

LEADING  EDGE

ONBOARDING BEST PRACTICES

A Guide for Onboarding New Staff

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“Great vision without great people is irrelevant.”

Jim Collins
Author,
Good to Great

Why Onboarding Matters

The onboarding process your new hires go through can determine how long they will stay with your organization. **Companies lose on average 23% of new hires before the one-year anniversary and 33% of employees fail to meet company expectations in terms of productivity.** But there is also some good news: A thoughtful approach to onboarding new employees can dramatically improve these statistics for your organization.

Effective onboarding can help your organization reduce costs associated with staff turnover and ensure that new employees are set up for success. **According to a 2010 Society for Human Resource Management study, “employees in a well-structured onboarding program are 69 percent more likely to remain at the company after three years.”** The effects of onboarding last for years, so it is worthwhile to spend time considering the best approach for your organization.

Onboarding does not happen in one day. It is part of a longer process that typically lasts a year. Most employees report feeling truly part of the organization after a full year has passed. Successful and effective onboarding is beneficial to the organization in two ways:

- 1. Saves money** – Hiring, training, and functioning at less than 100 percent adds up. Having new employees leave after a few months wastes valuable company resources. Organizations save money when onboarding is efficient and successful.
- 2. Maximizes productivity** – Hiring new employees, training them, and waiting for them to figure things out is inefficient. It is in the organization's best interest to have an onboarding process that minimizes time spent learning the ropes.

Onboarding is the responsibility of the entire organization, not just HR or the manager/supervisor!

The entire organization is impacted when new employees arrive, so many people need to be involved in onboarding efforts.

Onboarding and orientation are NOT the same. Orientation might occur on the first day or during the first week, to introduce new hires to policies and procedures. Onboarding is a process that socializes new employees to the organization and ensures they have the necessary skills and knowledge to become effective members of the organization.

Benefits of Effective Onboarding

1. Engages employees early on.
2. Builds trust and alignment.
3. Encourages open communication from the start.
4. Builds your employment brand as a great place to work.
5. Fosters connection and relationships between employees.
6. Enables new employees to be productive faster.
7. Decreases turnover and increases employee satisfaction.

"I was nervous about starting at such a big organization, but they knew how to make a person feel welcome. When I got to my desk on the first day, there was a bright flag on it that said, 'Say hi! It's my first week here.' And people did!"

~ Middle Manager, Social Service Agency

How to Use This Guide

This guide provides some best practices and templates for effective onboarding. The purpose is to provide onboarding information and tools that you can tweak and modify to meet the needs of your organization.

This guide focuses on three stages of onboarding: before the first day, the first day, and the first week and beyond. Regardless of the new employee's role or size of your organization, effective onboarding will pay off in both the short and long terms.

As you begin planning your onboarding process or revitalizing your onboarding practice, consider the following questions:

- What structure will work well for our organization?
- How long should our onboarding process last?
- What is our hiring cycle? Are there times when we onboard multiple people at the same time?
- What is most important for new hires to know about our organizational culture?

Remember that onboarding is a great way to boost your employer profile.

Friends and family members of new hires will ask them: “How was your first day?” or “How’s the new job going?”

What do you want the answers to be?

“People want to know they matter and they want to be treated as people. That’s the new talent contract.”

Pamela Stroko
VP, HCM Transformation & Thought Leadership,
Oracle Corporation

Before Day One

Although the first impression of your organization happens long before a candidate interviews for a job, your brand as an employer is established at the interview and during the hiring process. It is further solidified by new employees’ experiences leading up to their first day. The most important aspect of preparing for the first day is to communicate with and engage your new employees, and to prepare your organization for their arrival. You want your new employees to be excited and confident in their decision to join your organization and to feel set up for success. It is equally important that your current employees feel prepared and eager to welcome their new colleagues.

Every hiring process has its own timeline. No matter how long you have from the time of the offer to the first day, communicate with your new hires! This section gives you some best practices to help you prepare for the arrival of your new employees.

You can alleviate the anxiety of starting a new job by making sure new employees have the information they need to feel ready for their new job. That said, new hires aren't officially on the clock until their first day and are likely finishing work at their former jobs or enjoying some downtime as they prepare for their new roles.

