

eBook

New hire onboarding guide

How to build a
long-term program

greenhouse





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Part 1

Setting your new hires up for success

Want to make your new hires successful? Think big. Don't just focus on their first day or week – plan activities that will support, encourage, and reward them on a regular basis, especially during those critical first few months on the job.

There are several dimensions of workplace success: culture fit, learning and growth opportunities, the challenges and rewards of the work itself, workplace relationships, accountability and the ability to make an impact. But many of these things are hard to measure and monitor, so it's easy to lose track of how well you're keeping up.

Good news – you don't have to do it all by yourself! Greenhouse has put together this guide to building a comprehensive onboarding program.

5–10 departments are involved in onboarding at the majority of companies*

Why invest in onboarding?

66% of companies with onboarding programs claimed a higher rate of successful assimilation into company culture**

62% had higher time-to-productivity ratios**

54% reported higher employee engagement**

*hreonline.com/pdfs/10022007Extra_AberdeenReport.pdf

**servicenow.com/lpwhp/state-of-work-survey.html



Part 2

The pre-boarding primer

An increasing number of companies are realizing that onboarding shouldn't start on an employee's first day. In fact, once you have a signed offer letter in hand, you can (and should!) begin the pre-boarding process.

Here are a few of the tasks that you can incorporate into your pre-boarding program:

Have new hires fill out paperwork like your NDA, inventions agreement and tax forms

Provide new hires with a detailed schedule of their first day, including directions to the office, names of the people they'll be meeting with and what they should plan to do for lunch

Share a copy of your employee handbook and a guide to benefits

Allow new hires to request their preferred desk/computer/equipment setup

Give new hires access to your company intranet or onboarding software like Greenhouse Onboarding so they can familiarize themselves with their coworkers





Here's SendGrid's prescription for pre-boarding success:

Provide access to an FAQ page that includes things like how to explain what SendGrid does, getting to the office, what to expect with orientation and who to contact with additional questions

Request information to complete the background check

Provide all legal and tax-related paperwork

Send new hires a link to the employee handbook for their review

Remind new hires to bring acceptable forms of ID for day one

Let new hires request their preferred computer setup in advance

“Pre-boarding is **the new black.**”

Emily Staebell

People Ops Generalist at SendGrid

Emily and the rest of the people ops team at SendGrid have created a comprehensive pre-boarding program. This relieves (some) first-day jitters for new employees and frees up time for everyone.



Part 3

Onboarding vs. orientation

One of the biggest problems with onboarding is that it can mean different things to different people. So let's get this out of the way right now – what do we mean when we use the term “onboarding”?

Hallie Pierson, Director of Human Resources, Talent Operations & Rewards at Constant Contact put it this way:

“Most HR teams confuse orientation with onboarding and as a result the employee is left to figure things out on their own once the required paperwork is complete. Most companies will have an orientation, but those who onboard differentiate themselves.”

In other words, orientation is all about the nuts and bolts of getting someone ready for their job – like filling out paperwork and taking a tour of the office – while onboarding is a lengthier, more comprehensive process that involves helping a new hire understand their role and their place in the organization.

As much as 20% of employee turnover happens in the first 45 days*

*The Wynhurst Group SHRM presentation 2007



This chart breaks down some common activities for new employees and whether they should be considered part of orientation or onboarding:

Orientation	Onboarding
Signing legal paperwork (contract, NDA)	Defining employee's role and responsibilities
Setting up computer and email address	Setting goals
Obtaining security badge	Explaining company's values and how policies embody them
Organizing office tour	Requesting feedback

23% of employees leave within six months because they haven't received clear guidelines about their responsibilities*

*shrm.org/hrdisciplines/staffingmanagement/articles/pages/onboarding-key-retaining-engaging-talent.aspx

Part 4

Onboarding: Not just for HR

To create a comprehensive onboarding program, you'll need to divide and conquer. Some tasks are better handled by HR and others should fall to the new employee's direct manager.

Hallie Pierson, Director of Human Resources, Talent Operations & Rewards at Constant Contact, suggests that a direct manager should be responsible for the following onboarding tasks:

33%

of new hires want management to be responsible for onboarding them*

*forbes.com/sites/georgebradt/2014/03/19/want-your-newemployees-personal-commitment-take-theironboarding-personally/#29d8e1163a5d

Being present and available the first 30 days of your new hire's employment

Communicating a clear understanding of corporate objectives, success metrics and the new hire's role within the organization

Ensuring your new hire understands the company lingo, norms and culture

Building quick relationships through listening and feedback

Coaching and mentoring on an individualized level from day one on ways your new hire can develop their career

Utilizing technology and tools to meet the daily tasks associated with starting a new role



Other companies find it useful to assign a buddy to each new hire to facilitate socializing and address questions that new hires may be reluctant to bring up with their manager. In many cases, this buddy is from another department, which has the added benefit of fostering cross-company communication.

