Think Big

How to Build a Long-Term Onboarding Program

From Parklet's "How To" Series

Parklet

Table of contents

Parklet

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 to 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! Parklet has put together this guide to building a comprehensive onboarding program.

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*

- Companies that use Parklet for onboarding experience 75% lower employee turnover than the industry average.

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

Parklet

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.

Pre-boarding allows you to take care of some of the nuts and bolts of orientation so that you can create a first day for new hires that's focused on building relationships and understanding their role.

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 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 Parklet so they can familiarize themselves with their coworkers.

- Share contact information for HR staff or employees who can address their questions prior to their start date.

These tasks clearly resonate with new employees since 97% of our customers' new hires log into Parklet before their first day.

Parklet

Here's the *SendGrid prescription for pre-boarding success.*

- Let new hires request their preferred computer setup in advance.

- 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, who to contact with additional questions.

- Ask new hires to complete their profile information for Parklet.

- Request information to complete a 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 1.

> *"Pre-boarding is 'the new black'"*
>
> -Emily Staebell
> People Ops Generalist at SendGrid

> *"New hires **love** using Parklet. In fact, it is a top contender for things they've enjoyed most throughout their onboarding experience."*
>
> -Emily Staebell
> People Ops Generalist at SendGrid

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.

SendGrid®

With Parklet's help, SendGrid has:

- Onboarded 54% of the company.

- Completed an average of 101 tasks per new hire.

- Consolidated and simplified the work of an average of 10 people per new hire.

Parklet

Onboarding vs. orientation

One of the biggest problems with onboarding is that this term 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"?

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

Hallie Pierson, Director of Human Resources, Talent Operations & Rewards at Constant Contact puts 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—things 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. 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 6 months because they haven't received clear guidelines about their responsibilities.**

*The Wynhurst Group SHRM presentation 2007

**www.shrm.org/hrdisciplines/staffingmanagement/articles/pages/onboarding-key-retaining-engaging-talent.aspx#sthash.Uqim92mf.dpuf)

Parklet

Onboarding: not just for HR

In order 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:

- 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.

- And finally, utilizing technology and tools to meet the daily tasks associated with starting a new role.

33% of new hires want management to be responsible for onboarding them*

Parklet

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 the buddy system a volunteer initiative for current employees. Let 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. You can also ask buddies to take new hires on a tour of the office or neighborhood.

How can Parklet help you coordinate tasks with multiple people?

"Employees (including HR) are able to easily view all outstanding tasks, and it's easy for HR to follow up on things that need to be done! Everything is very clean and easy to use."

-Kim Rohrer
Director of People Operations at Disqus

The multiple layers of onboarding

Onboarding not only involves multiple people, but multiple layers within an organization. Dr. John Sullivan outlines the five organizational layers of onboarding in this way:

- *Corporate level.* Covering signups 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.* This level covers things related to the department the new hire is joining.

- *Team/Job level.* Covers things related to this person's work team and job.

- *Individual level.* Covers things at the team level that relate to the unique and diverse needs of this individual.

Onboarding remote employees

Whether you are welcoming employees at a satellite office, opening a new branch from afar, or building a workforce of full-time remote employees, it's important to offer a warm welcome, even if you can't do it in person. Arlynne Santos, Parklet's Office Manager, offers the following tips and tools to 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 that are legitimately and legally binding.

- Side-note: in our wonderful state of CA, we are required to physically *verify the original documents for I-9s.* Luckily, there are a plethora of on-demand services. 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.

- My personal favorite for reliability is *FedEx*. 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 are out-of-office, they are very much a part of the team.

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

- Here in San Francisco, I love *CopyMat* for printing and signage and *DCL* for clothing and embroidery.

Parklet

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!

- It's important to capitalize on opportunities for them to face their teammates, and vice versa.

- Over-communicating should be your goal. Given the nature of remote situations, anything less could quickly and easily lead to a lack of communication.

5. Team meetings / all hands

- Set the expectations 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 the meeting. For something simple and direct, I'd suggest *appear.in*. It's 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!

- I especially encourage this with remote employees just to ensure everyone is in sync.

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 as 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.

Pro tip

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.

Recommended activities: week 1

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 as well.