The goal of communicating ahead of time is to make new employees feel prepared and excited, while not requiring anything of them or setting a precedent that you will expect them to work above and beyond the requirements of the role.

This section provides suggested topics and ways to communicate before the first day. Pick the ones that work best for you, while making sure not to overwhelm your new employees.

Please note: You can combine some or all of the suggestions offered in this section into one or two messages to streamline the communication process and make it more manageable for you and your new employees.

What to communicate before the first day

See sample communication emails at the end of this section.

1

Communicate the game plan.

Within a few days of accepting your official offer, new hires should know what to expect in the time leading up to their first day. Send an email about what will happen from now until they start. You can give them a detailed overview of the entire process or keep it short. Just be sure to provide a contact person to answer any questions that may arise.

2

Provide the paperwork.

If possible, consider sending some or all of the necessary paperwork electronically (if they can electronically sign it) or physically (if they must physically sign it). The goal is to make paperwork as seamless as possible. If there is any paperwork that you know is complicated, save it for the first week.

3

Get them excited.

Before day one, new employees should receive a phone call or a quick email to let them know how excited everyone is for their first day. Consider having a board member or someone with whom they will be working reach out to them. A two-minute phone call or short email will go a long way in making them feel like part of the team.

4

Provide arrival logistics.

Make sure new employees have all the necessary information for their arrival.

When to arrive?

Where to go? How to get there? Parking? How to access the building?

Who to ask for? Who to call if anything comes up?

What to wear? What to bring? (e.g., identification, physical paperwork, etc.)

5

Share the plan.

At least a few days before day one, share information about what new employees can expect on their first day.

You should include:

Schedule for the day. If possible, send them a schedule of their first few days.

Lunch plans. Who, what, and where.

Bios of people they will be meeting. Because the first few days can be full of new names and faces, this will help them feel prepared and in the know.

“Taking the tour on my first day was not what I was expecting. Everyone knew my name and something about me. It was like meeting old friends instead of strangers. Talk about hospitality!”

~ Coordinator-level staff member, Community Center

Sample emails

Before sending an email, consider your timeline and the process you want your employees to go through. Remember that this sets a precedent for you as an employer.

Please merge and/or change these sample emails to fit your needs.

Sample hiring process email

Dear [New Employee's Name],

We're so excited that you will be joining our team at [Organization Name]. We know you will be an excellent addition to the [Department Name] and we're looking forward to your official start on [Date].

Over the next [Time Frame], we will be in touch with some information and paperwork to make your first day as smooth as possible.

If you have any questions/concerns in the meantime, don't hesitate to reach out! I'm looking forward to seeing you soon.

[Name of Sender]

Sample paperwork email

Consider what are the absolutely necessary documents, so you do not overwhelm your new employees.

Dear [New Employee's Name],

As promised, this email includes [some/all] of the paperwork we will need from you as you start work. It may look like a lot, but I'm here to guide you through the process. If you are not able to complete it before your first day, we'll make sure to save time for you to get through it all during your first week.

Attached to this email please find:

1. I-9 form – This will require valid forms of ID.
2. W-4 form – Let me know if you have questions.
3. Personal data form – Can be completed electronically.
4. Code of conduct certification – We will sign this on day one.
5. Personnel manual – We will go over and sign this together.
6. Direct deposit form – Please provide a blank check with VOID written across the front.
7. Signed offer letter – For your records.
8. [Add any other paperwork your organization requires – (e.g., nondisclosure agreement, photo release, etc.)]

Again, please don't worry about getting this all read and signed before your first day. We wanted to give you the opportunity to familiarize yourself with it and ask any questions you may have.

Please note that we will need the **following documents** from you on your first day:

1. Valid identification documents outlined in the I-9 form; and
2. [List any other documentation (e.g., driver's license, college diploma, etc.)]

If you have any additional questions/concerns, don't hesitate to reach out! I'm looking forward to seeing you soon.

[Name of Sender]

Sample arrival logistics email

Dear [New Employee's Name],

We're looking forward to your official start on [Date] and hope you are too!

