

Onboarding 101

What you need to create an awesome onboarding experience for your new hires.



Introduction

Having a well organized onboarding experience for your new employees is crucial in ensuring their continued success in your company!

This guide will outline some steps and must haves for implementing a successful onboarding experience for your new hires.

- 1. Get Your Team Involved**
Engage your team and ask for their ideas.
- 2. Company Mission**
Define the mission and values for the company.
- 3. Onboarding Checklists**
Outline what needs to get done for new hires.
- 4. First Day Experience**
welcome your employee
- 5. Frequent 1-on-1s**
Keeping your employee engaged
- 6. Annual Reviews**
See how the employee is doing

1 Get Your Team Involved

Engage your team and ask for their ideas.

Before launching the program, ensure your existing employees are made aware of it, ideally through a town-hall type meeting and not through less personal methods like emails or memos.

In the town-hall, encourage your employees to provide suggestions on how to make the program a success. You can also use the meeting to solicit any possible peer mentors for new employees. These should be positive-minded employees who would enjoy an opportunity act as leaders, willingly participate in the program, and encourage/arrange for the new hire to socialize with others in the company.

For onboarding to succeed all parties have to appreciate how much the program means to the company and why.



2 Company Mission

Define the mission and values for the company.

Having the company mission and values clearly defined helps establish the culture for your company. It's essential for new-hires to get a good understanding of why the company does what it does.

A good company mission statement should be able to convey the company's purpose quickly and effectively. You should try to highlight what makes your company unique in solving a problem within your industry.

Example: Ikea's Mission Statement

At IKEA, our vision is to create a better everyday life for the many people. Our business idea supports this vision by offering a wide range of well-designed, functional home furnishing products at prices so low that as many people as possible will be able to afford them.

Example: American Express

At American Express, we have a mission to be the world's most respected service brand. To do this, we have established a culture that supports our team members, so they can provide exceptional service to our customers.

Example: Google

To organize the world's information and make it universally accessible and useful.



3 Onboarding Checklist

Outline what needs to get done.

It's a good idea out create an onboarding checklist so nothing slips through the cracks for new hires. Common things that need to be done can include:

- **Offer letters and agreements templates** are first step to getting your new hire onboard. These documents are critical in establishing a clear agreement between the employee and company on topics such as job expectations, compensations, non-disclosures etc.
- **Send a welcome letter** to the new hire before their start date. Include links to any videos on the company, information about dress code, work hours, parking or transit information, local restaurants, what to expect the first day and who from the company will greet them/take them to lunch.
- **Collecting information and documents** such as government forms (I-9, W4 etc), payroll info, benefits info, and employee agreements. Mail or email these documents to the employee prior to their start date.
- **Equipment, supplies & services** checklist should outline everything the employee needs for their job, including items such as a phone, computer, email address, passwords, security pass, stationary etc.
- **Establish a frequent feedback schedule** between the employee and their manager. This is a vital step in ensuring that your team member stays engaged and is kept aligned with your company's mission, goals and values.



4 First Day Experience

Make your employee feel welcome and well prepared.

It's day one, and your employee is coming into the office for the first time. Here's an idea of some things you can do to make that day a great experience for him or her.

- Greeted by the person outlined in the welcome letter
- Shown their workspace and introduced to team members, managers, and their mentor
- Provide access to any necessary training materials
- Taken to lunch, or participates in an internal lunch with team members as a way get to know everyone.
- Encouraged to make use of their mentor, and provide feedback on the process

Additionally, an email should be sent to all employees announcing the new hire and encouraging people to drop by and introduce themselves. The mentor should also help facilitate introductions.

The employee's manager or HR should clearly explain the company's culture, values and goals, what they do for their customers, the employee's initial duties, long-term goals and performance expectations.

5 Frequent 1-on-1s

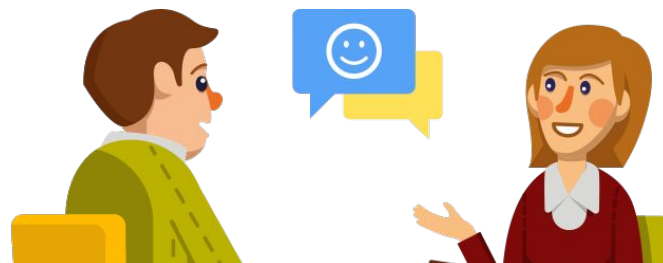
Keep your employee engaged.

At the end of the first week, the employee should have a check-in with their manager and HR to get and give feedback on their overall experience thus far.

Moving forward, the employee should have a frequent check-in meeting with their mentor or manager. It's a good idea to do these every 2-4 weeks on a schedule both manager and employee agree upon. Doing this has proven to keep the employee engaged and aligned over time, and allows the employee and manager to discuss any issues or concerns involving the employee.

Some example questions you or a manager can ask the employees are:

1. How's it going? How do you feel in your new job?
2. What are you enjoying most about your role?
3. Is the job/team/company what you expected?
4. Has anything surprised you? If so, what?
5. Has training been helpful? What would you add or change?
6. Do you have all the tools and resources that you need?
7. Do you feel like you have gotten to know your co workers well?
8. Do you feel out of the loop about anything?
9. What should we provide to new employees that we have missed?
10. What is working/not working?
11. Is anything about your role, the team or company still unclear?
12. How can I be a better manager to you?



6 Annual Reviews

See how your employee is performing overall.

After the employee has been with the company for a year, both parties should have a good idea of the employee's role, performance, and contributions within the company. At this point, there should be a discussion with the employee about their long-term career plans, prospects within the company and overall satisfaction with their role.

If the relationship is to continue then a plan should be put in place for future development, shifting the focus from on-the-job training to ongoing professional development.



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