



5 Steps to Create a

# Successful Onboarding Process

---

Yanay Zaguri  
Product Director, Kryon Systems

# Table of Contents

- Introduction ..... 3
- Step 1: Create a clear and formal plan for your program..... 4
- Step 2: Engagement, Engagement, Engagement ..... 6
- Step 3: Offer Ongoing Education and Support ..... 8
- Step 4: Best Practices..... 11
- Step 5: Follow up ..... 12
- Conclusion ..... 13

# Introduction

Gone are the days when welcoming new hires meant handing over a folder with the company goals, a job performance checklist, and orientation paperwork. Today employee orientation has been redefined as "Employee Onboarding." It is no longer a single one-day event, but an ongoing process that continues at some level for the entire length of employment.

A well-planned and well-executed onboarding process will increase the chances for a positive work experience leading to a win-win relationship between the new hire and your company. Reports show that 54% of organizations see greater new hire productivity and 50% higher retention rates for new hires when they have a standardized onboarding process in place<sup>1</sup>.

The onboarding process should be viewed as a valuable engagement opportunity - revolving around the individual employee experience and the ability to understand their career progression objective and how to align business objectives while helping employees reach their goals. Better employee engagement and socialization of new hires greatly minimizes the instances of employees feeling like they've just been thrown into the job without any real care or consideration.

Training and support play a large role in setting the tone of the new hire experience – inspiring confidence, motivation and a feeling of belonging to the company they are now a part of. An effective training strategy is critical in helping new employees achieve their business goals and contributes to the company's bottom-line success. Today's current training methods, such as eLearning and electronic performance support systems (EPSS) offer a great deal of flexibility and can be customized and incorporated right into your existing training program. These innovative solutions not only result in greater learning for your trainees but also offer a more organized, cost effective training approach.

According to a study by Equifax, forty percent of employees who left their jobs voluntarily in 2013 did so within six months of starting in the position<sup>2</sup> and research from the British Columbia Human Resource Management

40% of employees who left their jobs voluntarily in 2013 did so within six months of starting in the position.

Association suggests that turnover can be over 30 percent in the first three months<sup>3</sup>. A balance of immediate and on-going engagement and support are the key drivers for laying the groundwork in a successful onboarding process and reducing turnover rates in the critical three to six month period.

An effective onboarding program positively impacts employee retention, job performance, and job satisfaction. It creates an encouraging, upbeat environment with clear indicators of how new hires should fit in and contribute. The rewarding results include positive employee relations, retention, productivity and a return on investment.

This eBook explores the five top steps for creating a successful onboarding process, vital for companies who are thinking about introducing a formal onboarding program or are looking to improve their current process.

# 1

## Create a clear and formal plan for your program

Best-in-class organizations are more likely to have a formal and comprehensive onboarding program in place that goes above and beyond basic employee orientation and informal hiring procedures. Formal onboarding programs should outline and train the new hire for activities during the first few days, weeks, and months of employment.

The most effective programs take this one step further and extend the program through the first 90 days, 6 months and in some cases even longer. When creating a formal plan, it is important to look at the key steps. Specify what, when, and how each onboarding phase is going to happen, the objectives, how it will be supported through resources, and budget, as well as the key staff who should be involved.

### Define your goals and objectives

Employee engagement and support are key drivers in onboarding programs, but there are goals and objectives that need to be considered as well. The company's end goal is to increase retention rates and shorten the time it takes for a new employee to be truly productive. To accomplish this, your formal onboarding plan should comprise the following:

- Create a welcoming and supportive environment for new hires
- Provide the tools, resources, and logistical information the employee needs to navigate and feel comfortable in the new environment
- Familiarize the employee to the culture of the organization
- Provide required job skills training
- Clarify the department goals and objectives
- Set goals and expectations for the new employee
- Introduce the performance management system for evaluating employees
- Ensure the new employee receives coaching and mentoring (both in-person and online) throughout the onboarding process

## Onboarding begins before Day 1

Don't forget that effective onboarding begins even before the first official start date. Putting together and delivering a new employee package to new hires before they begin can increase their comfort level on Day 1, cut down on "forms and policy overload," and save valuable time during the first days on the job.