We are writing to provide you with a few details to help prepare for your first day. We sent an introduction email to all our staff, and everyone is eager to meet you.

I am attaching your schedule for the first [day/week]. I will have a physical copy for you when you arrive and have also added all of the meetings to your work calendar. You will be having lunch with [Names] at [Time] and they are very excited! Their bios are attached to this email, and they have already seen yours.

Please plan to arrive at [Time] on [Date] at [Address]. Our building can be accessed via the main entrance on [Street] and is very easy to find. Once you enter the building, please [Insert details of what should happen next, who they should ask for, etc.]. If you have any trouble, please be in touch with [Name] at [Phone Number].

People typically wear [Dress Code], and I am happy to speak with you further about our dress code policy.

If you have any additional questions/concerns, don't hesitate to reach out!

I look forward to greeting you on [Day of the Week].

[Name of Sender]

Sample internal introduction email

Dear Team,

We have a fantastic new team member joining us on [Date]. [New Employee's Name] will be working in [Department] and will report to [Supervisor's Name]. Everyone who was involved in the hiring process is confident [New Employee's Name] will be a great fit, and we are eager for [them] to get started.

[Names of Lunch Dates] will be taking [New Employee's Name] to lunch on [Day of the Week] and everyone else should feel free to drop by to say hello.

Let's give [New Employee's Name] a warm welcome! [Their] success is our success.

Get excited to greet [New Employee's Name] on [Day of the Week]!

[Name of Sender]

“We want to focus on creating a memorable experience for the new hire in the first year rather than processing them in the first few weeks.”

Cheryl Hughey
Director of Onboarding,
Southwest Airlines

Preparing for new hires

Set up their work environment

New employees should come in on their first day to a CLEAN workspace and basic work necessities.

Think about what they will need for their role in the organization. To get a few ideas, poll some of your current employees on what they wish they had their first day.

“I spent time on the first few days of my job cleaning out my desk from the person who was there before me. I actually had to bring in cleaning supplies from home. I didn’t stay long at that place.”

~ Consultant, Nonprofits

PHYSICAL SPACE CHECKLIST

Think about what new hires need at their desks, and consider adding something special.

- Desk and chair
- Computer or laptop
- Phone and extension list/staff directory
- Keys for building, office, and/or filing cabinet
- Name badge and name badge holder
- Business cards
- Office supplies (e.g., pens, paper, stapler, etc.)
- Handbooks, directories, and important materials
- Swag (e.g., water bottle, t-shirt, pen, journal, etc.)
- Physical mailbox
- **Something Special:** A desk plant? A welcome sign? A signed card? A box of candy? A personalized mug with the organization's logo?

VIRTUAL SPACE CHECKLIST

Have your IT professionals set up the bare essentials of new employees' virtual offices.

- Email - **CAUTION:** Do not overwhelm their inbox before they start.
- Access to network
- Access to any shared (on the cloud) folders, documents, etc.
- Access to printers, faxes, scanners, etc.
- Lists - Make sure they are added to all appropriate internal lists for information distribution, especially the all-staff one.

BONUS POINTS

- Set a budget and let them order any other office supplies they may want on the first day.
- Put a gift certificate to a local restaurant or coffee shop in their top drawer for a fun surprise!

INTERNAL COMMUNICATIONS CHECKLIST

The arrival of new hires should not be a surprise to anyone in the organization, especially people with whom they will be working.

- **Send an all-staff email introducing the new hire including his/her bio and possibly a headshot.**
- **Communicate the new hire's desk location, email, and phone number—ask colleagues not to overwhelm him/her with work emails but encourage them to drop by to say hello or send a QUICK welcome email.**
- **Set and send lunch invites to the group(s) of staff for the new hire's first day or first few days.**
- **Assign a buddy who is not the new hire's direct manager and is at a comparable level of seniority.**

“Human beings are not things needing to be motivated and controlled. They are four-dimensional: body, mind, heart, and spirit.”

