



## HIRING, ORIENTING, AND ON-BOARDING NEW EMPLOYEES FOR RETENTION & SUCCESS

*A Primer for Human Resources, and Supervisors*




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1



### TODAY'S PRESENTER




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2



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3



## HIRING PROCESS ESSENTIALS



4

## POMS STEPS TO MAKING A GOOD HIRE

### 1. UNDERSTAND WHAT YOU WANT FROM THE POSITION

- All too often, we rush to fill a vacancy, without doing workforce planning to determine how the job may change in the future, and what you will need from that position.
- Start to assess the skills and expertise you will need to recruit for.
- Monitor job trends in your area and industry to identify the most popular job titles and keywords job candidates are searching for, and compare salaries to determine the right compensation level for your role.
- To help lay the groundwork for writing a competitive job posting, come up with a list of the key job duties your new employee will be responsible for and think about the characteristics your ideal candidate will have.

5

## POMS STEPS TO MAKING A GOOD HIRE

### 2. CREATE A STANDOUT, OUTCOMES-ORIENTED JOB DESCRIPTION

- Whatever the state of your hiring market and whatever position you're hiring for, writing a detailed, compelling job description is critical to your success in recruiting top talent.
- If it's a new role you're trying to staff, carefully consider the tasks you want the employee to take on in both the short term and long term, and the levels of education and experience your ideal candidate should possess.
- If you need to hire an employee for a vacated role, take the opportunity to evaluate whether you want to make changes to the position. Chances are you'll want to add or shift some responsibilities, especially if the job description has not been updated recently.
- Pay attention to clearly defining the minimum required, and preferred requirements of the position - education, experience, knowledge, skills, and abilities.

6

## POMS STEPS TO MAKING A GOOD HIRE

### 3. DEVELOP A RECRUITING STRATEGY THAT FITS THE POSITION

- Cast both a wide, and a targeted net whenever possible.
- You want to post the opening on your website and on job boards that cater to your company's industry. But you should also share the job ad on your company's social media accounts, as well as social media accounts of key employees.
- Look for professional associations or other similar groups where you can send recruiting notices.
- You may also want to ask your team members, as well as trusted contacts in your professional network, for referrals. They can often be a great source of promising leads, including professionals who may not be actively looking for a new job, but might be open to considering a new opportunity.

7

## POMS STEPS TO MAKING A GOOD HIRE

### 4. DON'T SHORTCHANGE THE REVIEW OF APPLICATIONS AND RESUMES

- Reviewing resumes and other application materials is a tedious and time-consuming part of the hiring process. Be thorough to determining whether a candidate's qualifications align with the criteria for the available position.
  - Filter out applicants who don't match the key job requirements by sending them a rejection email (Indeed has a built-in rejection message you can send with the click of a button!).
  - Look for keywords and phrases that match those in the job description. This will show whether the candidate studied your posting and took the effort to speak directly to your needs.
- Carefully review candidates' technical skills, but also look for evidence of their soft skills, be it in the clarity of their writing (as demonstrated in their resume and cover letter), or in the details of their professional history (experience presenting at team meetings, for example, or in cross-departmental collaboration).
  - Be sure to look for how impactful the job seeker was at their current or past role.
  - Do they clearly explain the added value they brought and how they helped meet company goals?

8

## POMS STEPS TO MAKING A GOOD HIRE

### 4. DON'T SHORTCHANGE THE REVIEW OF APPLICATIONS AND RESUMES

- To determine which resumes should be added to your “yes” or “maybe” piles, look for the following clues that tell a story about the candidate’s motivations, experience and work style:
  - Quantitative evidence of a candidate’s past achievements
  - Longevity at past roles although “job-hopping” may be common depending on the industry
  - Clear career progression
  - Attention to detail (is the resume riddled with grammar and spelling mistakes?)
  - Skills and experience that are tailored to the job description
- After reviewing resumes, communicate with your top candidates to learn more about their qualifications. This will help you create a short list of the best candidates and decide who should move forward in the hiring process.
- You can send emails to learn more about your candidates’ experience or start scheduling phone screens and interviews.

9

## POMS STEPS TO MAKING A GOOD HIRE

### 5. INTERVIEW YOUR TOP CANDIDATES

- When interviewing candidates, start with a quick 15 to 30-minute phone screen to find out if they meet the basic job description and to determine if there is a mutual fit. Then, invite at least three of your most promising candidates to an in-person interview.
- Ask strategic questions that reveal their skills and qualifications, important personality traits and level of enthusiasm for the role and company.
- The interview can be structured or unstructured, depending on the types of information the interviewer seeks. The three most common approaches to interviewing are:
  - **Behavioral and competency-based approaches.** Behavioral and competency-based interviewing both aim to discover how the interviewee performed in specific situations.
  - **Situational approach.** The situational approach is an interview technique that gives the candidate a hypothetical scenario or event and focuses on his or her past experiences, behaviors, knowledge, skills and abilities
- Take notes immediately after each interview so you’ll remember the strengths and weaknesses of each candidate more clearly when it’s time to make your final hiring decision.

10

## POMS STEPS TO MAKING A GOOD HIRE

### 5. INTERVIEW YOUR TOP CANDIDATES

- Zero in on both technical know-how and interpersonal qualities during the job interview.
  - Open-ended and hypothetical interview questions allow the candidate to discuss their experience and skills, while giving you opportunity to assess their analytical and verbal skills, tact (how they talk about a current or past employer, for example), diplomacy (how they describe interactions with other teams) and other soft skills.
- Pay attention, too, to how well the candidate prepared for the interview by testing their knowledge of your company and industry.
- Aim to hire an employee who embraces the company, not just the job and paycheck.
- **Interviews are a two-way street:** You want to find the most qualified person for the job, but a candidate will want to be equally excited about joining the team.

11

## POMS STEPS TO MAKING A GOOD HIRE

### 6. CHECK REFERENCES

- Checking references is an important way to gain additional insights, verify skills and ensure that you’re hiring employees who are being honest about their work experience and qualifications.
  - Request at least three references from your top candidates and give them a quick call.
  - You are NOT limited to checking references from the people the applicant has given you.
- Ask your candidate’s references open-ended questions such as:
  - Can you confirm the candidate’s job title, responsibilities, start and end dates, etc.?
  - How long have you known/worked with the candidate?
  - Tell me about what it’s like to work with the candidate.
  - Tell me about how well they worked with their colleagues and members of your team.
  - Can you tell me about some of their accomplishments in the job?
  - What are their biggest strengths and weaknesses?
- Seek confirmation of accomplishments, particularly those revealed in the behavioral/competency-based interview questions.

12

## STEPS TO MAKING A GOOD HIRE

### 7. KEEP YOUR RECRUITMENT EFFORTS ORGANIZED AND ON TRACK

- Keep your process moving - you don't want to lose prospective new hires because it takes too long.
- Organize your recruitment efforts and keep track of interesting candidates as they move through your hiring process.
  - Actively track the status of all applicants and active candidates (New, Reviewed, Phone Screened, Rejected, etc.) and maintaining accurate, detailed notes of each of your candidate's strengths and weaknesses.
  - If you are an affirmative action employer, maintain applicant tracking in accordance with USDOL AAP requirements.



13

## STEPS TO MAKING A GOOD HIRE

### 8. SELECT YOUR CANDIDATE

- When you have multiple candidates that you think would be a great fit, choosing the right person can be difficult.
- To make a decision, reflect on what you learned about your candidates' skills, personality and experience from their resumes, interviews and references.
- Consider how your candidates will add to your team and company culture and compare notes with anyone else who was involved in the hiring process.
- It's important to think about what your business needs and choose the candidate who will help you achieve your goals.
- If there is more than one candidate who you would find acceptable to hire, rank order them before sending your recommendations to HR to make the official offer of employment.

