comfortable, acculturized and productive!

Software does so many, many things. Your core HR software can help you stay organization with the tasks involved in onboarding.



Here's the onboarding checklist that comes standard with BambooHR software to make sure nothing slips through the cracks:

Bamboo HR Onboarding Checklist

Permissions

- Logins created for technology platforms
- Assign permissions for each platform

HR

- Welcome phone call
- Welcome survey
- Technology needs survey
- Introduction email
- Phone ext in BambooHR directory
- Office Tour
- People Tour
- Culture meeting with HR
- Benefits
- Payroll
- Time card
- Week 3 meeting with HR

Manager

- Team introductions
- Expectations and resources
- Lunch on first day

Office

- Assign work space
- Key Card
- Office supplies
- Swag

IT

- Computer set up
- Software installed
- Phone/Ext/Headset
- Monitor(s)
- Keyboard/mouse

BambooHR

- BambooHR login
- Directory Picture
- Job information
- W-4
- I-9
- Company Policies
- Benefit enrollment forms

It's nice to have a list to tell you what exactly needs to be done. Mentor. Check. Equipment. Check. Government forms. Check.

HR software can also help you track trainings for your new hires to ensure they're getting everything they need up front.

It's important to learn from what we—and others—have done in the past so we can do better in the future. That's why we collected this data. The war for talent is fierce. We're always working on our onboarding to keep our new hires well beyond those first six months.

Can you fix an onboarding nightmare?

Here are some ideas to re-route if you realize a new hire is almost to the breaking point:

- Acknowledge the mistake.
- Find out what's lacking.
- Create a plan.
- Team members can step up.
- Make the time to fix it.

How can you make a difference in your onboarding today?

Start with what you have. What can you do today? Don't get overwhelmed by everything you should be doing. Pick one thing, and get better at it. Then after you get that, add to it. Learn from your mistakes along the way and adjust. Do what's actionable today.

You see, when new hires leave, they lose very little. In fact, that week or month-long stint

at your company doesn't even have to go on the resume so it won't show up as a job hop. But when you consider all the time, effort and money you've invested in your new hires, your company has a lot more to lose. If new hires leave, then you have to start the process all over again. You have to dust off that job listing and begin the journey all over again.

Take a close look at how you're onboarding today. Ask your employees what you could do better. What are you doing that's making an impact for good? Do you have ideas but are waiting for the right time? Do your employees have thoughts about what would have helped them feel more committed from day one?

Why not take that advice, those ideas and try them out? Start with your next new hire.

Your new hires will thank you for setting them up on the path to success and your company will be well on its way to turning those new hires into seasoned employees.

Is it time to revamp your company's onboarding strategy?





About the Research

The February 2014 study collected responses via an online survey from 1,005 individuals who are currently employed, over the age of 24, and located in the U.S. This research was generated by BambooHR.

If you'd like to try out BambooHR free to see if it can help you onboard new employees and track their data, check us out!