

# Managing the Employee Onboarding and Assimilation Process

## Overview

Employee onboarding, also known as new-employee orientation or assimilation, is the process by which an organization assimilates its new employees. It is one of the means for improving productivity, building loyalty and engagement, and helping employees become successful early in their careers with the new organization. This discussion includes the potential benefits and risks associated with onboarding, the types of information that should be covered, the duration of the process, allocation of roles and responsibilities, and special types of onboarding.

## Business Case

Onboarding of new employees is something that is always done, but often not done well. Too often, onboarding consists of handing a new employee a pile of forms and having a supervisor or HR professional walk the employee around the premises, making introductions on an ad hoc basis. Onboarding is often confused with orientation. While orientation may be necessary for completing paperwork and other routine tasks, onboarding is a comprehensive process involving management and other employees that can last up to 12 months.

A Gallup study showed a correlation between engaged employees and a company's profitability, turnover rate, safety record, absenteeism, product quality and customer ratings. An effective onboarding plan offers an ideal opportunity to boost employee engagement, such as fostering a supportive relationship between a new hire and management, reinforcing the company's commitment to helping employees' professional growth or proving that management recognizes the employees' talent.

When onboarding is done well, it lays a foundation for long-term success for the employee and the employer. Organizations have learned that onboarding is not merely a process for getting new employees to sign off on their new-hire paperwork. Rather, the process manifests value for the organization in various ways. See [Ramping Up Onboarding](#).

## HR's Role

HR professionals are heavily involved in the hiring process, their role extending beyond merely getting an employee on the payroll with all the forms signed. HR professionals should transition the new hire seamlessly from applicant to effective employee. The first

priority of an HR professional in this regard may be to persuade upper management of the strategic importance of proper onboarding.

Onboarding is mainly about communication between the employer and the employee, with the flow of communication being mostly from employer to employee—policies, procedures, manuals, forms, who runs what, etc. In order for an organization to be ship-shape, the organization needs to do a good job of onboarding. See [New Employee Onboarding Guide](#).

HR professionals should recognize that new employees present potential threats to existing employees (e.g., "Is this the person who is going to replace me?" "Why is the company moving in that direction?"). Similarly, new employees face many challenges from a new corporate culture and existing employees when coming on board. One of the human aspects of being an HR professional is managing such issues.

## **Background**

It is impossible not to onboard a new employee. The real issue is the quality of the onboarding. Simple steps such as having the new employee's desk and computer login ready to go on his or her first day and ensuring the employee's supervisor has time to spend with him or her during the first week are essential to starting the employee off on the right foot. See [Onboarding Mistakes to Avoid and Some Creative Ideas to Adopt](#).

## **Definition**

Onboarding includes the processes that allow new employees to learn about the organization, its structure, and its vision, mission and values, as well as to complete an initial new-hire orientation process. For some organizations, the onboarding process consists of one or two days of activities; for other organizations, this process may involve a series of activities spanning one or many months.

## ***Engagement, loyalty and commitment***

Studies have continued to demonstrate that employee engagement is partially determined by the new employee's treatment and orientation during the first 30 to 90 days of employment. A solid onboarding strategy will help build on that loyalty and help with retention and engagement issues throughout an employee's tenure. See [Onboarding Key to Retaining, Engaging Talent](#).

## ***Mission, vision and values***

If employees are to contribute to the organization, then they must have a solid understanding of the organization's mission, vision and values and how these align with the employees' positions and departments.

### ***Expectations and performance standards***

"What is expected of me?" is one of the most important questions contributing to employee satisfaction, reports the Gallup Q12 study.<sup>1</sup> Having a review of work standards and expectations, as well as an understanding of how performance will be managed, measured and reviewed, will be critical.

### ***Work processes and how to get things done***

Every organization operates in different ways. How do I get a sign-off on a new work order? Who needs to approve this new project? How do I get cross-functional teams to work together? These are some of the questions new employees often ask; the employer must address them via an overview of work processes, work flows, departmental structures and informal "rules of the road."

### ***Acceptable work behaviors and etiquette***

What is the work culture, and what standards of etiquette govern employees' everyday behavior? Is it OK to smoke in front of the building? Can employees eat at their desks? Are laughing and talking in the hallways seen as positive or negative behaviors? Is it okay to decorate a workspace with photos and knick-knacks?