14

## STEPS TO MAKING A GOOD HIRE

### 9. HAVE HR MAKE A CONDITIONAL OFFER OF EMPLOYMENT

- When you've selected your top candidate, it's time to extend a job offer.
- Before sending the official offer letter, email the candidate to set up a time to talk over the phone.
  - During the call, express excitement about inviting them to join your team and present the terms of your offer, including salary, benefits, start date, etc.
- If the candidate accepts your verbal offer, send an official written "Conditional Offer of Employment" letter, which will include information given in the phone call.
- A conditional employment offer is one that is contingent on the candidate fulfilling specific requirements for the job. These requirements commonly include such things as:
  - Background checks
  - Drug and alcohol testing
  - Reference and credential checks
  - Specific training requirements
  - Certifications and Education checks
  - Medical exams
  - Eligibility to work in the U.S. (Form I-9)
  - Signature line for acceptance of the conditional offer of employment


15

## STEPS TO MAKING A GOOD HIRE

### 10. NOTIFY REJECTED CANDIDATES AS SOON AS POSSIBLE

- According to a 2019 Indeed survey, 77% of candidates would have a negative perception of a company if they didn't hear back after applying.
- Once your selected candidate has signed the conditional offer of employment, and you are reasonably certain that they will be able to meet the conditions of the offer, you should notify the rejected candidates.
  - To avoid burning bridges, notify your rejected candidates as soon as you know they aren't the right fit.
  - Remember, if your selected candidate doesn't work out, you may want to re-contact these candidates.
- For candidates that have reached this far in the process, deliver a prompt, personalized rejection over the phone. Be honest but supportive by giving constructive feedback to help them understand why they were rejected, and wishing them luck with their job search.
- Follow up with a letter to the rejected candidates, particularly those who were interviewed.


16

 **STEPS TO MAKING A GOOD HIRE**

### 11. HANDLE YOUR LEGAL AND RECORDKEEPING OBLIGATIONS

- Upon receipt of an offer letter signed by the candidate and the successful completion of background checks, close out the requisition on the tracking report.
- Conduct post-offer/pre-employment background checks, drug & alcohol screening, FCRA report (if required for position), etc.
- Report new employees to your state’s registry.
- File DOL-required recruitment and hiring records - interview notes, selection records, applications, etc. (USDOL has 1-year retention requirement)
- Create new employee’s personnel file.
- Set up employee in HRIS and payroll systems

17

 **STEPS TO MAKING A GOOD HIRE**

### 12. GET READY FOR YOUR ORIENTATION AND ONBOARDING PROCESS

- Upon receipt of an offer letter signed by the candidate and the successful completion of background checks, close out the requisition on the tracking report.
- Conduct post-offer/pre-employment background checks, drug & alcohol screening, FCRA report (if required for position), etc.
- Report new employees to your state’s registry within 20 days.
- File DOL-required recruitment and hiring records - interview notes, selection records, applications, etc. (USDOL has 1-year retention requirement)
- Create new employee’s personnel file.
- Set up employee in HRIS and payroll systems


18




**BENEFITS OF A STRONG NEW EMPLOYEE ONBOARDING PROGRAM**



19

 **PLANNING AND CREATING YOUR ONBOARDING PROGRAM**

- The process of onboarding new employees can be one of the most critical factors in ensuring recently hired talent will be productive, engaged workers.
- Onboarding is often confused with orientation. Orientation is but one part of onboarding
  - Orientation is necessary—paperwork and other routine tasks must be completed
  - Onboarding is a comprehensive process involving management and other employees that can last up to 12 months.



20

### POMS PLANNING AND CREATING YOUR ONBOARDING PROGRAM

- Before implementing a formal onboarding program, you need to address some key questions to attain team and upper management buy-in, including:
  - When will onboarding start?
  - How long will it last?
  - What impression do you want new hires to walk away with at the end of the first day?
  - What do new employees need to know about the culture and work environment?
  - What role will HR play in the process? What about direct managers? Co-workers?
  - What kind of goals do you want to set for new employees?
  - How will you gather feedback on the program and measure its success?

21

### POMS PLANNING AND CREATING YOUR ONBOARDING PROGRAM

- Once these questions have been answered, HR professionals and management can devise a plan of action to help new employees quickly assimilate company policies and workflow while getting fully acquainted with the organization's culture.
- A lackluster onboarding process isn't cutting it during the "Great Resignation." With many companies struggling to find enough employees to provide fundamental customer service, they need to do everything they can to hold onto the new hires they're lucky enough to get.
- An outstanding onboarding process is the proven first step to lowering employee turnover, improving engagement, and boosting productivity. Small and mid-sized businesses are learning in 2021 that great onboarding is a key component of your company's success.

22

### POMS PLANNING AND CREATING YOUR ONBOARDING PROGRAM

- The onboarding process is one of the best opportunities for a company to communicate who they are and the values they embody with new employees. Companies and new hires both benefit from an effective onboarding process that infuses culture and mission from day one.
- A good onboarding process shows new hires what is expected of them; a great one shows new hires not only where they can fit, but where there is room to grow, contribute and thrive within the company.
- Unfortunately, only 12% of U.S. employees say their company does a good job of onboarding, according to a recent [Gallup research study](#).



23

### POMS THE BENEFITS OF AN ONBOARDING PROGRAM

- According to this [Gallup research study](#), employee engagement is a key factor in nine performance outcomes, including customer service, profitability, and turnover.
- Engaged employees are passionate about their work and they feel a strong connection to their company's culture and values. Employee engagement is all about the emotional bonds people form with their work. These employees will always outperform their peers who couldn't care less.



24

### POMS THE BENEFITS OF AN ONBOARDING PROGRAM

- You want your employees to show up on time, every day, and do their best work. You want them to go the extra mile for the customer. When they're on the manufacturing line, you want them to care—really care—about the quality of the goods they're producing.
- A robust onboarding process can have a significant impact on tangible outcomes:
  - 69% of employees are more likely to stay for at least three years after a great onboarding experience.
  - It also results in 20% higher engagement, 50% higher retention and 54% higher productivity when your onboarding process steps set clear expectations while also providing crucial support early on.



25

### POMS THE BENEFITS OF AN ONBOARDING PROGRAM

1. **Maximize retention and loyalty:** 69% of employees are more likely to stay with a company for three years if they experienced great onboarding.
2. **Strengthen company culture:** an effective onboarding process will help new team members understand the company's vision, mission, and values, and reinforce the expected behaviors and attitudes that collectively form the company culture.
3. **Foster belonging and inclusion:** 93% of respondents to Deloitte's 2020 Global Human Capital Trends survey indicated that a sense of belonging drives organizational performance. Great onboarding can dramatically reduce anxiety, and increase a new employee's sense of belonging to their new team.

26

### POMS THE BENEFITS OF AN ONBOARDING PROGRAM

4. **Maximize productivity:** only 29% of new hires felt they were prepared and supported to excel in their new role. But, according to research done by Glassdoor, a strong onboarding process can improve productivity by more than 70%, by outlining clear job and organizational expectations; reducing errors; and saving time and frustration.
5. **Minimize business risk:** there are employment contracts to sign, payroll forms to complete, and company policies and procedures to review. Most of these things are in place to protect both the business and the employee.
6. **Reduce costs of turnover:** according to SHRM's Human Capital Benchmarking Report, the average cost-per-hire in the United States was \$4,129, and on average took 42 days to fill a position. Great onboarding can create long-term employee engagement.