Stephen Covey
Author,
The 7 Habits of Highly Effective People

The First Day

The first day on the job can be overwhelming. The goal for day one is to acclimate your new hires to the environment, give them a sense of where things are, introduce them to a few colleagues, and get the paperwork out of the way.



Elements of a successful first day

These might not all happen on day one, but try to fit them into the first week.

- 1 Greet new hires at the door.**
A friendly face at the door will put them at ease.
- 2 Go over the schedule for the day.**
Take them to a comfortable space to look over their schedule for the day and answer any questions they may have.
- 3 Introduce new hires to their buddies.**
If your new hire has been assigned a buddy, introduce them and give them an opportunity to spend some time together. Consider having the buddy give the new hire a tour. If you have a mentorship program, the mentor can take the place of a buddy.
- 4 Give them a tour.**
Show them around, point out the functional areas in the space, show them the office layout, and introduce them to people as you walk around. This is a good time to let them know about any security procedures and protocols, bathrooms, lunchtime hangouts, coffee, etc.
- 5 Show them their space.**
Take them to their workspace, show them the set up, provide them the logins, and give them some time to settle in. Allow new hires time to complete their paperwork as they familiarize themselves with their workspace.
- 6 Ensure welcome from senior leadership.**
Have senior leaders welcome the new hires. Even if it is only a brief meeting, this can make a very positive impression on new employees.

7

Give them an overview of the organization.

Go over the mission, vision, and values of the organization. Explain how the organization is structured, what each department does, and how they interact. Give them an idea of how their roles fit into their departments and the organization.

8

Take them out to lunch.

Have one person or a small group take them out to lunch. At lunch, the group can share what they wish they knew on their first day, and the best parts of working there, as well as provide information about the neighborhood (where to eat, closest pharmacy, etc.).

9

Schedule a meeting with human resources.

Discuss work hours, overtime, use of paid time off, and the benefits package. Also, go over all policies and procedures related to safety at work, including sexual harassment. Specifically, those coming into jobs that are at a higher risk for harassment (e.g., development roles, leadership roles, manager roles, etc.) should be briefed on the organization's written policies and procedures for reporting and addressing any potential issues. Remind all new hires of when they are scheduled to participate in sexual harassment training.

10

Arrange a check-in with the supervisor.

At the end of the day, schedule a check-in with each new hire's direct supervisor. Use this meeting to go over the schedule for the first week, discuss working relationships, and debrief the first day. This is a good time to solicit feedback from new employees about their experiences that day so that supervisors can make sure to meet their needs moving forward.

Sample First Day Schedule

9:30 AM	Arrival
9:35 AM	Review the day's schedule
9:50 AM	Meet buddy and take a tour
10:35 AM	See workspace
10:45 AM	Organizational overview
12:00 PM	LUNCH
1:00 PM	Meet HR and finish paperwork
2:00 PM	Department head meet-and-greet
3:00 PM	Set up workspace
4:00 PM	Supervisor check-in
5:00 PM	Departure

“To lose the energy of a new hire through poor onboarding is an opportunity lost.”

Sarah Wetzel
Director of Human Resources,
engage:BDR

The First Week and Beyond

You should schedule most of the first week for your new hires. Provide them with enough structure to help them adjust to their new work environment, give them the opportunity to get to know the people with whom they will be working, and allow them time to ease into their own daily routine.

Events to schedule the first week

If you cannot fit them all into week one, try to fit them into the first month.

- 1 Cross-departmental meetings**
Convene meetings with other departments with which new hires will be working to introduce them to all the key players.
- 2 Meetings with other stakeholders**
What other stakeholders should new hires be aware of? If face-to-face meetings are not possible, is there someone who can brief them on these stakeholders? Consider giving them a list of people they should meet, and help in setting—or set—a schedule of when they should make time for this.

3

Time for check-ins and regular feedback

Ensure that the new hire is on track by making weekly check-ins a priority. Regular check-ins with a direct supervisor keep communication open and build a relationship based on trust and transparency. This is also a way to keep track of the onboarding process and make changes as necessary—a best practice for ongoing development and performance management. Discuss:

What can you expect from me?

What do I expect from you?

What worked well this week?

What could have been better?

How can I be helpful to you?

