Square Onboarding Step-by-Step

A case study by Brielle Rajkovich
August 23, 2016

I joined Square when the company was fewer than 100 people. My first day I was given a computer, a desk, and told to get started. The closest thing I had to an onboarding process was being told to talk to the head of Information Security. He shared several security protocols and asked if I was going to violate any of them. My response was, “Of course not,” although I was not 100% sure what he was talking about.

It was clear to me we needed a more efficient process for getting new hires up to speed, while also creating a more holistic and inviting experience. Fortunately, Square saw the value of an onboarding lead, particularly because our team was growing so rapidly. Below is a walk-through of the onboarding process we helped build.

OVERVIEW

We think about onboarding at three levels: the company, the team, and the individual. At Square, we focused the first week of onboarding at the company level. To begin, we wanted to help employees understand the vision of the company, learn about our product, attend company-wide meetings, and understand how work gets done.
The team level was introduced during the first week, but new hires really dove into it during the second week. Team level included things like where your responsibilities fit within the group, your team’s goals, and meeting schedules.

At Square, the onboarding started during the second week and came to the forefront as the new hire settled into their role.

PRIOR TO START DAY

Two weeks prior to their start day, new hires received an email with information about the first week: the schedule, the activities planned, as well as all the forms they needed to fill out and bring with them. The main objective of the e-mail was to set expectations and spare them a deluge of paperwork on the first day. After some time, we automated this through our HRIS, but in the beginning the IT team built an internal tool to handle the process.

DAY ONE

The first day was all about setting people up for success: introducing them to co-workers, going on tours of the office, and helping them feel comfortable with the work environment. We then hosted group sessions in classrooms where each team lead, such as HR or Legal, would talk to the group about his or her department.

We also set up new hires with a buddy from their team, who became their primary point of contact. This person was also their lunch buddy, which helped avoid the "new-kid-in-the-school-lunchroom" scenario. At the end of the first week, buddies would accompany the new hire to Town Square, our name for company-wide meetings.

Throughout the first week, we also set up everyone's computers and hosted email efficiency classes, including tips for configuring inbox filters and walkthroughs of internal tools. We found a lot people felt overwhelmed and anxious about simple things like how to schedule a meeting, but were embarrassed to ask for help. By addressing these concerns head on, we saved everyone a lot of headache down the road.

WEEK ONE: TUESDAY–FRIDAY

Tuesday and Wednesday were half days in the classroom to give people time to process all the new information. During their time with us, they continued to hear from team leads, who gave 30–45 minute presentations about their vision and values. We tried to make the sessions as interactive as possible. For example, our design lead would do an interactive design thinking session, and the CFO would review company-wide metrics, including what was working well and opportunities for improvement.

Thursdays we left open so new hires could focus on getting to know their teams. We also urged new hires to spend the day meeting people throughout the company. We find it's important to forge those connections early because, as routines get established over time, people are less likely to reach out to someone they don't know.

Finally on Friday evening, new hires would be introduced to the whole company at our all-hands meeting.

Throughout that first week, we wanted to get the message across that we value our employees for their authentic selves and what they contribute to the company. This message is important to share with new employees, for the success of the company, as well as employee satisfaction.

I've overheard people bring guests to the office and give the same welcome speech I shared with them on their first day. They walk people around, point out the significance of Square's set-up, and share the founding story. These are all things they learned during their first week of onboarding, and it's rewarding to see how it stuck with them.

BEYOND THE FIRST WEEK

After the first week, onboarding was focused on getting a new hire situated within their team and in their individual role. We worked with each team to build an onboarding process specific to them. This ensured that the new hire's transition was less abrupt from company-wide to team-focused onboarding. The manager usually designated someone from the team to make sure the process was up to date, including documents that covered details such as how often team meetings occurred, the team's structure, individual responsibilities, communication styles, past work, and the team roadmap.

At the individual level, managers were responsible for introducing new hires to their role, including day-to-day duties and how their work contributed to the success of the team and company. We also did check-ins at 30, 60, and 90 days after a new hire's start date. The 30-day was in person and the 60- and 90-day check-ins were done via surveys.

EXECUTIVE ONBOARDING

Executives went through a similar onboarding process, with a few additions. We provided welcome packets that introduced them to key information about Square, including company goals, the teams, and core metrics. The packet also included the founding story and significant moments in the company's history.

One of the most important things we learned about onboarding executives is that they want to jump in and take action right away. We found, however, that they are more effective in the long run when they spend their early days learning, listening, and observing. One way we supported this behavior was by setting up roundtable sessions for new leaders and their teams, typically followed by a happy hour. Additional ideas came from a book an executive brought with her, *The First 90 Days*, which we gave to all new executives on their first day.