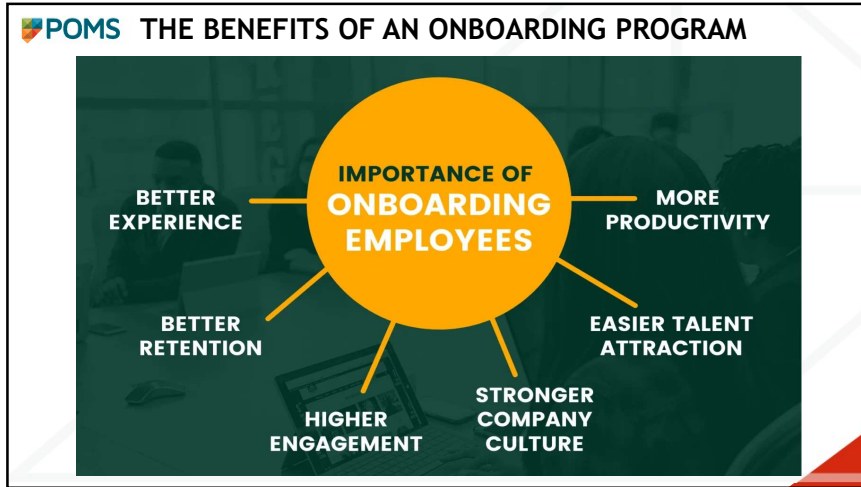
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### POMS THE BENEFITS OF AN ONBOARDING PROGRAM

7. **Attract top talent:** Sites like Glassdoor allow employees to share employment experiences with other potential candidates. Word will spread if you create a great onboarding experience that supports new team members when they join. Statistics show that 20% of newly hired employees tend to recommend employers to other people after they have had their onboarding process.
8. **Improved Profitability:** Other studies consistently show a positive correlation between engaged employees and a company's profitability, turnover rate, safety record, absenteeism, product quality and customer ratings.



28



29



30

- POMS KEY SUCCESS FACTORS OF AN ONBOARDING PROGRAM**
1. **Have a clear purpose:** have a clear vision for why onboarding is important, what experience you want a new hire to have, and even what you would like them to say on social media and public forums like Glassdoor.
  2. **Minimize surprises:** it can be difficult for anyone to walk into an unfamiliar situation and environment. Minimize surprises for the new hire, including everything from letting them know what the dress code is, to what their first day and week of work will look like.
  3. **Be prepared:** your new team member will show up on their first day ready to get started, and you should too. Start by putting a new hire checklist in place. Schedule meetings and training sessions in advance, get their computer equipment and workstation ready and prepare other team members to help.

31


- POMS KEY SUCCESS FACTORS OF AN ONBOARDING PROGRAM**
4. **Exercise patience:** your new team member will almost certainly make mistakes, forget parts of their orientation program, and miss a step or two as they get up to speed. “Patience is a virtue”, especially when it comes to onboarding new employees.
  5. **Set a reasonable pace:** no one likes drinking from a firehose, so avoid overwhelming them with too much information, which can lead to more important things being missed or forgotten. Try to remember how long it took for you to learn everything!
  6. **Provide resources:** introduce them to key individuals, and show them where resources like employee handbooks and policy manuals can be found.

32



**POMS KEY SUCCESS FACTORS OF AN ONBOARDING PROGRAM**

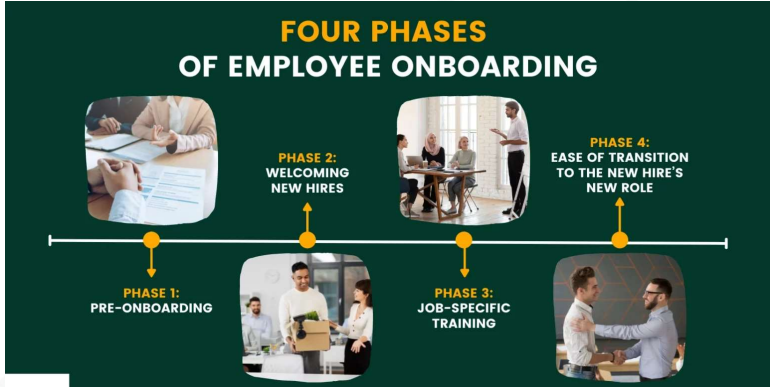
**7. Build-in flexibility:** Since COVID-19, a significant businesses trend has been to turn to remote work and other virtual practices. Build flexibility into your remote onboarding processes so that they can be quickly adapted to changing conditions and still feel connected.



33

**POMS FOUR PHASES OF AN ONBOARDING PROGRAM**

**FOUR PHASES OF EMPLOYEE ONBOARDING**



34

**POMS FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 1: PRE-ONBOARDING**

- Pre-onboarding starts as soon as the candidate agrees to the job offer. It goes on until the new hire's first day on the job. Take note that the pre-onboarding process is critical for every job candidate.
- Misunderstandings or miscommunications, no matter how small, can make candidates doubtful about their decision to be part of your organization. Then again, when these candidates are properly managed and updated on the developments of the organization, they become more excited about joining the team.
- It is important to help employees fill out and complete all the paperwork required during this phase. See to it that they are given enough time to finish up with any exit task from their previous company. If they are moving in from another city or state, you should find out if they need help getting a new place.
- Many new hires are remote or at least partially remote these days. The above list still applies, but some of the tools may need to be shipped to the employee.
- A good Pre-boarding process should help new hires to feel confident in the organization, able to get the answers they need, and positive about their upcoming role with a new organization.

35

**POMS FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 1: PRE-ONBOARDING**

- Some organizations want to begin the onboarding process after the offer is accepted but before the actual start date. In these situations, employers may want to develop strategies to link new employees to the organization. Examples include the following:
- Inviting the employee (and, perhaps, his or her family) to tour the facility (this visit may include a house-hunting trip and community tour if relocation is involved).
- Mailing or e-mailing information to the employee regarding the organization, including benefits information, the organizational chart and company literature.
- Sending a care package to the recruit. Care packages might include cookies, coffee, a coffee mug with the company logo or other logo wear.
- Matching the new employee with a buddy who connects with the new employee prior to the first day to answer basic questions (e.g., What is the dress code? What can I expect on my first day? Where do employees tend to eat?).

36

**POMS FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 1: PRE-ONBOARDING**

- **Provision employees before they arrive** - Delays during onboarding give the impression your new hire is not expected to be productive immediately - or that you can't be bothered ensuring they are set up for success. Two vibes you don't want to foster after expending so much energy getting them onboard!
- Here are some of the more common onboarding tasks:
  - Security logins & access keys
  - Desk - you'd be surprised how often this one gets forgotten!
  - Computer, tablet or phone (or BYOD registry)
  - Monitors, cables, pesky adaptors
  - Logins for hardware, password management tools, role specific software & apps
  - Profile created and logins shared for time and attendance tool
  - Specialist tools & equipment
  - Uniforms & personalized name tags
- Not sure what a new hire needs? Talk to their team leader or colleague and walk through a typical day in the life - you'll uncover items or logins you might not have thought of.

37

**POMS FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 1: PRE-ONBOARDING**

- **PHASE 1: PRE-ONBOARDING**
- **Get pre-employment tasks and paperwork out of the way as soon as possible** - Paperwork is the most boring, confusing, and frustrating part of the onboarding process. So much can be held up by a missing signature on one piece of paper or an illegible bank number.
- Here are some of the more common onboarding tasks:
  - Employment contract
  - Policies that require acknowledgement
  - Payroll forms - banking, tax and other forms
  - VISA & Work requirements
  - Police & Working with Children's checks
  - Post-offer/Pre-employment drug and alcohol testing
- The faster you get paperwork done, the faster you can focus on the engagement side of onboarding. Electronic acceptance is a simple way to speed up the time for paperwork - it removes the delays of postage, filing and manual data entry.

