

SB&
ASSOCIATES

MINI GUIDES

Creating an
**ONBOARDING
PROCESS**

[that works]

BEFORE WE BEGIN

WHAT IS EMPLOYEE ONBOARDING?

Employee onboarding is the **process of integrating new employees** into your company

WHY IS THIS IMPORTANT?

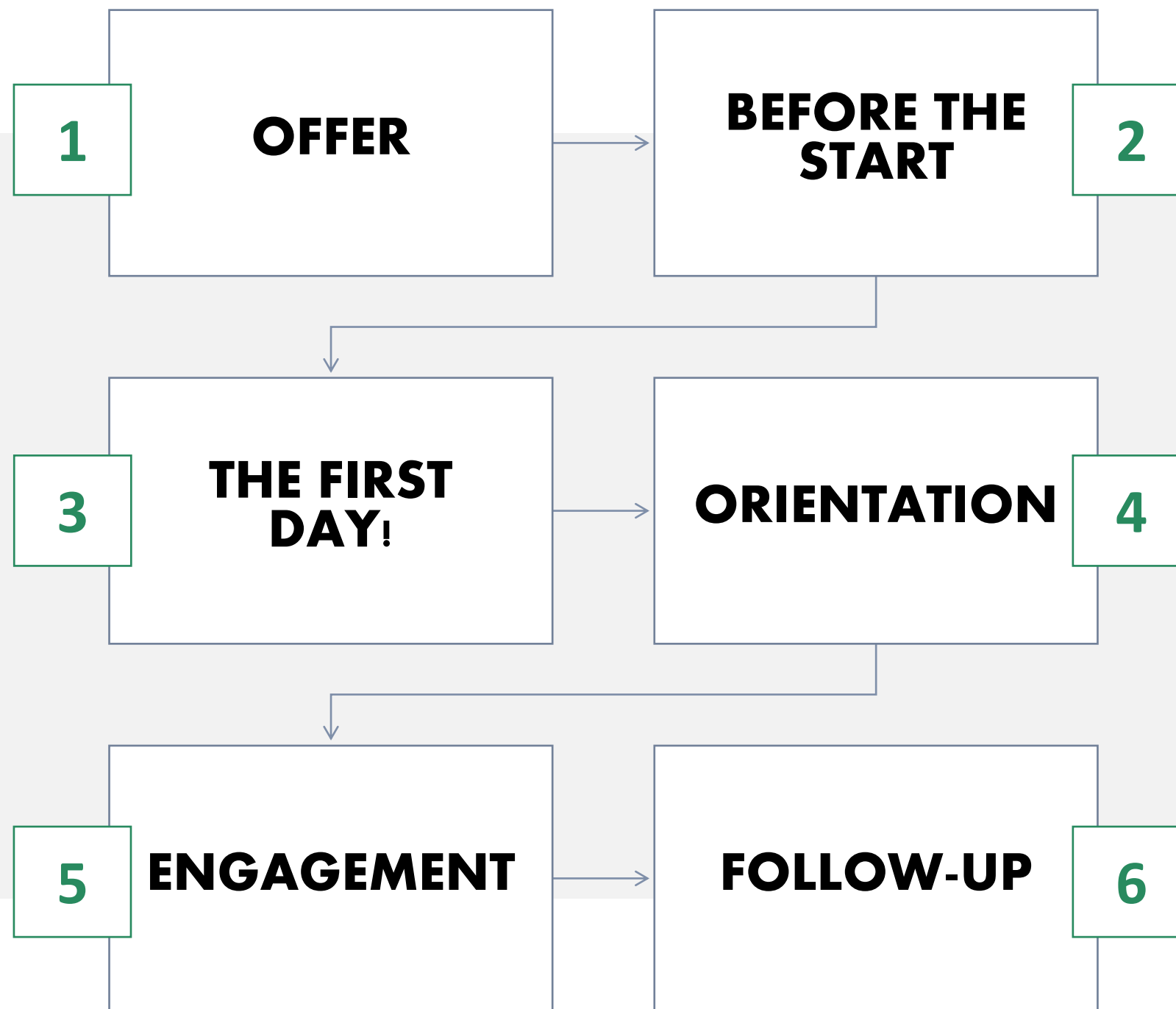
The goal of an onboarding process is to help new people **integrate faster** and **making an impact sooner**.

It increase transparency and boosts the new employee's **motivation and engagement**.

In the long run, it helps increasing talent retention and the overall employee experience.

LET'S SEE WHAT A GOOD ONBOARDING PROCESS MAY LOOK LIKE!