Here are a few additional tips for setting up a buddy system:

Make your buddy system a volunteer initiative for current employees where people opt in if they want to get involved

Decide on a minimum length of time employees should have worked at your company before they're eligible to become buddies

Try to pair new hires with buddies from other departments to provide a well-rounded view of your company and give them insight into how different departments work

Put the buddy in charge of social tasks – like introducing the new hire to the rest of the team, taking them to lunch and serving as a resource for any of their questions – and ask them to take new hires on a tour of the office or neighborhood

The multiple layers of onboarding

Onboarding not only involves multiple people, but also multiple layers within an organization.

Dr. John Sullivan outlines the five organizational layers of onboarding in this way:

Corporate level

Covering sign-ups and corporate-wide values

Location level

Covering information and issues related to the country/region and the plant/facility where the new hire will be working

Departmental level

Covering the department the new hire is joining

Team/job level

Covering the person's work team and job

Individual level

Covering things at the team level that relate to the unique and diverse needs of this individual



Onboarding remote employees

Whether you're onboarding employees at a satellite office or opening a new branch from afar, it's important to offer a warm welcome, even if you can't do it in person. Here are eight tips and tools to help make sure that "out of sight" does not lead to "out of mind."



1. Paperwork

Services like DocuSign and HelloSign are lifesavers for remotely signing paperwork, and are legitimately and legally binding

NOTE: In the state of California, it is required to physically verify the original documents to complete I-9s – luckily there's a plethora of on-demand services, and don't be afraid to authorize and deploy a notary

2. Equipment

Having new hires receive equipment like laptops and phones a little early is okay, but don't ever let it show up late

Keep an eye on weekend and holiday non-delivery days and take advantage of premium shipping services with guaranteed transit and delivery times

FedEx is great for reliability – they can pick up same-day requests and guarantee transit and delivery times, inclusive of date and even time.

3. Swag

Put together a nice care package that includes what you'd regularly give a new hire, and maybe some extra love to show that even if they aren't in the office, they are very much a part of the team

See previous section about shipping and getting it to the new hire on time

4. Involvement and face time with the team

Since remote employees aren't in the office day after day, they are missing the crucial aspect of a team's culture – being there! – so it's important to capitalize on opportunities for them to face their teammates

Over-communicating should be your goal – given the nature of remote situations, anything less could quickly and easily lead to a sense of isolation

5. Team meetings/all-hands

Set the expectation that they are to attend these meetings just as any other employee would

Be sure to have a video conference platform set up for them to easily access and be a part of every meeting, like Whereby, which is super easy to set up, browser and mobile-friendly, and you can create and own your personalized URL for free (Free branding? Score!)

6. One-on-ones

If you regularly hold these for your in-office employees, there's no reason it should be different for your remote employees

There's no distance a phone call or video chat can't cover!

7. Outings and get-togethers

It may not always be realistic, but you should try to invite remote employees out with the team as much as possible

Extend invitations to company-sponsored team events or maybe just to casual gatherings when they're available

8. Out of sight, still top of mind

Make a conscious effort to show remote employees they are still considered an employee and part of the team even if they are out of the office

Reach out to them personally if there is anything going on directly related to them or relevant to their role, even if it's just to ask their opinion or give them a heads up that X, Y and Z will be happening

Make it clear that your virtual door is always open and you welcome contact from them at any time

Our advice

Challenge yourself to get as creative as possible with ways to include your remote employees. People Ops Manager Cecilia Landholt says,

“When people feel like their opinion matters in the small stuff, they end up feeling invested in the company.”

Cecilia recommends getting remote workers to suggest and vote on the names for conference rooms, participate in costume contests and submit photos of themselves to be displayed in a family tree at the HQ office.