38

**POMS FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 1: PRE-ONBOARDING**

- **Get the team involved and aware** - Beyond HR, other employees, teams, and departments should also be involved in the onboarding process. These teams have a significant impact on a new hire's engagement.
- For example, the line manager may be an employee's key point of contact, but it is likely that they will also benefit from access to HR for company policy and payroll-related queries, and IT for access to the right equipment.
- For this reason, it's important that all internal stakeholders have proper access and transparency into the onboarding process, along with a clear outline of what their tasks are. It's certainly a big ask for already-busy HR professionals, so consider automating task requests.
- Communication from the supervisor and team leader is essential before day one. From the time the contract is signed, it's critical for new employees to begin building a rapport with their manager.

39

**POMS FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 1: PRE-ONBOARDING**

- **Keep managers and team leaders engaged in the process** - Their input is important to create an effective employee journey - yet they are often frustrated with red tape and process.
- There are two core activities you can do to keep every manager 'in the loop' and engaged with the new starters journey.
  - 'Nudge' a team leader by assigning key tasks and deadlines
  - Get team leaders to leave a 'welcome message' to the new starter.
- By including managers in the process (rather than just relying on HR), you ensure that best practices for onboarding are followed. If managers understand what employee onboarding is about, the effects it can have on engagement and the positive effect it will have on staff retention, they'll be more likely to do their part.

40

**POMS FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 1: PRE-ONBOARDING**

- **Share Information that will Impact New Starters in their First Week** - It's important to keep reinforcing your culture, brand and unique style to new starters before day one.
- **Don't overwhelm them!** Here's a list on the must have onboarding activities to help them feel ready for their first day:
  - Employee Handbook
  - Office dress code and behavior guidelines
  - Parking information and parking pass or office key
  - Staff Contact list and introductions
  - Organizational mission, vision, values
  - Organizational chart
  - Develop FAQs - ask current employees what they know now, that they wish they knew "then."
  - Business jargon, team lingo & terminology
  - Invite new hires to group chat bots & socials - to at least absorb information
  - First day schedule - include lunch with supervisor and/or team
  - First week schedule

41

**POMS FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 1: PRE-ONBOARDING**

- **PREPARING FOR THE FIRST DAY** - Ensure that everything is ready for the new employee's first day by coordinating with IT, Accounting, Facilities, etc.
- **HR forms** - A new hire's first day generally feels overwhelming, but some of the paperwork can be filled out at home to alleviate the information overload. For remote employees, submitting these forms is sometimes required prior to day one, before any equipment is shipped to them.
- **Typical forms are:**
  - Health insurance enrollment
  - Payroll system log-in and direct deposit registration
  - Tax forms, direct deposit forms
  - Time sheets - guidance on recording time
  - Retirement paperwork

42

**POMS FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 1: PRE-ONBOARDING**

- **PREPARING FOR THE FIRST DAY** - Ensure that everything is ready for the new employee's first day by coordinating with IT, Accounting, Facilities, etc.
- **Workspace** - New hires should feel welcome, expected, and prepared for. Some things you might need to prepare if the new hire is working onsite are:
  - Keys/fobs/security/identity badge
  - Business cards
  - Branded swag
  - Computer access and IT profile
  - Email account setup
  - Essential software user registration/access
  - Phone/voicemail setup
  - Any company-provided devices should be cleared of prior user data and ready for a clean setup.

43

**POMS FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 2: WELCOMING NEW HIRES - Plan for the First Day**

It is usually dedicated to making new hires feel welcome into the organization. It is also about giving them an orientation to help them acclimate. Take note that they might not know any person in your organization. So, they might not know how your teams operate.

- This is why it is important to provide them with a clear image of how the organization works before they start their first day. Also, a lot of newly hired employees are eager to start working. Hence, you should make sure that this phase does not last for more than one week.
- Their first day of work has to be simple. During the orientation process, you can help them understand your culture better. You can also show them how the practices in your organization are aligned with the culture.
- You can also talk about topics such as attendance, time off, payroll, and medical insurance policies. If necessary, you can even direct them to the cafeteria, clinic, parking area, and other facilities in your office building.
- Do not forget to introduce them to the rest of the team, as well as the stakeholders. At the end of this phase, you may organize a brief meeting with them to ensure that they are well-adjusted and comfortable within your organization.

44

## POMS FOUR PHASES OF AN ONBOARDING PROGRAM

### PHASE 2: WELCOMING NEW HIRES

- **THE FIRST DAY** - Intentionality on a new hire's first day is important. Personal and relational touches like a welcome note, a prepared name plate on the office door or desk, or some small welcome gift go a long way to making a new hire feel confident in their new role.
- Assign a team member to meet the new hire on arrival. This person should facilitate the first day of meetings, introductions, a facility tour if necessary, and getting settled in.
- This person should be available most of the day to answer questions, make an introduction, host lunch with some team members, and help the new hire negotiate meeting, technical and equipment onboarding, and building relationships.

45

## POMS FOUR PHASES OF AN ONBOARDING PROGRAM

### PHASE 2: WELCOMING NEW HIRES

- **THE FIRST WEEK** - Week one is all about conveying new processes and expectations. Find ways to build connection and fun into this week.
- One way to make intentional efforts throughout this week is having pre-written emails that go out once a day introducing the employee to an aspect of company history, culture, or fun facts.
- These can also include thought-provoking questions to help new hires consider their goals for working with you.
- These small touches make employees feel involved from the get-go, even though these emails are pre-written and scheduled.
- **Scavenger Hunt programs** - Companies that use onboarding gamification have 36% higher employee retention than those that don't.
  - <https://www.socialpoint.io/15-best-new-employee-orientation-scavenger-hunt-ideas/>

46

## POMS FOUR PHASES OF AN ONBOARDING PROGRAM

### PHASE 2: WELCOMING NEW HIRES

- **THE FIRST MONTH** - Assign a coach or mentor to be the communications touchpoint for a new hire's first month.
- This person should meet weekly with the new hire, be available to answer questions and explain organizational nuances or context, and help guide new relationships within the community and organization.
- A good coach or mentor should include casual conversations and fun activities with the team in addition to professional communications, fostering wholehearted relationships.
- As a mentor, it can be difficult to foster new relationships when you have a full plate of work to get done.
- The employee's supervisor should work with HR and the employee to identify training needs and develop a training plan.


47

## POMS FOUR PHASES OF AN ONBOARDING PROGRAM

### PHASE 2: WELCOMING NEW HIRES

- **THE 90 DAYS** - This crucial period often is an indication of the hire's potential for long-term success in their new role. A checklist for a healthy first season in a new role can help identify if an employee is set up for longer-term success.
- **Can employees speak to all seven items in the list below?**
  - **Diagnosis:** identifies and articulates the key challenges of the role
  - **Alignment:** is in line with organizational culture and values
  - **Relationships:** builds strong relationships with co-workers
  - **Communication styles:** generates an understanding work environment for his/her team, with open communication about personality and communications styles.
  - **Clarify expectations:** knows the major objectives of the role, team and organization.
  - **Team assessment:** knows team well and understands how to help them succeed as a team and individually.
  - **Early wins:** identifies opportunities to create success within this first period of time.
- HR should create opportunities for check-ins, gathering onboarding learnings and feedback on the process, the company, and the experience of entering the company.


