



The Road Map to Successful

ONBOARDING

**The Road Map
to Successful Onboarding**

CONTENTS

Introduction: Why Onboarding Matters 4

PRO TIPS

Advice from Netchex's HR Manager 7

SHRM's Four C's of Onboarding..... 8

Automating Employee Onboarding..... 11

Welcome New Employees with the Netchex Dashboard..... 13



INTRODUCTION: WHY ONBOARDING MATTERS

Honestly, onboarding should matter to you because it matters to your new hires. Companies typically spend a considerable amount of time and energy selecting a candidate for an open position. In fact, some HR professionals report spending up to 80 hours recruiting a single hire. Ensuring that your new hire feels welcomed and is ready to begin work on their first day is essential to employee retention.

The first 3 to 6 months of a new hire's tenure are crucial because during this time frame, employees are forming impressions that will impact whether they stay with a company. In fact, an employee can decide within the first 30 days whether to remain at an organization long-term.

So What is Onboarding?

The Society of Human Resources Foundation defines onboarding as the process by which new hires get adjusted to the social and performance aspects of their jobs quickly and smoothly, and learn the attitudes, knowledge, skills, and behaviors required to function effectively within an organization. An effective onboarding program will reinforce a new hire's decision to choose your company.

The basic objectives of any onboarding program include:

- **Documentation** - completing all federal, state, and local forms.
- **Provision** - providing new hires the resources they need to begin work on their first day (e.g. uniforms, laptops, email addresses, etc.)
- **Socialization** - introduce new hires to the ideals and values of your company and begin the process of team integration.
- **Compliance** - ensuring that all rules and legal regulations are followed (e.g. licenses, certifications, etc.)

A company's approach to onboarding can range from extremely structured to a sort of "sink or swim" strategy, which often leaves new employees struggling to find their way. In order to embark on the road to success, companies must consider the style of onboarding that works best for them. According to the Society for Human Resource Management (SHRM), the onboarding style can be categorized as informal or formal.

- **Informal onboarding** refers to the process by which an employee learns about his or her



INTRODUCTION: WHY ONBOARDING MATTERS

new job without an explicit organizational plan.

- **Formal onboarding** refers to a written set of coordinated policies and procedures that assist an employee in adjusting to his or her new job in terms of both tasks and socialization.

Research can attest that companies that implement a formal onboarding program are more successful at retaining valuable employees.

Onboarding should be a long-term program that builds support and acclimates new employees into your company with a structured plan. It can be approached in three phases:

Phase	Timeframe	Sample Activities
Engagement	<i>Before the First Day</i>	<ul style="list-style-type: none"> • Complete Federal, State, and locally required paperwork • Receive welcome emails from HR department and direct supervisor • Receive information about the company, department, and team members
	<i>First Day to First Week</i>	<ul style="list-style-type: none"> • Formal introduction to team members & direct supervisors • Tour facilities • Get email address and necessary equipment • Attend orientation • Attend lunch with team
Cultivation	<i>First Week to First 30 days</i>	<ul style="list-style-type: none"> • Begin job shadowing • Work with a mentor to learn about the corporate culture and customers • Meet with cross-functional departments to understand their needs and expectations
Progression	<i>Beyond the First 30 days</i>	<ul style="list-style-type: none"> • Implement one-on-one performance updates with supervisor • Develop a training calendar • Identify continuing learning opportunities

ONBOARDING BLVD

Research on new employee onboarding shows that when onboarding

is done correctly, it leads to:

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





PRO TIPS: ADVICE FROM TIFFANY BELL, NETCHEX HR MANAGER

Onboarding your employees is the first step in retaining loyal, hardworking employees. If you show them from the start that they are valued and appreciated, even as a new hire, this will go far in helping to retain a reliable employee base. Here are a few ways you can ensure you maximize your onboarding process and help retain loyal, dependable employees:

1. **Pre-board your new hires!** As the Human Resource Manager at Netchex, I make sure our new employees feel welcome the minute they sign their offer letter. I personally welcome every new hire with an e-mail, letting them know that we are thrilled to have them on our team. Pre-boarding also allows you to get to know your new employee, helping them with any questions they may encounter prior to their first day (what exactly can they wear to work, are there certain break times, or the many multitude of benefit questions that may arise. These all need a personable, approachable employee there to help them every step of the way.)
2. **Reduce first day jitters.** First day jitters are sure to come for every new hire. Remember your first day in a new place with a sea of new faces? You can help your new employees reduce nerves on their first day by appointing a seasoned employee to help show them the ropes. Ideally, this would be someone they will be working with directly, maybe someone in their department or their direct supervisor. This person would be there to help introduce the new hire around to the other employees and help show them what your company culture is about.
3. **Get out of the office.** Take your new hire out to lunch on that first day (or first week, if time doesn't allow.) Whether it be their supervisor or some co-workers, this gives the new employee a chance to interact with co-workers outside of the office setting, adding an extra layer of confidence.
4. **Have their work space ready.** It may seem simple, but having your new hire's desk ready for their first day will help them off to a successful start. Having a computer that's ready for them to log into, having their phone set up with their extension, even providing them with their business cards on that first day will make them feel valued.