Part 6

Recommended activities: Week 1

33%

of managers rely on email, in-person meetings and delegating to experts to complete 93% of onboarding tasks – and only 7% of their tasks are automated*

*servicenow.com/lpwhp/state-of-work-survey.html

Week 1 is going to be a whirlwind for your new hire (and probably for you, too!). They'll be adjusting to a new work environment, learning everyone's names and roles in the company and, of course, trying to understand what their job is all about. Don't just focus on the one-way transfer of information from employer to employee – try to plan a variety of activities that will help create a sense of belonging and foster workplace relationships.

The following page has some recommendations for activities to create a well-rounded first week for new hires. We've also made some suggestions about which person or team should be responsible, but you may need to make adjustments depending on your company's size and resources.



Activity	Examples	Participants	Organizer	Purpose
Orientation	Employee handbook overview, computer setup	HR staff, new hire	HR staff	Set up employee with appropriate equipment and information to perform their job
Social activities	First-day lunch, happy hour	Team, direct manager, new hire, all company employees (when appropriate)	Office manager, HR staff or company buddy (depending on company and department size)	Encourage team-building, make new hire feel welcome
Job responsibilities and expectations	Discussion about the role and why the company made this hire	Direct manager, new hire, CEO or executive management	Direct manager	Provide employee with a solid foundation and understanding of their role
Company history and overview	Presentation on company's timeline, discussion about industry	Direct manager, new hire, CEO or executive management	Direct manager	Provide employee with a solid foundation and understanding of company and industry
Meet the CEO/ executive management	Short meeting or social outing with CEO/executives	New hire, CEO, other executives	HR staff	Make new hire feel welcome, keep executives in the loop about new hires, promote communication
Workplace buddy socializing	Lunch, coffee, walk around the neighborhood	New hire, new hire's assigned buddy	Workplace buddy	Promote workplace friendship and inter-departmental communication
Company policy overview	Introduce rules and regulations, share points of contact for various concerns	New hire, HR or direct manager	HR staff or direct manager	Familiarize new hire with policies and procedures, facilitate problem-solving
Equipment and software setup	Set up email address, software licenses and accounts	New hire, IT staff	IT staff	Provide all materials employee needs to do their job
Getting the lay of the land	Set up physical workspace, provide building access	New hire, facilities	Facilities	Allow employee physical space to perform their job
Payment logistics	Set up payroll and direct deposit	New hire, accounting or HR staff	Accounting or HR staff	Ensure employee is paid in a timely fashion



Part 7

Checklists for week 1

Onboarding takes more than a single day. Here are a few tasks to implement during a new hire's first week.

Human resources

- Oversee new hire orientation
- Organize social activities
- Facilitate meetings with CEO and executive leaders
- Assign a workplace buddy
- Go over workplace policies

Direct manager

- Go over job duties and expectations
- Present company history and industry overview – or organize the meeting where the CEO can do this
- Begin regular check-in meetings with new hire

Workplace buddy

- Take new hire to lunch
- Go on a walk around the neighborhood
- Invite new hire for a quick social outing (coffee run, snack break, etc.)



Creating an employee development plan

When you have a new hire starting, the temptation can be to get them working as soon as possible. But this strategy can be a little shortsighted. Taking the time to create an employee development plan can help your employees visualize their future at your company and demonstrate that you're committed to their long-term success.

Your employee development plan can be as simple as a list of goals that demand increasing levels of responsibility. For example:

Month 1 goal

Research industry and present to manager

Month 2 goal

Develop competence in specific software

Month 3 goal

Participate in a project with members from at least two departments

Or, if you prefer, you can be a little more elaborate and design a plan that incorporates different types of goals. Some things to consider are goals related to the new hire's job, a particular project they'll be working on, professional development and performance.

21% of employees leaving in the first six months said “more effective training” would have convinced them to stay*

*shrm.org/hrdisciplines/staffingmanagement/articles/pages/onboarding-key-retainingengaging-talent.aspx

Here's what an employee development plan might look like for a Sales Development Representative:

Goal	Months 1–3	Months 3–6
Job-related	Return all client phone calls within 30 minutes	Create at least 100 new leads in Salesforce every week
Project-related	Research competitors and add to SDR training manual	Write a drip campaign for at least three types of prospects
Professional development-related	Learn how to create a report in Salesforce	Deliver a presentation to the entire office
Performance	Arrive at work at least 10 minutes before daily standup meeting	Implement one process to make work more efficient for entire SDR team

Remember that employee development plans should be as personalized as possible. You can provide the framework and guidance, but allow your new hire to lead the conversation and create a plan that they are excited to follow.