4

Short meetings

Coffee or short meetings with co-workers and stakeholders is an effective way for the new hire to get the lay of the land. Think about sending quick introduction emails to facilitate brief meetings with the right people.

5

Time to set expectations

Having clear expectations for the entire onboarding process will help new hires navigate it better. During the first week, work together to set clear expectations for the **first 30/60/90 days**.



6

Job shadowing

If this is an option, it is a great way for new hires to get an idea of what their days may look like. It also gives them the opportunity to get to know one person on a deeper level. Think about having them shadow someone of a similar seniority level.

7

Meetings with the supervisor

Is it possible to take new hires to a meeting and have them observe? Watching their supervisor in action helps build a relationship based on trust and respect.

8

Time to observe a program/event

If there is a program or an event coming up, consider having new hires attend or give them a small role. Seeing the work of the organization in action will help them feel connected to the mission.

9

Performance reviews

Performance reviews should be discussed at the beginning of the onboarding process to ensure full transparency. Although some surprises are fun, surprises related to performance reviews are not. Be open and upfront about the process, the timing, and the expectations.

10

Organizational calendar

Are there any projects, meetings, trainings, or events that are scheduled for the organization? Should new hires attend any of them? Will new hires be helping with any of them? Consider what may be helpful for new hires in their onboarding process.

11

Formal training in workplace safety

To demonstrate the importance of workplace safety, provide formal training around harassment policies and safety at work.

12

Something fun and energizing

Everyone wants to love what they do, so help new hires feel energized and happy to work for your organization. Consider giving them the opportunity to experience the fun side of your work culture. This is your opportunity to get creative!

Sample Schedule for Week One:

TIME	MONDAY	TUESDAY
9:00 AM	Arrival, view schedule, and tour with buddy	Arrive. Settle in at desk
10:00 AM	See workspace	Meet with supervisor to discuss portfolio of work, responsibilities, supervision, and performance reviews
11:00 AM	Organizational overview	
12:00 PM	LUNCH with David, Josh & Sue	LUNCH with Jon and Amy
1:00 PM	Meet with HR and finish the paperwork	At desk, review progress thus far on [Project/Program/Event]
2:00 PM	Department head meet-and-greet	
3:00 PM	Set up workspace	Team bonding experience
4:00 PM	Check-in with supervisor	

WEDNESDAY

Arrive.
Settle in
at desk

Coffee with Fern

Coffee with Sam

Meet with
marketing team

LUNCH
with
Tom

Meet with
admin team

At desk, work
on [Project/
Program/Event]

Check-in with
supervisor

THURSDAY

Arrive.
Settle in
at desk

At desk, work
on [Project/
Program/Event]

LUNCH
with
Dan & Linda

Off-site
meeting with
organizational
partners and
supervisor

Debrief at off-site
office and prep for
evening event

Leave for [Event]
venue to observe

FRIDAY

Arrive.
Settle in
at desk

Meet with
supervisor
to set goals for
30/60/90 days

LUNCH
with
Our Team!

Team building
learning lab

Conversations to have after the first 90 days

- 1 End of probationary period**

Many organizations have a three- to six-month probationary period. Most do not acknowledge its end or have a meaningful evaluation of the relationship at this point. The probationary period allows both parties to part ways if the relationship is not working. Consider having an end-of-probationary-period conversation to discuss what is working and what needs to change.
- 2 Training assessment and development needs**

Investing in your staff strengthens the talent pipeline within your organization. Have a conversation about the skills your new hires may want to develop in the next six months.
- 3 Onboarding debrief**

After 90 days, it makes sense to review the onboarding process. Create an onboarding evaluation to help inform your onboarding process planning and structure. Every new hire provides you with the opportunity to improve the onboarding experience for the next new hire. *Consider asking:* What do you wish you had known when you started working here? How can we improve the onboarding experience for our next new hire?

“When I arrived for my first day, no one knew I was coming. Security wouldn’t let me in until my new boss arrived, which was an hour after I got there. I had to wait in the lobby, frantically calling HR and my boss to make sure I was there on the right day.”