48

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 2: WELCOMING NEW HIRES**

- **THE 180 DAYS** - The six-month mark provides a good opportunity for candid conversation with a new team member and should be scheduled well ahead of time as an expected onboarding milestone.
- The simple act of having this meeting on the calendar sets a clear expectation for the employee and their team that there is oversight and that their performance within the organization matters.
- The new hire should know, too, that their perspective as a new person in the organization matters, and the evaluation should include their feedback.
- Candid feedback and collaboration between leaders and direct reports is critical for growth and success.
- This is an important time for HR to conduct “stay interviews.”


49

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 2: WELCOMING NEW HIRES**

- **THE FIRST YEAR** - An annual review or personnel evaluation of some kind is part of many HR processes. Employees should receive a copy of the annual review form early on, possibly as part of the welcome packet, so they know what expectations are for the role.
- This is another important time for HR to conduct “stay interviews.”
- The end of the first year is when traditional onboarding transitions into retention and employee satisfaction.
- Shift from on-the-job training to continuous development. It's also a great time to have the career development and compensation conversations.
- 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.


50

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 3: JOB-SPECIFIC TRAINING**

- **This one is among the most crucial phases of the onboarding process.** In fact, it is directly correlated with the success rate of the newly hired employees. If these new hires do not have any formal training, they will not know what they need to do to thrive in your organization.
- As a result, they may have feelings of dissatisfaction, which in turn, can lead to higher rates of turnover. Then again, having a good training plan can help them feel welcome and at ease. They will feel that their development is indeed a priority.
- For the first part of the training, you should help the new hires become familiar with the learning management system of your organization. They must not be overwhelmed when they check out the application. You can also try to explore various kinds of learning methods such as blended learning, microlearning, and self-paced learning, among others.
- This way, the newly hired employees can choose the format that they feel most comfortable with. Moreover, you should store all onboarding learning materials in a safe place where employees can access and refer back to with ease.


51

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 3: JOB-SPECIFIC TRAINING**

- **Develop core competencies early** - Prepare your new hires for their roles by helping them develop some core competencies within their first 30 days. This can include anything they should master to excel in their roles, such as product knowledge and messaging, tools, soft skills, and cross-functional team relationships.
- Take time during the training and onboarding process to learn more about your new hires' interests and strengths so you can build development plans that hone their expertise.
- Make a plan for what your new hires should know now and what they can learn later on so you can get them up to speed without overwhelming them.
- Training often focuses on identifying an employee's opportunities for improvement and developing their weaker skills. But it's important to develop your team members' strengths too. Strengths-based learning can result in up to 23 percent higher employee engagement and 73 percent lower attrition.


52

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

### PHASE 3: JOB-SPECIFIC TRAINING

- In phase three, employers give new employees a clear picture of what they should expect from this job, while also outlining what they can expect from the company.
- The training phase is perhaps best done through a combination of coaching, OJT, workshops, seminars, and shadowing.
- Employers should make sure there are plenty of opportunities for employees to ask questions, no matter how simple or dumb they might seem.
- Fostering a culture of employee engagement during the early stages is also a great way to show your new hires in the first week itself that your work environment is a positive one.


53

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

### PHASE 3: JOB-SPECIFIC TRAINING

- Onboarding training covers any topics essential to starting out at your company. While similar to compliance training, onboarding training is specifically tailored around the new employee experience.
- Onboarding training should cover the essentials all new employees need to know: introductions to tools or software, communication practices, support resources, who to contact about particular issues, and so on. If a piece of knowledge or a tool is necessary for an employee's first days and weeks at your company, it's onboarding training material.
- It's important that onboarding training isn't overwhelming. Cover only what employees need to know to get started, then map out the rest of their learning experience.
- Lastly, onboarding training needs to include resources that your employees can refer to later as needed. Consider creating a company wiki or knowledge base to keep internal information handy.


54

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

### PHASE 3: JOB-SPECIFIC TRAINING

- **Technical skills development** - is a basic component of employee training because it is a primary way for you to develop the skills you need in your role.
- Employees who are already competent in their jobs can undergo further training to gain new skills and stay current with the latest technologies and processes.
- Some examples of technical skills that you can learn through this form of training include:
  - Content writing
  - Social media management
  - Data analysis
  - Coding
  - Programming


55

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

### PHASE 3: JOB-SPECIFIC TRAINING

- **Soft skills development** - Soft skills refer to personality traits that enable you to communicate and work cooperatively with co-workers and customers. These skills are useful for both new and old employees, and they play a vital role in building a respectful, collaborative and efficient culture within a company.
- Some examples of soft skills that you can learn through this form of training include:
  - Communication
  - Problem-solving
  - Teamwork
  - Leadership
  - Time management
  - Conflict resolution
  - Work ethics


56

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 3: JOB-SPECIFIC TRAINING**

- **Products and Services Training** - Products and services training may be a part of your onboarding program or a way for the employee to get reacquainted with your company's offerings. Your employer may also use this training when they introduce new campaigns.
- This type of training provides information on different aspects of a product or service, such as:
  - Industry training
  - Options available
  - Instructions for use
  - Benefits and Features
  - Care and maintenance
  - Price
  - Warranty


57

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 3: JOB-SPECIFIC TRAINING**

- **Quality Training** - Quality training commonly occurs in production-focused companies.
- This method trains you to ensure that all products meet certain quality standards, which may be imposed by the company, industry or third parties. In some cases, employees who complete a quality training program will receive certification.
- Quality training covers such topics as:
  - Compliance with quality standards
  - Quality control processes
  - Product observation techniques
  - Prevention and elimination of poor-quality products
  - Evaluation and improvement of a production system


58

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 3: JOB-SPECIFIC TRAINING**

- **Safety Training** - Safety training protects you from work-related injuries, and it is especially important for companies that use toxic chemicals or other hazardous materials. This type of training also includes fire drills, evacuation plans and workplace violence procedures.
- Safety training should be done regularly, and include refresher training covers such topics as:
  - Defensive driving
  - Protective gear
  - Safety best practices
  - First aid
  - Foodservice safety
  - Construction safety
  - Asbestos


59

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 3: JOB-SPECIFIC TRAINING**

- **Team Training** - The purpose of team training is to enable the members of a team to build stronger relationships with one another and work together cohesively. It empowers you to improve your decision-making, problem-solving and team-development processes to achieve better results for your organization.
- Some of the topics that employers discuss in team training include:
  - Improving communication
  - Creating a positive work environment
  - Improving team collaboration
  - Increasing team productivity
  - Establishing good relationships with teammates
  - Identifying and leveraging the strengths of team members
  - Keeping teammates motivated

60

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 4: EASE OF TRANSITION TO THE NEW HIRE'S NEW ROLE**

- This is the last phase of the onboarding process. It may last for up to a year for some positions.
- Its purpose is to help employees go from being new hires to being full-fledged employees. You have to encourage the managers of your organization to set a clear expectations for the new members of the team. This way, they will know what their responsibilities are.
- Keep in mind that it is crucial to have smart goals that can help them visualize what productivity, success, and quality look like. Once these employees reach one month or one quarter, you can conduct a review on their performance.
- This way, their efforts can be recognized and their performance can be improved.


61

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 4: EASE OF TRANSITION TO THE NEW HIRE'S NEW ROLE**

- **Help the new hire's transition to the new role** - Recently hired employees need to be slowly integrated into the team and office culture. In the fourth phase, the employee will transition from an individual contributor with limited responsibility to a full team member.
- The transition period is extremely important for a new hire. In phase four, it takes a while to get accustomed to the new environment and responsibilities. But even then, it is hard to adjust and find that perfect fit.
- In order to have a successful development of their competency and transition into their new roles, the new employee has to address two main challenges:
  1. Interpersonal relationships with peers
  2. Adapting their skillset for the position
- Effective managers will give new hires enough time to adjust to the work environment, familiarize themselves with all company policies and procedures, and prepare for their first project.

