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WHITE PAPER

Smart Onboarding Handbook

Just because a candidate has accepted a position with your company doesn't mean you are done recruiting them. Set employees up for long-term success with a strong onboarding program.



> SMART Onboarding Handbook

In Ropella's SMART Team Building/RPO eBook, we asked when readers believed the recruiting process started. (You'll have to read that book to get the answer.) Today, I have another question for you: When does the recruiting process end? Most people will say with the acceptance of an offer.

At Ropella, we disagree. Just because a candidate has accepted a position with your company doesn't mean you are done recruiting them.

Most employers have a probationary period for new employees, during which their progress is closely monitored (and during which the employer reserves the right to terminate at will). What they too often forget, though, is that the employer is going through its own probationary period as the new employee assesses how the position fits with their short-term needs and long-term goals (and during which approximately 30% of new hires will resign).

What elements does your company's current onboarding program employ?



No More **Offer Letters**

The first step in creating a great onboarding package is to do away with the old-fashioned “offer letter”.

You shouldn't be worried about negotiation at this point – work out details with the selected candidate in a face-to-face or phone pre-offer negotiation to ensure you will get a “Yes” before presenting the final written offer.

Once you know exactly what offer will be the best win-win for all parties – and have gotten buy-in from both the candidate and decision-makers at the organization – then it's time to create your Welcome Kit.

In truth, a Welcome Kit is similar to an offer letter; the difference is in the tone and presentation. The letter in your Welcome Kit should outline not just the basic compensation details, but also how excited you are to have the candidate joining your organization, additional information the new hire will need before starting (about the organization, position, location, etc.), and contact information in case they have any questions ahead of their start date. We all know that people like to feel appreciated; a Welcome Kit is a great way to show it. Contrast the following offer letter and Welcome Kit letter and ask yourself which you would rather receive.

EXAMPLE OFFER LETTER #1

Dear Bill Smith,

This is an offer of employment for the position of Vice President of Marketing at AlphaOmega. This offer is contingent upon satisfactory completion of reference and background checks. Please review this summary of terms and conditions for your anticipated employment with us.

If you accept this offer, your start date will be January 1, and you will report to John Doe, Chief Commercial Officer.

Compensation: The Company will pay you a starting salary at the rate of \$175,000 per year, payable in accordance with the Company's standard payroll schedule. In addition, you will be eligible to be considered for an incentive bonus for each fiscal year. Your target bonus will be equal to 15% of your annual base salary.

Benefits: You will be eligible for 15 days of paid vacation leave per year. You will be eligible for private health and dental insurance.

We request your response by December 15.

Sincerely,

John Doe,

Chief Commercial Officer,

AlphaOmega

EXAMPLE OFFER LETTER #2

Dear Bill Smith,

Allow me to be the first to WELCOME you to the AlphaOmega family! We can't wait to celebrate with you on your first day as Vice President of Marketing, January 1. Until then, there are a few pieces of housekeeping to finalize your employment with us.

The first is your signed acceptance of this offer, which we request by December 15. Nothing here should be a surprise, as we've talked about it previously; this is just about formalizing everything we've discussed. Your starting salary will be \$175,000 per year, with a target bonus equal to 15% of your annual base salary. You will receive 15 paid vacation days per year, and you are eligible to enroll in our private health and dental insurance plans.

We know that current employers don't always react ideally when top talent puts in notice. Just let us know if BetaGamma decides not to retain you for your two full weeks' notice; as long as you've returned the signed offer, we will be happy to have you onboard immediately.

Second, in order to make sure your first day goes as smoothly as possible, you can go to [website] to electronically complete your required HR paperwork, including tax forms and the direct deposit form, and receive a copy of the employee handbook.

Additionally, as a token of our appreciation, we have included some welcome gifts we thought you would enjoy. (You'll also receive some AlphaOmega-branded office supplies as another welcome gift on your first day.)