~ Director of Development, Nonprofit

4

Job goal assessment

A good way to ensure that new hires are adjusting well to their role is to have recurring conversations about the status of ongoing projects, what has been accomplished, what may need an adjustment, etc. Consider revisiting the previously established job goals to keep them relevant and flexible.

5

Safety at work

Continue the discussion with new employees about the importance of feeling safe at work, and reinforce the organization's commitment to creating a workplace that feels safe for everyone. Have there been any instances of harassment they want to discuss with you? Do they know exactly what to do if an issue arises?

Remember: The key to developing an organizational culture where harassment is rare is to immediately establish with all new employees that safety is a top priority, and that unacceptable actions will be addressed immediately.

"On my first day, I had to answer a fun survey about myself. I was asked things like 'What was your most creative Purim/Halloween costume?', 'What's your spirit animal?' and 'What's your dream vacation destination?' In the weekly staff email, a few days later, they included a different version of my bio based on my answers. It started a lot of great conversations with my co-workers!"

~ Assistant Executive, Mid-Sized Nonprofit

Sample onboarding evaluation

Evaluating the onboarding process is essential for continuous improvement. This will help you know what works and what needs to change so that the onboarding process will be even better for the next new hire.

How do you feel about your onboarding experience?

For each of the following statements, answer on the scale of Strongly Agree (SA), Agree (A), Neutral (N), Disagree (D), and Strongly Disagree (SD).

STATEMENT	SA	A	N	D	SD
I felt excited to begin work.					
I felt welcomed at [Organization].					
I work in a friendly and caring environment.					
I feel engaged in my work.					

What do you now know about the [Organization] and your role?

For each of the following statements, answer on the scale of Strongly Agree (SA), Agree (A), Neutral (N), Disagree (D), and Strongly Disagree (SD).

STATEMENT	SA	A	N	D	SD
I received key information about [Organization's] culture, mission, vision, and values.					
I received information in a timely manner.					
I know what is expected of me by my supervisor(s).					
I know what is expected of me by my co-worker(s).					
I understand my job responsibilities.					

What do you now know about the [Organization] and your role? (Cont'd)

For each of the following statements, answer on the scale of Strongly Agree (SA), Agree (A), Neutral (N), Disagree (D), and Strongly Disagree (SD).

STATEMENT	SA	A	N	D	SD
I understand how my role contributes to the overall mission of [Organization].					
I have the essential resources and support to do my job, or I know where to find them.					
I understand [Organization's] policies and procedures concerning performance evaluations.					
I understand [Organization's] policies concerning misconduct and grievances.					

Comments:

What were the most helpful meetings, conversations, and information provided during your first three months with [Organization]?

What meetings, conversations, and information do you feel were not helpful or not needed?

How can we improve the first 90 days for new hires?

Please share any comments you have about your onboarding experience.

Rate your overall onboarding experience.
(CIRCLE ONE)


Excellent Good Neutral Fair Bad

First year on the job

It is a best practice to have a performance discussion at the end of the first year. Many of the suggestions below are also appropriate topics to discuss with employees who have been with your organization for longer than a year.

Here are some topics to discuss at the end of year one:

- Did you meet your goals? How do you feel about the workload?
- What are appropriate goals for you in the coming year?
- What else do you need to be successful?
- How would you like to challenge yourself on the job in the next year?
- What skills would you like to develop further?
- What do you think you did well this year? What could you have done better?
- How can we improve the performance review process?
- What is the hardest part of this job for you?
- What is your least favorite part of the job?
- What is your favorite part of the job?
- Do I feel safe at work and do I help others feel safe at work?



“On my desk, on the first day, I found so many great surprises. My boss got me so much cool swag and even a Staples card to use on all the office supplies I would want beyond the usual pens and post-its. If you think that’s cool, they also framed my business card and added a note saying, ‘We’re thrilled you’re here!’”

~ Entry-level staff, Nonprofit

ABOUT LEADING EDGE

Founded in 2014, Leading Edge seeks to influence, inspire, and enable dramatic change in attracting, developing, and retaining top talent for Jewish organizations so that the Jewish nonprofit sector may thrive.