62

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 4: EASE OF TRANSITION TO THE NEW HIRE'S NEW ROLE**

- **Help the new hire's transition to the new role and build relationships** - It's all about preparation, support and communication - and it starts from the day the new employee accepts your offer

1. **Glad you're here** - Nothing says welcome to the company more than arriving to your new job with your office stocked and ready to go.
  - Make sure that you supply your new employees with everything they need to get started - their own personal space, supplies, necessary computer software, log in information.
  - Taking some time to get things organized prior to their arrival can make a huge difference and go a long way in making them feel a part of the team from the start.

63


 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 4: EASE OF TRANSITION TO THE NEW HIRE'S NEW ROLE**

2. **Meet and greet** - Take some time to introduce new employees, not only to the immediate team, but to people in other areas of the organization.
  - Some companies find it helpful to conduct short, 15-20 minute meetings with people from different departments. This offers a stress-free way to familiarize everyone with the new additions to the team and help educate new employees on the inner workings of the organization.
  - It also helps to open communication channels across the company and offers a great opportunity to promote a supportive company culture. The team and the new hire will both reap the benefits.

64



 **FOUR PHASES OF AN ONBOARDING PROGRAM**


**PHASE 4: EASE OF TRANSITION TO THE NEW HIRE'S NEW ROLE**

- Help the new hire's transition to the new role and build relationships -

**3. A helping hand** - Mentoring can help speed up the onboarding process by providing one-on-one support for everything from learning about company policies to who to call for computer issues. This can ease the strain on the new employees, team and manager.

- It's a great way to build trust and relationships from the get-go. Remember that newcomers are uncertain about their new roles and responsibilities and who to go to for help.
- By providing a mentor, you're adding an extra layer of support for them, helping to reduce the stress that is normal during the onboarding period.

65

 **FOUR PHASES OF AN ONBOARDING PROGRAM**


**PHASE 4: EASE OF TRANSITION TO THE NEW HIRE'S NEW ROLE**

- Help the new hire's transition to the new role and build relationships -

**4. Welcome to the community** - It is important to help your new hires get familiar with the company culture.

- Spend time going over your company's mission and values. What does your company believe in? How is the culture cultivated in the day-to-day workplace?
- What are the overreaching goals and expectations of the company and how do the employees make those a reality?
- Taking the time to explain your company culture and how everyone plays an important role in the success of the organization can go a long way in cultivating a feeling of belonging.
- This is a great way to support a positive team mentality from day one.

66

 **FOUR PHASES OF AN ONBOARDING PROGRAM**


**PHASE 4: EASE OF TRANSITION TO THE NEW HIRE'S NEW ROLE**

- Help the new hire's transition to the new role and build relationships -

**5. Too much of a good thing** - Sometimes new employees can be overzealous want to prove themselves. This can backfire and cause strife within the workplace.

- The key is to address this behavior upfront and in a respectful way. Take into consideration that the behavior could be a nervous reaction to the stress of taking on a new job.
- If new employees challenge how things are done, it might be helpful to explain that there are tried and true ways of doing things and this is the way it is done here.
- Try to put yourself in their shoes and understand that it will take some time for them to feel comfortable.
- Also, consider the affect this can have on the current team members. They could be feeling threatened by the new employees' pushy behavior. Let them know that you are addressing the problem.
- **Communication is key.**

67

 **FOUR PHASES OF AN ONBOARDING PROGRAM**

**PHASE 4: EASE OF TRANSITION TO THE NEW HIRE'S NEW ROLE**

- Help the new hire's transition to the new role and build relationships -

**6. It's the little things that count** - Are your new employees' offices located in a high-traffic area? If so, can you find a better space? Is there a special software program that could make their job easier? How about their hours? Is the company flexible on start times?

- If so, offering the employee a choice shows that you care about their work/life balance.
- The basic tenant of "treating others as you would like to be treated" is a good motto to follow when it comes to getting off to a great start with new employees.
- People like to feel valued. Being proactive and investing in your new employees will offer them the best opportunity to succeed and become a positive force within your organization.

68



**KEY ELEMENTS OF A NEW EMPLOYEE ONBOARDING PROGRAM**




69

**POMS THE 5 Cs OF AN ONBOARDING PROGRAM**

**1. Compliance** - This is often known as the paperwork part of onboarding and refers to the part where new hires are taught about policies, safety regulations, confidentiality agreements, and harassment prevention.

- Be sure that onboarding includes a thorough run-down of their policies and rules.
- To be most effective, you should implement a clear process by which employees can report discrimination and other issues.
- Earn your new employee’s trust by making it clear your company takes these issues seriously.




70

**POMS THE 5 Cs OF AN ONBOARDING PROGRAM**

**2. Clarification** - The next step includes clarifying the employee’s responsibilities, long-term goals at the company, and job expectations. This will help them know exactly what their future at the company will look like.

- Take this time to set your employee up for success. Establish a support network and ensure she has the tools she needs to complete her work.
- This may include answering employee’s questions such as:
  - *“What are my monthly as well as yearly objectives?”*
  - *“How do my individual goals fit in with my job? How will this organization help me achieve them?”*




71

**POMS THE 5 Cs OF AN ONBOARDING PROGRAM**

**3. Culture** - A strong and positive culture gives you a recruiting edge. And clear values keep individual behavior in line with your company’s ethics.

- Make culture a strong aspect of your onboarding process by inserting it throughout your new hire’s experience. Include your company’s history and mission in your onboarding process.
- This part of onboarding focuses on acculturating your new employee. For example, a company might have a very informal culture where hierarchies are not enforced, and everyone works together. In this step, you are really setting the tone for the way people work together.




72

**POMS THE 5 Cs OF AN ONBOARDING PROGRAM**

**4. Connection** - Interpersonal connections with peers and managers are essential in any organization, and this helps new hires establish them.

- A great example of this is assigning an onboarding buddy.
- You can foster connection during your onboarding process by finding creative ways for your new hires to spend time with coworkers.
- Remember to foster connections across the organization, particularly with people in other departments who will the new hire will need to work with.




73

**POMS THE 5 Cs OF AN ONBOARDING PROGRAM**

**5. Check In Regularly** - New hires are most likely to quit their positions within the first year. By checking in with these new employees throughout that first year, companies can address brewing problems.

- This includes checking back with new hires regularly, and periodically, getting feedback from them, and giving it back.
- This is the necessary data you'll collect to improve the process for all parties. Set a schedule, such as 30-60-90 days.
- Make sure that HR is involved as a more neutral party - "stay interviews"



74


**POMS BASIC CHECKLIST FOR NEW HIRE ONBOARDING**

1. Make sure that the job requisition approved by the Human Resource department.
2. Prepare the documents for the new hire, including contracts, payroll information, job description, and employment policy manual.
3. Meet with appropriate parties to plan and customize the on-boarding program, based on the job requirements.
4. Request the required equipment and devices to have them set up before the new hire's first day of work.
5. Set up the new hire's email and other work-related accounts as well as the login credentials.
6. Set up the new hire's workstation.
7. Set a new hire orientation schedule.

75

**POMS BASIC CHECKLIST FOR NEW HIRE ONBOARDING**

8. Welcome the new hire to the organization via email and other appropriate methods.
9. Tour the new hire around the office building.
10. Appoint someone to be the new hire's peer or buddy mentor.
11. Send out a new hire announcement email to the members of the team and/or share the news of the arrival of the new employee during a meeting.
12. Ask the new hire about their onboarding feedback.
13. Create a check-in plan for thirty, sixty, and ninety days.