### ***Review and sign-off on documents***

New employees also must sign numerous documents, which may include benefits forms (accepting or declining coverage, choosing benefits options, assigning a beneficiary), legal paperwork (noncompetition agreements) and acceptance of the terms of the employee handbook and company policies.

### ***Risks***

While most elements of onboarding are by nature positive, or at worst neutral, organizations should beware of a potentially damaging "orientation" practice that still may exist in some workplaces: co-worker hazing. Often seen in predominantly male-oriented workplaces, hazing may involve a "test" to be passed before a new employee is accepted as part of the "club." Hazing may involve innocuous behaviors, such as hiding tools and equipment, practical jokes, or excessive ribbing or teasing. But it may escalate to serious behaviors, including bullying and harassment.

Employers should be aware of these behaviors because they may drive the hard-won recruit away from the employer at a vulnerable time in the employee's tenure, or even prompt the filing of a discrimination or harassment charge.

### ***Checklist of Items to Cover***

The scope of information covered in the onboarding process varies from organization to organization, but these are some of the basics:

- Company profile
  - Mission, vision and values of the organization.
  - Organizational culture.
  - Organizational chart.
  - Directory.
  - Tour of facility.
- Legal and policy review/orientation
  - Form I-9.
  - Personal information sheet.
  - Tax withholding.
  - Benefits enrollment.
  - Policies (e.g., anti-harassment, nondiscrimination, e-mail, dress code, telephone) and/or employee handbook.
  - Employment at will.
  - Noncompetition agreement.
  - Security information.
- Work group
  - Meeting with supervisor.
  - Meeting with co-workers.
  - Work expectations and standards.
  - Tools and supplies (e.g., business cards, e-mail account, keys).
  - "How we do things" (informal issues for ensuring success).
  - Cross-departmental communications issues.
  - Etiquette issues (e.g., eating at your desk, answering phones, personal items at work).

## **Duration**

Many organizations believe that onboarding is a one-day event in which the new employee signs all appropriate paperwork, reviews all pertinent information, receives the facility tour and is set to begin. Increasingly, however, organizations realize the value of a thorough process as a strategy to ensure success, improve productivity and engagement, and, ultimately, enhance retention. To that end, organizations are looking for ways to strengthen onboarding by making it a process and not an event.

## ***Before the start date***

Organizations that tend to recruit long in advance of the employee's start day (for example, college recruiting that occurs months before the employee's anticipated start date) may find that they want to begin the onboarding process after the offer is accepted but before the actual start date. In these situations, organizations may want to develop strategies to link new employees to the organization. Examples include:

- Inviting the employee (and family) to tour the facility (may also include a house-hunting trip and community tour, if relocation is involved).
- Mailing information to the employee regarding the organization, including benefits information, organizational chart and company literature.
- Sending a "care package" to the recruit (especially in the case of college students who may value a package of goodies during final exams). Care packages may include cookies, coffee, a coffee mug with the company logo or other logo wear.
- Sending flowers to the employee at his or her former place of employment welcoming the employee to the new organization (which may also entice the employee's co-workers to consider employment with the organization).
- Matching the new employee with a mentor 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? What time should I arrive?).

### ***First day***

The first day will include delivering all the basic information, including a tour of the facility, introductions to key staff and review of all new-employee paperwork. Because new employees will retain only a certain percentage of new information, it's important not to inundate them with too much and to reinforce information throughout the onboarding process.

### ***First week***

During the first week of employment, the organization should provide more detailed information for the new employee and reinforce key points delivered previously. The human resource professional, the supervisor, the mentor or some combination of them should check in to determine how the new employee is adjusting and whether the organization is delivering on promises made. This also should serve as an early opportunity for the employee to air any concerns.

### ***First month***

During the first month of employment, the person or team responsible for onboarding should continue to reinforce key issues and introduce the new employee to additional staff, including key members of the leadership team, and check in to determine whether the employee's questions and concerns are being addressed.

### ***First year***

The onboarding process should continue by providing a touchback to the new employee to ensure that all necessary information has been shared and that the organization is addressing the employee's questions and concerns.