Finally, one of our policies at AlphaOmega is to assign all new employees a peer mentor. The purpose of this program is to provide you with someone you can go to with any questions. In your interview, you seemed to really connect with Mike Williams, Vice President of Sales, so we have assigned him to be your peer mentor. Feel free to call or text him any time at (555) 555-5555 or email him at [email]. He also wanted us to let you know he's excited about having another St. Louis Cardinals fan in the office! (Yes, that Fredbird bobblehead is from him.)

Again, we look forward to you joining us for your first day on January 1. If you need anything before then, feel free to reach out to Mike or me.

Welcome to the family!

John Doe,
Chief Commercial Officer



EXERCISE

In what ways do the two letters differ? Which is more likely to have a strong positive effect on the new hire? Is there anything you saw that you would like to incorporate into your own practices?

Here are the aspects that we believe set the second letter above the first.

Tone

Conversational

Writing the Welcome Letter in a conversational tone makes it much more inviting. It lets candidates know that you are relating to them personally, rather than treating them as just another cog in the machine.

Personal

To further this connection, find somewhere to include at least one statement personalized to the candidate. In the case above, the letter mentions that Bill is a St. Louis Cardinals' fan. It doesn't have to be an interest in order to be effective; you could mention a recent project or accomplishment that the candidate mentioned during the interview or a talent that you are excited about them bringing to your team. Anything to let the candidate know that this isn't just a basic form letter with their name put in – that you wrote it especially for them.

Optimistic

Right from the start, a good Welcome Letter lets the candidate know how excited the organization is to have them

join the ranks. That excitement will bleed over and make the candidate even more excited about embarking on this new step in their career.

Contingency Plan

When anyone puts in their two weeks' notice with their current employer, there is the very real possibility that the reaction will be the employer having that employee pack up his things with a witness to look over his shoulder and escort him to the door within the hour. In case this happens to your new hire, you should have a plan in place to bring them on board as soon as possible. After all, the sooner you have them on board, the sooner you'll know you've made it through the tricky period when counter offers, competing offers and contingencies can derail a hire.

Also keep in mind that starting quickly may be a cash flow necessity for the candidate. In some cases, this approach creates a couple of weeks of "vacation" between ending the previous job and starting the new one. Many people are cash-strapped month-to-month, or week-to-week, so should your new employee get escorted to the door, be prepared to bring him onto your payroll immediately. Your prepared approach will further reinforce for the candidate that he made the right choice.

Paperwork

Allow the candidate to take care of paperwork ahead of time, rather than wasting part of the first day on the job. On their first day, the candidate is going to be excited about learning the ropes and beginning to make an impact; by letting them fill out paperwork ahead of time, it helps them get down to business as soon as possible.

As an added bonus, handling this electronically typically takes significantly less time than filling out hard copies.

Capital One takes it a step further in their “Jump Start” program. They provide new hires with an online portal containing basic orientation information before they begin their job. According to Ted Forbes, “Capital One designed a series of e-learning modules that new hires can access on a website... this site provides information on culture, values and business lines, and it includes PDF versions of essential forms to download in advance of the on-site onboarding class.” Technology-aided preparation such as this allows for direct knowledge sharing between manager and candidate to happen as soon as the candidate arrives on the job. The new hire feels much more prepared and familiar with the organization’s policies on day one.

Gift Box / Basket

A gift box or basket is another good way to show the candidate how much you appreciate them joining your team. There are all sorts of gift basket services online that can make this easy for you to facilitate. Or you may choose to take a more personalized approach by sending a welcome basket with all sorts of goodies from local vendors and coupons and gift cards for local shops and restaurants, to help the new hire and his or her family get settled into their new home, assuming relocation is necessary. And, of course, you should include any branded hats, shirts, or other advertising specialties with your organization’s logo on them.

Peer Mentor Assignment

Assigning a peer mentor lets the new hire know from the start that there is a friendly face he or she can turn to if needed. A mentor needs to be somebody the new hire can relate to: similar age, similar career interests, similar past company or location or politics or religion... It’s all about building trust and relationships!