76

### POMS METRICS FOR EVALUATING ONBOARDING

Employers should evaluate their organization's onboarding strategies using a variety of metrics that are meaningful to the organization. Some examples include:

- **Time-to-productivity.** This metric measures the time it takes for a new hire to get up to speed and contribute to the organization, and it is strongly influenced by the onboarding program. Establish key performance indicators for each position, then measure how many days it took a new hire to get there.
- **Turnover/retention rates.** Examine the turnover/retention rates for different "graduating classes" (e.g., those who began their employment in a particular year) and track the different rates of those classes.

77

### POMS METRICS FOR EVALUATING ONBOARDING

- **Retention threshold.** Track the point at which most new employees tend to exit the organization (e.g., 50 percent of employees tend to quit the organization within the first 90 days of employment).
  - If the organization tends to lose many employees during the first 90 days of employment, for example, the organization may want to conduct in-depth exit interviews to determine the cause (e.g., promises made but not kept, lack of thorough understanding of any negative working conditions).
- **New-hire surveys.** Survey new employees at various intervals during their first year of employment to learn where their pain points are. Survey your buddy/mentor appointees, as well, to learn what they believe is working and what isn't.

78

### POMS METRICS FOR EVALUATING ONBOARDING

- **Employee satisfaction and engagement.** These two metrics are closely related to onboarding because how we start in an organization creates a first impression that's hard to modify. Engagement starts with onboarding and providing a culture to support your company's "Employee Value Proposition" (EVP) results in greater employee satisfaction.
- **Performance measures.** For example, compare the performance of a group provided with only one week of onboarding experiences in the past with that of a similar group provided a full month's worth under a revised program.
- **Informal feedback.** Especially in smaller organizations, employers may want to gather small focus groups consisting of recent new hires (or conduct this research one-on-one) and ask open-ended questions to determine their satisfaction not only with the onboarding process, but with the organization as a whole.

79

### POMS ROLES AND RESPONSIBILITIES FOR NEW HIRE ONBOARDING

"Onboarding is everyone's responsibility" but without actionable items and accountability, onboarding programs will never succeed. Here are some guidelines for allocating onboarding duties and accountability:

- **HR department.** Completing and collecting employee paperwork (e.g., forms, benefits); reviewing work hours, the history and background of the organization, and the organizational chart; touring the facility.
- **Training department.** Delivering the onboarding program elements; guiding lectures and discussions about organizational culture, goals and objectives; reviewing company videos.
- **Supervisor.** Discussing duties and responsibilities, work behaviors, and standards and expectations; introducing team members and other members of the organization; touring the department; reviewing other roles and relationships within the department.
- **Co-workers.** Sharing how the group works as a team, how to get things done, how to find/requisition tools and equipment, and where to turn for support.
- **Executive team.** Helping the employee understand the organization's mission, vision, values, strategic goals and objectives; reviewing roles and responsibilities at a higher level; describing organizational culture.
- **Mentor/buddy.** Introducing team members and others within the organization, reviewing informal rules and policies, answering day-to-day questions.

80

### POMS TAILORING ONBOARDING TO DIFFERENT AUDIENCES

All employees, no matter their level or status, will need a **job-specific onboarding process**, since this is how an organization conveys culture, rules and guidelines for all employees. However, the process may be modified to meet the differing needs of various groups of employees.

- **EXECUTIVES** - Executive onboarding requires focused integration to succeed, such as supporting the new leader in aligning with stakeholders and building relationships with the rest of the team. Understanding the organizational culture is imperative, as he or she must work within it even if the goal is to change it.
- **MANAGERS** - All supervisory and management employees will need a review of not only the employee handbook and company policies and programs, but also information on how to administer or lead these various programs and policies. Ongoing training on how to answer the five questions of onboarding for their direct reports will be crucial to success. Learning how to coach employees, especially new hires, as part of their manager duties will help employers make good on their employee value proposition.

81

### POMS TAILORING ONBOARDING TO DIFFERENT AUDIENCES

- **REMOTE WORKERS** - Employees who telecommute all or part of the time will need guidance on how regular check-ins will be conducted, as well as such details as the use of company equipment for nonbusiness purposes, time monitoring, privacy at home and communications challenges. What behaviors are encouraged or expected in order to fit into the organizational and team cultures should be explained in detail.
- **DIFFERENTLY ABLED WORKERS** - Persons with disabilities also may need information about accommodation options and how to arrange them with human resources or their manager. Both employees and managers should feel comfortable with the process of asking for and providing accommodations that will support success on the job.
- **VETERANS/RETURNING SERVICEMEMBERS** - Veterans often are challenged to translate their military skills into private-sector jobs. They may benefit from additional support in determining how their skill set relates to their role and adds value to the team.

82

### POMS TAILORING ONBOARDING TO DIFFERENT AUDIENCES

- **SECOND-CHANCE/FORMERLY INCARCERATED WORKERS** - Returning to the working world can be a shock, and more time to acclimate and assistance from a supportive buddy would be beneficial. Highlighting available training and development programs would be key for this population.
- **GIG WORKERS** - Independent contractors and consultants, while not employees, may need instruction on billing, accessing the premises, basic conduct expectations and other unique issues the organization should address in an abbreviated onboarding process. Similarly, interns, temporary workers or seasonal employees may have different benefits, rules of conduct, policies and programs that the employer should explain to them.



83

### POMS ON-BOARDING DELIVERY APPROACHES

- Various components of an onboarding program can be delivered using different approaches and methodologies combined to suit the organization and new hires.
- Some employers are using innovative practices, such as **games, video, and team-building exercises**, to get new hires excited about joining the company. They're also working to make sure people can hit the ground running with functional workstations and equipment. Some examples of this include:
  - *Facebook has its "45-minute rule," which means all new employees can begin to work within 45 minutes of arriving because all of their systems and devices have been set up before they report for their first day.*
  - *Leaders at Suffolk Construction, a national construction firm based in Boston, invite entry-level hires to participate in a variety of team-building exercises, including rowing the Charles River.*
  - *New employees at Bedgear, a Farmingdale, N.Y.-based manufacturer of performance bedding, take a walking tour of downtown Manhattan to visit other retailers that sell customized products, including Warby Parker and Samsung.*

84

**POMS ON-BOARDING DELIVERY APPROACHES**

- **WEB-BASED/VIRTUAL ONBOARDING** - Whether your workplace is fully in-person, fully remote or a hybrid model, online onboarding has become mainstream.
  - Offering online orientation activities streamlines the process, supports paperless documentation, and offers a way for employees and their families to access benefits and other company information at any time.
  - Other onboarding activities can be completed around varying schedules and at a pace most helpful for individual employees, and information can easily be tailored for various audiences.
- **MAKE IT SOCIAL.** The social element makes the process memorable and also accelerates learning. Finding ways to help establish group connections very early on helps make the new hires feel welcome.
  - A buddy or mentor also becomes a resource for feedback and guidance. New hires benefit from having their own support system and the wisdom of the crowd versus one individual to help them through the onboarding experience.

85



**BEST PRACTICES FOR YOUR NEW EMPLOYEE ONBOARDING PROGRAM**

**POMS**

86

**POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING**

**Best Practice #1: Start onboarding *before* your new hire’s first day of work**

- Many organizations will mistakenly wait until the new employee’s first day of work to start orientation and onboarding.
  - In many cases, remember that there may be a delay of days, weeks, or even months from receiving a job offer to when your new hire begins their new job.
  - If you don’t start connecting with the new hire, you also risk them accepting another position - show them you care about them.
- This delay presents a great opportunity for you to use this time before day one to build excitement, help them feel welcome, and begin the steady stream of information they will need to get up to speed quickly.