Onboarding doesn't stop after that first week for a new hire. It's important to remain in contact, especially during those first crucial 90 days, when the new hire is learning the ins and outs of their new role. Send them a quick e-mail and ask them how everything is going. Ask them if there is anything you can specifically help them with, or if they have any concerns that may need addressed. They may need an advocate for something - be that advocate, from the day they sign their offer letter until the day they hopefully retire from your company!



PRO TIPS: SHRM'S FOUR C'S OF ONBOARDING

SHRM outlined the building blocks for successful onboarding, known as the *Four C's*:

- **Compliance** is the lowest level and includes teaching employees basic legal and policy-related rules and regulations.
- **Clarification** refers to ensuring that employees understand their new jobs and all related expectations.
- **Culture** is a broad category that includes providing employees with a sense of organizational norms — both formal and informal.
- **Connection** refers to the vital interpersonal relationships and information networks that new employees must establish.

Compliance



The first step on the road to any successful onboarding journey begins with compliance. This phase includes completing all legal, federal, and state required paperwork for your new hire to legally become your employee. This would include:

- Form I-9
- Form W-4, Employee's Withholding Allowance Certificate
- Any state required forms
- Employee handbook
- Code of Conduct policy

Clarification



The next phase of successful onboarding begins to build on that foundation and establishes an employee's role within their team, their part in the company's overall big picture, and the responsibilities they are expected to meet. Defining an employee's roles and responsibilities is crucial to maintaining a positive working environment since most team disagreements stem from a lack of clearly defined roles. In his book, *Building Productive Teams*, Glenn H. Varney explains, "During any discussion of roles and responsibilities, team members need to clearly know their specific tasks and the areas for which they will be held accountable. Everyone in the team should also know what everyone else is responsible for. This will build strength and mutual support."



PRO TIPS: SHRM'S FOUR C'S OF ONBOARDING

Culture



The prior two steps laid the base and framework of the onboarding process. Moving to introduce your new hires to your corporate culture takes your onboarding process to the next level. Many of today's leading companies begin immersing new hires into their company on or before their first day with welcome gifts based on the new hire's likes and interests expressed during the interview process, or from a user profile. In addition to welcome gifts, some of the nation's top companies also turn to mentors for new hires. Mentors help give new hires a real view of your company by sharing their story and experiences with the company, introducing new hires to key stakeholders, and being a point person for any questions.

Connection



New employees should be encouraged to establish interpersonal relationships and information networks within the company. Joining groups within the organization such as Toastmasters® or leading social initiatives like United Way® giving campaigns can encourage new employees to reach out to coworkers outside of their immediate group. New employees should be encouraged to establish other interest groups based on common interests such as sports or entertainment.

WELCOME AVE

69%

of new employees who take part in a well-structured onboarding program were more likely to remain at a company for at least three years.

Losing an employee due to their experiences of being confused, feeling alienated, or lacking confidence is a sign of a poor onboarding program.





AUTOMATING EMPLOYEE ONBOARDING

In order to effectively manage a structured onboarding like one outlined in the Four C's, companies should consider automating their onboarding process with integrated Human Capital Management (HCM) solutions. Automation allows HR managers to reduce the time needed to begin onboarding a new hire and save money by going paperless.

When onboarding is automated through a HCM, new hires only have to enter pertinent information like their name, address and social security number once. The data is automatically populated for payroll, benefits, and direct deposit information. This reduces the time spent doing this on the first day, and in some cases, allows the new hire to already have necessary items such as badges, computer access and more available upon arrival.

When recently discussing the benefit of using such a solution, Kerry Ranson, Chief Development Officer of HP Hotels, said “the seamless component of moving a candidate from hire through the onboarding process and then over to payroll is worth its weight in gold.[Using an automated solution] makes the employees feel comfortable with us as a new employer, both because they know what to do and because it conveys we are professional and well organized,” states Ranson.

There are numerous additional benefits to automating your employee onboarding. Top benefits include:

1. **Time and cost savings** - Automating the onboarding process allows companies to save both time and money by reducing the number of hours HR departments have to devote to onboarding a new hire.
2. **File storage** - Employers are typically required to keep new hire paperwork a minimum of two years. For a growing company, this can mean mountains of paperwork. An automated onboarding solution allows employers to securely store employee information in an online location.
3. **Data analytics** - With growing government compliance issues like the EEOC's pay data reporting, having insight into onboarding analytics is valuable to today's HR teams.