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

Here are 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 type	Examples	Participants	Organizer	Purpose
Orientation	Employee handbook overview, computer set-up	HR staff, new hire	HR	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 has made this hire	Direct manager, new hire, CEO or executive management (when appropriate)	Direct manager	Provide employee with 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 solid understanding of company and industry
Meet the CEO/executive management	Short meeting or social outing with CEO/executives	New hire, CEO, other executives	HR	Make new hire feel welcome, keep executives in the loop about new hires, promote communication
Workplace buddy socializing	Lunch, coffee, or walk around the neighborhood	New hire, new hire's assigned buddy	Workplace buddy	Promote workplace friend-ship and inter-departmental communication
Company policy overview	Introduce rules and regulations, share pointsof contact for various concerns	New hire, HR or direct manager	HR or direct manager	Familiarize new hire with policies and procedures, facilitate problem-solving
Equipment and software setup	Getting email address, setup software licenses and accounts	New hire, IT	IT	Provide all materials employee needs to do their job
Getting the lay of the land	Setting up physical workspace, getting building access	New hire, facilities	Facilities	Allow employee physical space to perform their job
Payment logistics	Setting up payroll and direct deposit	New hire, accounting or HR	Accounting or HR	Ensure employee is paid in a timely fashion

Parklet

Checklists for week 1
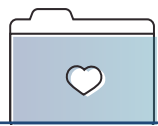
Human resources

- Oversee new hire orientation

- Organize social activities

- Facilitate meetings with CEO and executive leaders

- Assign a workplace buddy

- Go over workplace policies
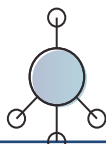
Direct manager

- 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

- Discuss major company policies and points of contact for various issues

Workplace buddy

- Take new hire to lunch

- Go on a walk around the neighborhood/campus

- Invite new hire for a quick social outing (coffee run, snack break, etc.)

Parklet

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 short-sighted. 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 a few 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**

Here's what an Employee Development Plan might look like for a Sales Development Representative.

Month 1-3

Job-related goal: Return all client phone calls within 30 minutes.

Project-related goal: Research competitors and add to SDR training manual.

Professional development-related goal: Learn how to create a report in Salesforce.

Performance goal: Arrive at work at least ten minutes before daily stand-up meeting.

Month 3-6

Job-related goal: Create at least 100 new leads in Salesforce every week.

Project-related goal: Write a drip campaign for at least three different types of prospects.

Professional development-related goal: Deliver a presentation to the entire office.

Performance goal: 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 feel excited to follow.

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 greater 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	Recurring weekly/ bi-weekly/monthly (as appropriate)	Direct manager	Provide a forum for support
Recognition	Recurring daily/weekly/ monthly/quarterly (as appropriate)	Direct manager or HR	Promote employee engagement and satisfaction
New hire leadership training (e.g. leading a meeting, teaching a lunch and learn session)	Quarterly (or as appropriate)	Direct manager	Encourage new hire confidence and professional development
Social activities	Recurring	HR, assigned buddy	Ensure new hire is welcome and included in company culture
Feedback collection	Recurring at key points like end of orientation, first month, third month, six 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

Parklet

Checklists for months 1-6

Human resources

○ Ensure employee knows about forums for giving and receiving recognition

○ Solicit feedback at key points in onboarding such as the end of month 1, month 3, and month 6

○ Plan regular company-wide social activities
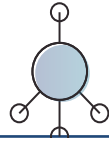
Direct manager

○ Set up regular recurring one-on-one meetings

○ Ensure employee knows about forums for giving 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

A *few 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 "100-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. (Parklet profiles have customizable fields, making it super simple for new hires to share this type of information.)

Parklet

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 at Constant Contact believes that "*Feedback is a gift.*" New hires there are surveyed three or more times during their first 90 days. Additionally, Constant Contact 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."* They made sure to conduct these sessions prior to a new hire's 90-day mark, so they could catch any major issues early on. Since instituting this program, their 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 use

- How is everything going so far? What have been some highlights of your experience? 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 process?

- What feedback do you have 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 to do your job better?

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:

- The orientation experience provided me with a clear outline of my job description and responsibilities.

- I have a clear understanding of the company's mission and vision.

- I know who the points of contact are for different issues like benefits, payroll, and expense reimbursement.

- I was introduced to managers from every department.

- I feel well prepared to succeed in my job after attending orientation.

Parklet

Parklet

Parklet helps companies grow, engage, and retain their talent.

————————————

To learn more about our Employee Onboarding and Engagement solutions, contact our sales team.

www.Parklet.co