## **Roles and Responsibilities**

While every organization is unique in how the onboarding responsibilities are shared throughout the organization, here are some general guidelines for splitting up onboarding duties:

- **HR department.** Employee paperwork (e.g., forms, benefits), work hours, history and background of the organization, review of the organizational chart, tour of the facility.
- **Training department.** Delivery of the onboarding program elements; lectures and discussions about organizational culture, goals and objectives; review of company videos.
- **Supervisor.** Duties and responsibilities; work behaviors, standards and expectations; introductions to fellow team members and other members of the organization; tour of the department; review of other roles and relationships within the department.
- **Co-workers.** How the group works as a team, how to get things done, how to find/requisition tools and equipment.
- **Executive team.** Mission, vision and values; strategic goals and objectives of the organization; high-level review of roles and responsibilities; description of organizational culture.
- **Mentor/buddy.** Introductions to fellow team members and others within the organization, review of informal rules and policies, answers to day-to-day questions.

See [New Hire: Orientation Checklist #2 \(HR\)](#) and [New Hire: Orientation Checklist #3 \(Supervisor\)](#).

### **Tailoring Onboarding to Different Audiences**

All employees, no matter their level or status, will need some sort of onboarding process since this is the way in which an organization conveys rules and guidelines for all employees. However, the process may be modified to meet the differing needs of various groups of employees. For example, 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.

Employees who telecommute all or part of the time will need guidance on how their performance will be measured, as well as such details as the use of company equipment for nonbusiness purposes, time monitoring, privacy at home and communications challenges.

Contract employees and consultants may have differing policies controlling their reporting of work hours, access to the premises and other unique issues the organization should address in an 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.

Persons with disabilities also may need information about accommodation options and how to arrange them with human resources or with their manager.

### **Onboarding Delivery Approaches**

Various components of an onboarding program can be delivered using different approaches and methodologies combined to suit the organization and available resources.

#### ***Web-based onboarding***

Advances in technology permit many organizations to offer some components of their onboarding process electronically:

- Benefits enrollment.
- Security procedures (e.g., parking passes, security passes, passwords).
- Review of company profile or history.
- Review of policies and procedures.
- Online tours and videos.

Not only does offering online onboarding streamline the process, but it also ensures that employees complete all the administrative components of onboarding. In addition, web-based onboarding supports paperless documentation of these transactions and offers a way for employees and their families to access the information. Some experts believe that providing electronic onboarding strategies can even contribute to employee retention.

See:

- [Virtual Onboarding: A Closer Look](#)
- [Welcome Onboard](#)
- [Tips for Creating an Effective Onboarding Site](#)

#### ***Mentoring and buddy systems***

Many organizations offer a formal or informal mentoring or buddy system to support the new employee during the onboarding period. Mentors/buddies may be volunteers or selected by the department manager or HR professional. In some cases, departmental team leaders may serve in this capacity.

Generally, the role of the mentor or buddy is to offer the new employee a connection to someone who is not in a position of direct authority over the new hire (a supervisor) or

in an official capacity (the HR professional) as a guide. The mentor may be responsible for such mundane tasks as directions to the restrooms or cafeteria or instructions on parking guidelines, or he or she may be involved in helping the employee understand the nuances of working in an organization (such as, what are the "hot buttons" for those in executive leadership? Or how do we get projects approved?).

Mentors/buddies may be teamed with the new employee for a day, a week, a month or even a year, depending on the length of the formal onboarding program and on the personal relationship that develops, especially in more informal arrangements.

## **Metrics**

HR professionals should evaluate their organization's onboarding strategies using a variety of metrics.

- **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.
- **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).
- **Performance measures.** For example, compare the performance of a group provided with only one week of onboarding experiences with that of a similar group provided a full month's worth.
- **Informal feedback.** Especially in smaller organizations, HR professionals 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. Questions might include:
  - How would you rate the onboarding process?
  - What did we forget to include that would have been helpful to you as you began your new job?
  - How would you rate HR's performance in the onboarding process? How would you rate your supervisor's performance? Your co-workers? Top management? Your mentor/buddy?
  - Did we provide misinformation during the hiring process or in the onboarding process? What could have been made clearer?
  - What do you need now to be effective in your job?