Part 9

Recommended activities: Months 1–6

Onboarding doesn't end after the first month on the job. Sure, employees don't necessarily feel "new" anymore (especially if you're the type of company that's bringing in new hires every week), but they still have plenty to learn.

After the first few weeks, your activities for new hires can shift away from teaching them the basics of their job and begin to focus on refining and improving their skills. You can also start assigning tasks with increasing levels of responsibility to create a sense of accomplishment and accountability. Here are a few suggestions for the types of activities to plan during this stage of onboarding.



Activity	Frequency	Organizer	Purpose
One-on-one or team meetings	Weekly/biweekly/monthly (as appropriate)	Direct manager	Provide a forum for support
Recognition	Daily/weekly/monthly/quarterly (as appropriate)	Direct manager or HR	Promote employee engagement and satisfaction
New hire leadership training (leading a meeting, teaching a lunch and learn session, etc.)	Quarterly (or as appropriate)	Direct manager	Encourage new hire confidence and professional development
Social activities	Recurring	HR, assigned buddy	Ensure new hire is welcomed and included in company culture
Feedback collection	Recurring at key points like end of orientation, first month, third month, sixth month	HR	Give new hires voice and agency in company direction
Team/partner projects (both within and across departments)	As appropriate	Direct manager	Encourage mentorship, cross-departmental communication



Checklists for months 1–6

You've got a good thing going – don't give up now! Here are a few ways to keep new hires engaged during their first few months.

Human resources

- Ensure employee knows about forums for giving and receiving recognition
- Solicit feedback at key points in onboarding such as the end of months 1, 3 and 6
- Plan regular company-wide social activities

Direct manager

- Set up recurring one-on-one meetings
- Ensure employee knows about forums for getting and receiving recognition
- Set up regular check-ins for employee development plan, leadership training and cross-departmental projects

Workplace buddy

- Plan regular check-ins and social events
- Introduce new hire to people in other departments



Other ideas for onboarding tasks

You can get as creative as you'd like when you assign tasks to new hires. Here are just a few of the ways cutting-edge employers are making onboarding interactive and fun:



Ask new hires to think of ways their team and manager could improve the onboarding experience and present their suggestions to the team

Offer a lending library of books that have influenced the company's founders

Hold a Q&A with a class of new hires and a co-founder to address all questions about the company's history, vision and direction

Decorate the new hire's desk with balloons, a welcome sign, their favorite breakfast food or all three

Throw a "100th day" party for all employees who have been at the company for 100 days or fewer

Request some fun info from new hires such as their favorite drink, food they'd like to eat on their birthday, dream vacation spot or whether they believe in ghosts or aliens

Don't forget feedback

A comprehensive onboarding program shouldn't center on a one-way stream of information. It's also important to give new hires the chance to share their feedback about the company in general and the onboarding process specifically.

The CEO of Constant Contact knows that “Feedback is a gift.” New hires there are surveyed three or more times during their first 90 days. Constant Contact also collects feedback through one-on-ones with HR business partners and managers.

After discovering that the majority of employee attrition was taking place during the first 90 to 180 days on the job, Designer Blinds introduced an “entrance interview.” And they made sure to conduct the sessions before a new hire's 90-day mark so they could catch any major issues early on. Since instituting this program, its turnover rate went from 200% to 8%.

If you're planning to hold one-on-one feedback-gathering sessions, here are a few ideas for questions. You can type in the answers and save this file, or print out a copy and write in your notes by hand. Either way, be sure to save this section for your reference!



How is everything going so far? What have been some highlights of your experience? What are some challenges you've faced?

Do you have enough, too little or too much time to accomplish your work?

How does your experience so far compare to how the company and job were presented to you during the application and interview process?

What feedback can you share about your onboarding experience?

Is there anything that's still unclear about our company or your role?



Do you have everything you need to accomplish your work?

What would help you do your job better?

Was there anything that came up during your feedback session that wasn't covered by the previous questions?



If you're looking to gather data from a quantitative survey, here's a format that you can use.

Do you disagree, somewhat disagree, feel neutral, somewhat agree or agree with the following statements:

Statement	Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Agree
The orientation experience provided me with a clear outline of my job description and responsibilities.	<input type="radio"/>				
I have a clear understanding of the company's mission and vision.	<input type="radio"/>				
I know who the points of contact are for different issues like benefits, payroll, and expense reimbursement.	<input type="radio"/>				
I was introduced to managers from every department.	<input type="radio"/>				
I feel well prepared to succeed in my job after attending orientation.	<input type="radio"/>				

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