Contact Information

Including contact information – and encouraging the candidate to follow up, if necessary – helps keep the lines of communication open. When faced with radio silence, candidates may feel you are no longer interested, forget the positive things they saw in your company, and/or change their minds about leaving their current employer. Remember, the best transitions happen when there is frequent, open and honest communication with the candidate. By staying in touch during this two-to-four-week period, you begin to cement the relationship. And if questions or concerns pop up, you’re more likely to find them out and be able to help the candidate work through them.



Start the First Day **Right**

EXERCISE

Make a list of everything someone needs to perform in your open position. Develop a plan to ensure all of this is ready before they walk in the door.

Be Prepared

One way to show new hires that you value them is by making sure everything is ready to go before they walk in the door. This includes desks, phones, computers, and even office supplies. Little is more disheartening than being told “Well, I guess we’ll have to find a place for you to sit,” except maybe “It’ll be a few days before IT gets your computer system up and running, so just read through these manuals and procedures until then.”

Celebrate

Retirement parties are popular, especially for employees with long tenures. Retirement is certainly a reason to celebrate, but shouldn’t an employee’s first day be at least as memorable – if not more so – than their last day?

No matter how confident they are in their abilities, everyone is going to be nervous and excited on their first day at a new job. It is up to the employer to make them as comfortable as possible as fast as possible. One great way to do this – and to help the new employee get acquainted with their new coworkers – is by throwing an onboarding party at the start of the day.

Casual Drop-Ins

Perhaps one of the hardest parts of being a new employee is remembering everyone's names and figuring out where they fit in the pre-existing social hierarchy. Instead of walking a new hire around the office and rattling off the name and title of everyone you pass, schedule everyone to stop by the new hires work area for a "casual drop-in". It doesn't have to be all in one day, either; it's best to have employees sign up for timeslots interspersed throughout the day or week, rather than right on top of each other.

These are great for three reasons:

- Meeting people one-on-one is much easier than being given a series of names rapid fire.
- By encouraging employees to stay and chat for a few minutes, the new employee will immediately start to forge new connections and friendships.
- It reinforces to the new hire that everyone on the team is excited about them working there and wants to help ease the transition.

One way to upgrade these casual drop-ins is to have gathered information about the new hire that could be used to initiate conversation. You may include an interest questionnaire with the Welcome Kit, or post a bulletin board outside their office or in a common area where the new hire can write personal information such as nickname, hobbies, hometown, alma mater, pet's name(s), significant others, favorite book, etc.

You may also wish to keep these meetings so casual that the new hire does not (initially) know they were planned ahead of time. As they grow with their company and begin to welcome new employees themselves, they will, of course, figure out that it was scheduled. In the moment, though, it will feel as though everyone is excited about introducing themselves, getting to know them, and welcoming them to the team.





Give Them the **Tools For Success**

Although everyone will be excited for the new hire to begin contributing, it is important to ensure they have all the tools for success before you set them free.

Training

Training is an essential part of the onboarding process, and organizations neglect it at their own peril. If new employees don't understand the full scope of their responsibilities, or the tools and processes available to them, or simply that you are sufficiently committed to them to invest in their professional development, then they are much more likely to look for someone who will provide them with those things. Training is an especially big deal for millennials; one of the major reasons they continue to look for new jobs is a desire to continue growing and embrace new learning opportunities.

The secret to effective training all lies in the balance. You want to make sure that new employees know everything they need to know without overwhelming them. You don't want to present material so slowly that they grow bored, nor so quickly that they couldn't possibly retain it all. Here is a list of topics you will need to at least consider incorporating (in order of scope):

Company information

- Corporate culture
- A brief overview of the company's history, values, mission and goals
- Benefits review
- Policies and procedures

An outline of the reporting hierarchy, especially as it relates to the newly filled position

- If applicable, highlight potential future promotion opportunities
- Outline how different roles within and between departments collaborate to pursue shared objectives

- Responsibilities and accountabilities specific to the position
- Specific objectives and development milestones for the first month, three months, six months, and year
- Performance evaluation process
- Previous examples of success
- Be open and candid about the pressures associated with your organization, team, customers, etc., and warn of any roadblocks or challenges they are likely to face
- Remember: Vague goals produce vague results

Tools and established processes in place to aid the employee in meeting their responsibilities

EXERCISE

Ask some recent hires how they felt about the training they were provided. What does your organization do really well? Are there places you could improve?