87

**POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING**

**Best Practice #2: Create awesome hiring and welcome practices**

- Creating an awesome hiring experience can create an awesome and long-lasting first impression. That hiring experience, however, consists of many different elements beyond sending your new team members a coffee mug or list of company policies.
- To help your new employee hit the ground running and get them ready not just for their first day in their new job, but for their first month, put a new hire checklist in place to cover some of the following new hire practices:
  - Welcome the new hire with a call and welcome email
  - Send a new hire welcome package
  - Prepare the new hire’s work tools and resources
  - Prepare an orientation program and agenda
  - Provide opportunities to meet and greet colleagues

88

## POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING

### Best Practice #3: Involve senior leaders to instill company culture

- Onboarding is not just the responsibility of your human resources team. While HR professionals will often be involved in the creation of a new hire onboarding program, it's the responsibility of the entire organization - team members, managers, and senior leaders - to execute onboarding activities.
- Involving a senior leader like a founder, for example, gives that person the opportunity to help new employees understand the company culture, educate them on the company history, and explain company values and expected behaviors.
- There are many ways you can involve senior leaders, such as:
  - Deliver a company presentation;
  - Give a tour of the building or facility;
  - Present a specific training topic; and/or
  - Take the new team member out for coffee or lunch.

89

## POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING

### Best Practice #4: Leverage onboarding software

- An effective onboarding process consists of many, many different tasks and activities, from completing new hire paperwork to conducting new hire orientation and training programs.
- Many HRIS software providers provide automated, integrated onboarding solutions that eliminate the redundancies of data entry, reduce the use of paper-based forms, and streamline the overall process. They also ensure tasks don't get missed in those important first few days and weeks.



90

## POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING

### Best Practice #5: Create a “living trust” agreement with your employee

- A trust agreement forms the foundation for a positive working relationship, whether it's between members of a group, or a manager and their team member(s).
- Building a culture of trust from the beginning is the key to developing employee engagement.
- It should be created collaboratively, written down, and reviewed, and updated regularly as a living document.
- The recruitment and onboarding process are key moments to create belonging. To complement your existing onboarding program, work with your employee to create a trust agreement. Ask the new hire to define and share what they need to feel they belong. Share your response as well.

91

## POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING

### Best Practice #6: Regularly conduct one-on-one meetings

- The main purpose of having regular one-on-one (1:1) meetings (also called “check-ins”) with your team members is to foster positive and productive relationships between you (the manager) and the individual members of your team.
- It's important to build these 1:1's into your new employee's normal work routine, and make them a habit, as early as possible. As part of their onboarding and orientation program, consider conducting your first 1:1 meeting on their first day of work. This will set the stage for future meetings.
- This is a particularly important element in onboarding of remote workers.

92

**POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING**

**Best Practice #7: Provide opportunities to connect with co-workers**

- It can be tough to be the new kid on the block. There are many ways you can support your new employee in their efforts to connect with their new teammates and foster their feelings of belonging and inclusion, such as:
  - Schedule short introductory meetings with co-workers.
    - Ask an existing team member to act as a mentor or buddy to your new hire.
  - Host a team lunch or team-building event to create a more relaxed, informal environment for people to get to know each other.
  - Share a welcome video with the new hire, before their first day of work, introducing members of their new team.
- **EXAMPLE:** At one company I worked for, they had a practice called “Rookie Cookies”. New employees were encouraged to make (or buy) cookies, and people would come by, introduce themselves, grab a cookie, and chat. It was a great (and tasty!) way of meeting new colleagues for the first time!

93

**POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING**

**Best Practice #8: Conduct “stay interviews”**

- A stay interview is when an employer (typically HR) sits down with an employee to gather information about the things the employee values about their job and to discover what the worker believes can be improved.
- It is similar to an exit interview, but it’s done with active employees.
- The purpose of stay interviews is, ultimately, to raise employee retention rates. However, many things can be discovered during stay interviews that are important for reaching that end goal.



94

**POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING**

**Best Practice #8: Conduct “stay interviews”**

- Stay interviews allow employers to:
  - Build trust between managers and their team members.
  - Engage with employees to show their opinions are valued.
  - Learn why employees want to continue working for the company, and why they might want to leave.
  - Find out if there are any issues that should be resolved between the employee and any of their superiors or team members.
  - Understand the employee’s stance on their current position and what they’d like to have changed.
  - Determine what challenges employees appreciate and what motivates them to work toward the organization’s mission.
  - Gain a better understanding of the employee’s unique fears, dreads, hopes, and strengths.
  - Gather actionable information about current and upcoming employee trends in the office.

95

**POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING**

**Best Practice #8: Conduct “stay interviews” - continued**

- Stay interviews should be done once a new employee has begun to settle into their job, within the first couple of months.
  - Consider interviewing them a few more times throughout the first year of employment.
  - Annually to ensure any new issues, motivations, and trends are recorded and dealt with before they go too long without being addressed.
  - Anytime employees seem disengaged for a prolonged period of time.



96



**POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING**

**Best Practice #8: Conduct “stay interviews” - *continued***

- To conduct stay interviews that are effective at increasing engagement and building trusting relationships, use these six tips:
  1. Conduct all needed stay interviews within a few weeks of each other so that the most current and accurate information can be gathered.
  2. Make the employee aware of the interview ahead of time, including its purpose and how to prepare for it.
  3. Keep the interview around 25-45 minutes long.
  4. If the employee seems uneasy answering stay interview questions, work to build trust and show transparency. In the meantime, make it possible for interviews to be conducted anonymously.
  5. Don't include a performance review during the stay interview, and don't mention the employee's performance at all. Doing so may discourage the employee from being honest in their feedback.
  6. Express your gratitude for the employee and how you value their work.
  7. Have procedures in place so that effective follow-up actions can be immediately addressed.

97

**POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING**

**Best Practice #8: Conduct “stay interviews” - *continued***

- Here are some examples of “stay interview” questions to get you started:
  - What is the best part of your job?
  - Do you feel you're getting clear goals and objectives?
  - Do you feel your knowledge, skills, and experience are being fully utilized?
  - What would make your job more satisfying to you?
  - How can you be better supported?
  - Do you feel valued and recognized in the company?
  - How do you like to be recognized for a job well done?
  - What do you look forward to most when you come to work every day?
  - What do you dread about work every day?
  - Do you have enough tools and resources to do your job properly? If not, what is missing?
  - What are we currently not doing as a company that you feel we should?
  - Would you recommend our company to job-seeking friends? Why (not)?

98

**POMS BEST PRACTICES FOR EFFECTIVE ONBOARDING**


**Best Practice #9: Conduct “offboarding” to better understand why people leave**

- Offboarding consists of a number of activities, many of which focus on understanding the employee experience. This is typically done by gathering feedback through mechanisms like exit interviews and surveys.
- Often, offboarding interviews can be very effective if done a month or more after an employee has left the organization.
- One of the goals of an effective onboarding process is to maximize employee retention and loyalty. When an employee does leave it's critical to understand why, and what could have been improved in the onboarding process to prevent that from happening.

99

**POMS QUESTIONS**

- This is the chance to address issues that may not have been covered to your satisfaction; or
  - To expand a point; or
  - To clarify a point.
- If there are any further questions which we were not able to get to today, please feel free to contact the instructor(s).



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100