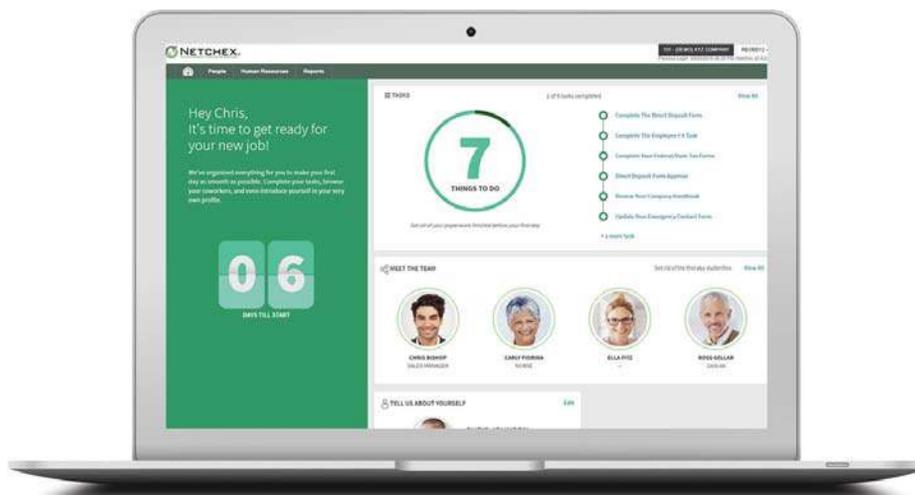


AUTOMATING EMPLOYEE ONBOARDING

Using Automation to Meet the Four C's

Today's payroll and HR solutions can help employers meet the Four C's. An ideal onboarding technology will encompass all of these elements in one easy to use solution.

- **Compliance:** New hires should have access to an easy, user-friendly system that can capture forms like I-9, Federal and State tax forms, and other state specific forms with electronic signatures.
- **Clarification:** HR administrators should have an easily accessible Human Resources knowledge base for help with any regulatory or compliance-related questions.
- **Culture:** Companies can introduce new hires to their corporate culture and team members through a complete technological solution.
- **Connection:** A complete onboarding solution can create opportunities for networking through interest profiles which include links to social platforms such as Facebook® or Twitter.



HAPPY EMPLOYEE LANE

Organizations with a standard onboarding process experience **54 %**
greater new hire productivity and **50%** greater new hire retention.





WELCOME NEW EMPLOYEES WITH THE NETCHEX DASHBOARD

Now you can minimize the risk of an unsuccessful new hire and start your employees on the road to success from day one. Welcome your new employees in a more personal, motivating way with the Netchex Onboarding Dashboard. Give new employees a countdown clock to their start date, information about their new team members, their own personal profile to fill out, and access to their tasks assigned by HR - all before their first day of work.

Break the Ice

New hires can break through the introduction barriers and learn more about their new team members during their onboarding process. Team members can now introduce themselves to your new hires with their own personalized profile complete with their picture, a quick bio about themselves, and a listing of their hobbies and interests. They can also include links to their social media pages. Your new hires can introduce themselves to the team by creating their own profile.

Take Employees from Compliance to Connection

Capture required new hire forms like I-9s, Federal and State tax forms, and other state-specific forms with electronic signatures. You can set due dates on tasks that need to be completed on the employee's first day, and employees will receive automatic email alerts when tasks are assigned and/or overdue. Admins and managers will receive alerts when tasks are completed and ready for approval. Admins and managers can also receive an email alert that will provide a summary of which employees have completed tasks and which employees still have overdue tasks. You can even create custom tasks and upload your own custom documents like employee handbooks or policy agreements. Finally, conduct orientation or training virtually by embedding video or survey links.

Start New Hires on the Road to Success

Give your new hires the head start they need to love their time with your company. The Onboarding Dashboard makes new employees feel welcome, decreases their learning curve, and integrates them into company culture more quickly.

How We Can Help

Netchex offers employers more than a payroll software. We are a team of payroll, tax, and HR professionals that become an extension of your staff by providing the service and support today's businesses need.

Our Onboarding Dashboard enhances the entire Netchex suite, making tasks easier to access, showing new employees their progress as they complete tasks, and subtly reminding them how much time they have to complete the remaining tasks. Give us a call to see how we can help your team today.



Let's talk. Call (877) 729-2661 or visit us online at www.netchexonline.com

