



Launching a Successful Onboarding Initiative

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Agenda

What is Onboarding?

Why is Onboarding so important?

Approaches

The 5 C's of onboarding

There's more than new hires

Activities to Maximize Onboarding's Effectiveness

What is onboarding?

Onboarding, by definition, is the action or process of integrating a new employee into an agency

Oboarding consists of:

- Orientation
- Paperwork
- Coaching/Mentorship
- Support tools

Why is Pre-boarding important?

- Many new hires have interviewed with several organizations and are still employed when they accept your offer. The sooner you start immersing them in your culture the stronger their connection will be.
- New hire paperwork may be able to be completed prior to day 1 so that when they come in on their first day they can hit the ground running rather than spend the whole day completing paperwork.
- Preboarding activities are not just for the new hire. It can also include the setup of the new hire's workspace so the new hire has a warm welcome and a space that's ready for them!

Why is Onboarding important?

- Eliminate errors in paper processing.
- Create clear expectations early on in the employee's life cycle, this helps to boost performance.
- Promote commitment to the overall organizational goals.
- Decrease turnover
 - 86% of respondents to a survey, conducted by the Aberdeen group, felt that a new hire's decision to stay with an organization long-term is made within the first six months of employment.
- Ultimately onboarding programs improve the bottom line for the agency.

Benefits of Onboarding

- Short term

- Self confidence
- Role clarity
- Social integration
- Knowledge and fit within the organizational culture

- Long Term

- High job satisfaction
- Organizational commitment
- Lower turnover
- Higher performance levels
- Career effectiveness
- Lowered stress



What is your onboarding approach?

Informal

Onboarding without an explicit organizational plan

Formal

Onboarding with a documented procedure

- Passive
- High Potential
- Proactive





What's your approach?



The C's of Onboarding

5 C's should be used in every successful onboarding initiative

- Compliance
 - Forms and policies
 - Clarity
 - Set expectations
 - Culture
 - Company personality
 - Connection
 - Teams/mentors
 - Check backs
 - Scheduled meetings to gather feedback
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How do you handle Compliance?

New hire forms

- I-9 and eVerify
Timing and consistency of the form and their processes are of the utmost importance
- Tax forms (Federal, State and even Local)
- Internal policies and acknowledgements
- Benefit enrollment forms
- Access to systems

What forms or processes are important for your agency to ensure compliance with your new hires?

Clarity of expectations for a new role

Clarity is more than the job description.

- Job Duties

Use the job posting to gather the details that were originally viewed by the new hire

- Individual Goals

Even better if you can show how their goals relate to the department or the overall agency goals

How do you share this information with your new hires?

Create Early Connections

Introduce your new hires to their team as well as others within the agency. Mentors are a great way to start introducing your new hires to key members of their team.

Mentors are great for answering questions, helping navigate the informal processes within the department and even facilitating additional connections.

Mentor tip - Schedule a day 1 lunch with the new hire and their mentors.

Who would your agency's new hire mentors be?

Showcasing Culture to New Hires

The culture of an agency is truly its personality. Culture is important to new hires, because employees are more engaged when they fit in with the agency's personality.

Every agency has their own DNA, helping to showcase this to a new hire will help them fit in quickly.

What makes your agency unique?



How do you make the day 1 special?



Don't forget about Checking in on New Hires

Just because the new hire has completed orientation and paperwork doesn't mean they are a seasoned employee.

Only 37% of organizations extend their onboarding past the first month.

The Aberdeen Group 11/17/2014

Schedule check ins throughout the first year to ensure they are:

- Making progress on their goals
- Completing trainings
- Making connections to peers
- Fitting in with the culture of the team and the agency as a whole

How often are you checking in?

Onboard Timeline

Promoted employees can be onboarded too!

Just like a new hire is in a new role the same is true for an employee who's been promoted.

What is the focus of Promotional Onboarding:

- Compliance - the policies and documents relevant for their new role
- Clarity - the new job duties and goals
- Culture - the DNA of their new department
- Connections - making connections with their new teammates
- Checkback - ensuring that the change is going smoothly

Don't forget about Offboarding

Offboarding is not only terminations but also retirees.

Why is Offboarding important?

- Former employees will always represent your brand. They can either be promoters or detractors
- Former employees can be great sources of referrals as they understand your agency DNA and can recommend others that they think will fit
- The boomerang employee. An employee may work as a seasonal employee or an intern while in college and later in their career they may look to come back.

What should be included in Offboarding?

Termination of medical benefits

- How to enroll in Cobra if there is a lapse in coverage

Retirement/401K

- How to rollover
- How cash out

Formal work hand over

- Transfer of knowledge
- Transition of any responsibilities

Collection of assets

- Physical
- Termination of licenses or access

Managing final paychecks

Exit interviews

How do you manage
Offboarding?

Best Practices for Onboarding

- Engage the new hire prior to the first day
- Make the first day special
- Create formal orientation
- Onboarding is not just for HR and the new hire
 - Make onboarding new hires a team event! Include managers, IT and Operations team members
- Ensure consistency within your onboarding process
- Create a buddy or a mentor program
- Review and update your onboarding program over time
- Use technology as a part of your process

More Best Practices

- Check-in with new employees on key milestones
 - First Day
 - 30 Days
 - 60 Days
 - 90 Days
 - 120 Days
 - 1 Year
- Clearly communicate objectives, timelines, roles and responsibilities to new employees



Don't forget the other processes

Promotions



Offboarding



Q & A

