

5

simple steps  
for



WINNING  
at  
ONBOARDING

CheckPointHR™ 

When new employees join your organization, you've got one chance to forge a strong first impression and position them for success. The first 90 days are critical in determining whether a new employee will stay with your organization.\* That means the content and delivery of your onboarding process can mean the difference between a failed hire and a long-term contributing employee.

Onboarding presents a complex challenge because it requires busy HR departments to quickly address multiple goals and tasks. They must simultaneously handle compliance issues (like securing signatures on required documents), administrative tasks (such as communicating company policies and obtaining information necessary for payroll and administration), and management objectives (like clearly communicating roles and expectations, sharing the company culture, and introducing colleagues). Plus, they must accomplish all of this while channeling employees' initial enthusiasm from being selected for the position into the deep-rooted conviction they've joined a high-quality organization where they can make a meaningful impact.

How can an HR department successfully manage the multiple goals and tasks inherent in the onboarding process? Breaking the process down into five key components can help define a simple, executable onboarding strategy.



“Support, Undermining, and Newcomer Socialization: Fitting in During the First 90 Days,”  
Kammeyer-Mueller, Wanberg,  
Rubenstein and Song, July 2012  
(<http://amj.aom.org/content/56/4/1104>)

# 1. Structure

Since onboarding serves a critical role, it deserves the time and attention of your leadership team. While HR should lead the process, each stakeholder should contribute to the program design. Each department manager, for example, should communicate the information they wish to share with all new employees as well as the information they want each new employee in their own department to receive during onboarding. Each department leader should also contribute their skill set to the process, where appropriate. For example, the IT department should lend its expertise to any onboarding technology decisions and the legal department should review the compliance process and documentation.

## Key steps for developing an onboarding structure

- Start the process by agreeing on program's goals.
- Create a list of all the tasks required to achieve the identified objectives.
- Assign individuals or groups responsible for completing each task.
- Decide the order of completion for each task and what tools and documents will be necessary to support the process.
- Document each step so that the process will be consistent each time an employee joins the organization.

A well-structured onboarding program shows your new employees that you value them and the contribution they will make to your business.

**When employees go through structured onboarding, they are 58% more likely to stay with the organization after three years.**

*-2007 study by the Wynhurst Group*



## 2. Streamline

Technology can help engage employees and make the onboarding process much easier for your HR department. Ideas for improving onboarding with technology include:

### Offer an onboarding portal

Create a self-service portal where newly-hired employees can complete administrative tasks, discover your corporate culture, view training videos and obtain other information that will help acclimate them to your organization.

### Bring documents online

Take advantage of electronic signature and verification tools so employees can handle their required documentation online. This improves data accuracy, since information is entered and reviewed directly by the employee rather than the same information being repeatedly entered by various individuals in your organization. It also saves time, enabling HR staff to focus on more valuable face-to-face interactions with the new employee.

### Track onboarding tasks

Keep new employees focused with task management tools that track new-hire status and progress. Select a tool that can be configured to align with your onboarding workflow and accommodate the documents required to complete each task.

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# 3. Customize

While consistency is paramount, allowing for flexibility can also be important in your onboarding process. It stands to reason that the process and requirements for a plant manager in one region of the country might differ from those of a financial analyst in another.

Your company might consider customizing its onboarding program based on levels of access to sensitive information, physical risks associated with a position, special accommodations required, and many other role- or location-specific issues.

It is important to note these differences when developing your onboarding structure. You should also select technology that can be configured to address these differences and the customized processes they require.

Customized requirements may be based on:

- Geographic location
- Department or division
- Organizational role
- Role-based risks or physical requirements
- Special accommodations needed
- Access to proprietary or sensitive information
- Assessment results



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# 4. Engage

While technology can greatly simplify and organize the onboarding process, it can't replace person-to-person engagement with the new employee. In fact, taking the HR staff out of the paper-pushing process frees time for you to welcome new employees, introduce them to their co-workers and offer personalized guidance on the issues that are important to them. While some people feel ready to get right to work after receiving their network login, others need more guidance and direction. Offering hands-on assistance is important during the first few days and weeks of an employee's tenure.

Spending time with new employees allows you to reinforce the expectations for the employee in the new position and timelines for achieving objectives or performance levels. It also offers the opportunity to do a reality check on your onboarding process, making sure you've communicated job requirements, expectations and other aspects of your company's culture.

Time spent welcoming a new employee often pays for itself by reducing "rookie" errors, improving performance and boosting employee retention rates.

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# 5. Measure

Once you've taken the time to develop a working structure, you're well on your way to a successful onboarding program. For long term success, however, you need to continually measure results and make any necessary changes to ensure your program remains thorough, accurate and relevant as your organization evolves.

By measuring your onboarding process against the objectives you set during the planning process, you can ensure it continues to meet key performance indicators that support your business goals. Make sure to schedule regular assessments to evaluate progress, discuss lessons learned and enact action items. During this process, it is important to gather feedback from all participants, including the new employees, their managers and the leadership team.



## Benefits of program measurement

- Encourages accountability from all stakeholders in the process.
- Provides a benchmark so you can address shortfalls to the program and document improvement.
- Offers actionable data for future forecasting and planning.

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# Bring out the BEST in your people

CheckPoint HR delivers an all-in-one solution that streamlines every part of the employee experience, from recruiting to retirement. With a team of experienced consultants, credentialed HR pros, and rock-star developers, we make your HR and employee benefit program work harder for your business.

## Technology

With your own custom onboarding platform, benefit enrollment portal, ACA toolkit and private exchange, you'll minimize administrative burdens while providing additional benefit options and empowering employees to manage their own benefits. Integrated payroll and human capital management technology make your processes effortless and eliminate compliance concerns. You attract, inspire, and retain top talent. Work gets easier and productivity skyrockets.

## Strategy

As a CheckPoint HR client, you'll have access to some of the top minds in HR and benefits. To achieve sustainable employee benefit savings across multiple plan years, you'll enjoy robust strategic planning, plan-remarketing, compliance support, and employee communications. You'll also receive guidance and support across the full spectrum of HR disciplines.



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