Informal Feedback

Too many organizations today take a sink-or-swim approach to employee productivity after training is completed. But why? Even professional sports teams have an entire staff of coaches on hand – coaches who can help boost a player who finds himself in a slump, review what mistakes they made in a given game, and make note of any spectacular plays.

Your new employees want a coach on their side. It is not enough to put a new hire through training – no matter how extensive – and then just leave them to flounder their way through until their 90-day review. The need for frequent and timely feedback is especially crucial in those first days and months on the job so the employee can make course corrections where necessary and feel confident that the work they are doing is high quality. When it comes time for the review – not just a 90-day review, but all annual reviews – no one in the room should be surprised by the results. By providing this early, ongoing feedback, you can ensure new hires stay focused on the right priorities and prevent bad habits from developing.

Ideally, this appraisal process should encourage two-way dialog. I like to tell all my new hires “You can learn from us, but we can learn a lot from you, too. This is a main reason we hired you, so... help us. Tell us how we can improve. Show us new ways of doing things. Show us our strengths and weaknesses; help us fix them so we can improve together!”

Once upon a time, “no news is good news” was standard business practice; if your boss didn’t complain about the quality of your output, then you could be confident you were performing well. This is rapidly changing, however, especially among Millennials and Gen Z.



30- and 90-Day Employee Meetings

Even though you will be working closely with them in the interim, it is a good idea to set formal meetings for a new employee's thirty and ninety day anniversaries. It sets the stage for early and ongoing communication, helps build a good employee-leader relationship, creates an opportunity to give feedback that will increase the new hires success and enhance retention, and provide the employee with the opportunity to provide you with valuable feedback to improve the workplace.

Below, you will find some suggested questions to ask in these meetings, as well as the objectives you should be looking to accomplish. Do not accept vague answers such as "Fine" as an answer to these questions – dig deeper and ask for specific examples. Doing this demonstrates your accessibility, responsiveness, and that you value the new hires contributions.

The 30-Day Questions to Discuss with the New Employee

- How do we compare with what we said, during the interview and onboarding processes?
- What is working well?
- Are there any individuals who have been helpful to you?
- Based on your prior work, what ideas for improvement do you have?
- Is there any reason you feel this might not be the right position or workplace for you?

Objectives at 30 Days

- Establish an early relationship.
- Obtain information / feedback that can be applied before ninety days.
- Identify individuals you can recognize, manage up, or convert into future mentors.
- Learn if the new employee needs help or support in order to succeed.

The 90-Day Questions to Discuss with the New Employee

- How do we compare with what we said?
- What is working well?
- Have there been any individuals who have been helpful to you?
- Based on your prior work, what ideas for improvement do you have?

- Is there any reason you feel this might not be the right position or workplace for you?
- Do you know of anyone who would be a good fit for our organization?
- As your supervisor, how can I help you succeed?

Objectives at 90 Days

- Provide feedback on the answers and suggestions from the 30-day meeting. For example: "John, we really appreciate your suggestion to include a campus map with the information package we send to candidates before their face-to-face interview. We implemented your idea and we have already noticed a significant decrease in candidates who arrive late and/or hurried. Thank you for being part of our team and making a suggestion for improvement."
- Identify recognition and managing up opportunities.
- Harvest additional ideas and process improvements.
- Continue to build employee-leader relationship.
- Learn if the employee needs help or support in the role.
- Identify other candidates who may be a good fit for the organization.
- Demonstrate commitment and support for the new employee.

Strong onboarding processes – from the offer to the 90-day performance review – can have a significant impact on employee satisfaction and retention.

Need help? Ropella offers onboarding consultation, planning and implementation as part of our Recruitment Process Outsourcing programs. Contact us today to learn how we can help you Grow Your Great Company!



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