THE FLOW



Onboarding begins before the first day on the job!

While the length of the process can vary, these are some fundamental milestones to ensure its impact and success.

See the next pages for more detailed checklists for each step.

Step 1: THE OFFER

CHECKLIST



- Clear JOB DESCRIPTION
- Phone calls with the candidate
- Share info on JOB PROFILE
- SALARY negotiations and offers
- Follow-ups

Let the candidate know what **duties and tasks** they will be performing!

Keep in touch. Emails are great, but phone calls allow for a more personalised approach.

Let them know how their **performance** will be evaluated, and what the **development goals** and milestones are going to look like!

An usual suspect - the key is ready to have clear ideas about what can be offered, and what are the boundaries to the negotiation

Don't disappear. Establish yourself as a great employer by keeping in touch, regardless of the result of this phase!

Step 2: **BEFORE THE START**

CHECKLIST



- Prepare paperwork
- Employee Agreement/Contract
- Employee Handbook
- Coordinate with other stakeholders
- Follow-ups

Make sure you have **everything ready to go** for when they'll join the team. Is everything consistent?

Review and prepare the contract to make sure that there are no surprises for either you or them!

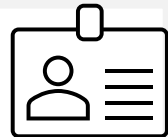
Share your handbook: it will give them an idea of **what daily life looks like in your company**. Let them ask you questions!

Make everyone aware that a new member is coming onboard. Is there anything others can do to prepare for their arrival?

Keep the communication channels open. The candidate and the internal stakeholders may have questions!

Step 3: THE FIRST DAY!

CHECKLIST



- New employee welcome email
- Introduction with team
- Schedule time for paperwork
- Formal onboarding meeting with HR
- Lunch plan!

Make it an event! Let everyone know that the new colleague is starting today. Why miss a chance for a little boost to morale?

Time for a tour and some introductions. This will help because **not everyone is equally comfortable around new people.**

Take the proper time to get the paperwork sorted out right away. **No point in waiting.**

A meeting with HR is a good chance for the newcomer to **ask questions** – maybe a chat about vision, mission, values?

We are all humans, not machines. Create a relaxed environment by inviting some key people for lunch with the new colleague.

Step 4: **ORIENTATION**

CHECKLIST



Topic-specific meetings

Are there experts that can contribute with their **specific knowledge**?
Get them to talk with the new colleague.



Shadowing and mentoring

Learning by doing is great and necessary. But adding a mentoring or 'buddy system' can make a real difference!



30 – 60 -90 day planning

Help the new colleague create a plan with clear goals so that they **do not feel lost while they get used to the new team**



Training

This starts here, and continues even after onboarding. Help them acquire the **skills** they need (and **enjoy the new job!**)

Step 5: **ENGAGEMENT**

CHECKLIST



Week 1: Regular check-ins



30-60-90 days check-ins



Feedback!

How are things going? Any concerns?
Anything you or anyone else can help with?

They had a plan – **make sure you support them throughout.** A check-in costs nothing and is really, really helpful.

Get them to share their thoughts, ideas and observations. Fresh eyes may point out something that was overlooked!

Step 6: **FOLLOW UP**

Is everything on track?

Depending on your role, you can follow-up in many different ways. The key point, however, is that onboarding is a critical time: **it sets the tone for the whole journey** and as such, showing empathy and support will make a huge difference in the new team member's experience.

Key TAKEAWAYS

Communicate,
communicate,
COMMUNICATE

The onboarding phase is not easy for most new hires.
It can be difficult to feel a sense of belonging.
Knowing that the communication channels are open makes an enormous difference.

Set clear
EXPECTATIONS

Transparency and understanding of what one is expected to do, how and when go a long way in making people feeling like they know what they are doing. At the same time, it helps them to understand what they can expect from the new company, too.

HAVE A PLAN

Plan ahead. Be prepared. Make sure that things are set up for success.
What will the candidate need to know to make a sound decision about your offer?
What does a new hire need to get up and running as quickly as possible?
Are there issues that can be addressed before it's too late?

Do you have **everything you need?**

Here is a list of the various things you'll need to set up a great Employee Onboarding process.

The SB&A team can help you design and set up all of these things, and more. **Need any help?**

GET IN TOUCH!

JOB DESCRIPTIONS and JOB PROFILES

Employee Handbook

VISION, MISSION, VALUES statements

Job shadowing and mentoring systems

Training & Development

GOALS setting and PERFORMANCE MANAGEMENT

Individual and team development planning



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