Many companies choose to send necessary legal forms along with the formal offer letter. You can also send an employee handbook with information about the job responsibilities, the work environment, and the organizational culture. Ask for the employee to review the information, fill out what they can in advance and bring the paperwork with them on their first day. This not only saves time on the first day, but also allows them to arrive better prepared and informed. It also allows them the opportunity to ask questions before they start, which could be particularly important if you are trying to process several new hires on the same start date.

## Make sure your hiring managers are on board

The best designed and thought-out plan, with the latest and greatest training tools, is useless if the people who need to implement it do not support it. Many onboarding programs fail simply because no one is directly responsible for them. To make sure your hiring managers are on board, get their input during the development stage and request their feedback about the implementation and effectiveness of the program.

Also ensure that the managers have training on coaching and mentoring new employees. In addition to coaching new employees themselves, they should also assign and train peer coaches to assist and mentor new employees.

# 2

## Engagement, Engagement, Engagement

Engaging and empowering new employees is a vital step in the process to align the employee with the organization's values and goals. Engagement is also a huge factor when it comes to motivating the employee to contribute to organizational success and helps enhance their own sense of well-being.

### Engagement during the first day/week/month

Ensure you live up to your values or mission statement. Provide key insights into their role and how to fit into the organization and its culture. A strong, genuine company culture that is distinct and consistent helps employees feel that they are a part of something more meaningful than just a job.

### Assign a go-to person such as a peer sponsor or "buddy"

Bringing new hires onto the team is like introducing your boyfriend/girlfriend to your parents for the first time: You want them feel wanted and accepted. A good first step is doing a quick introduction with the team. Then be sure to assign them a peer sponsor or "buddy" that can help them feel they have a safe place to ask any questions. It's recommended to pick a mentor who will interact with them on a relatively equal level, like a member of the department, but not a manager.

### Discuss and set career goals together

60 percent of companies indicated that they do not set any milestones or concrete goals for new hires. In turn, it takes many new hires a whole year to start working at their full potential<sup>4</sup>. An employee without any performance goals can lead to employees performing lower than expectations. By defining these goals and expectations you provide employees a bar for them to work towards. To get them working at their full potential make sure your company's goals as well as their own performance goals are clearly explained. More importantly, discuss and set career goals with the employee early on so that personal goals and company goals are aligned.

## Actively manage and give feedback

Your new hires want to become productive quickly. You may think that means stuffing new hires with as much information as possible and doing it as quickly as possible, but that type of onboarding overload does not produce positive results. Instead, pace the training to match the employees learning ability. Don't forget to get early feedback and keep a line of communication open with them so they have a channel to express issues freely. In a survey conducted by BambooHR, 53 percent of respondents who quit jobs within the first six months said "review and feedback of early contributions" is one of the most important things a new employee needs to get up to speed and begin contributing quickly<sup>5</sup>.

## Recognition and rewards

Studies show that a lack of praise and recognition is a top reason that employees are unhappy at their jobs<sup>6</sup>. Managers should make sure stellar employees who are engaged, communicative and productive are publicly, instantly and consistently rewarded. These employees and their efforts should not be taken for granted - they are the ones who will help you achieve your company goals and potentially, motivate others to become more engaged. They are also the examples other employees look to when trying to improve themselves professionally.

# 3

## Offer Ongoing Education and Support

Organizations with high employee engagement are likely to boast a culture of learning and development - this begins with the onboarding program. This is your chance to make a great first and lasting impression while ensuring your new employees are acquiring the necessary job skills.

### Provide coaching to accelerate performance

New hires rarely come to work the first day with every skill necessary to do their job. Therefore skill assessment is needed during the hiring process or in the first few days by the manager to determine what is needed to get them ready to work at their full abilities. The employee should then be assigned a coach to help him/her develop their skills and meet their performance goals. A coach, in contrast to a peer sponsor or "buddy" described in Step 2, can be a manager and is there to provide more technical guidance and training while keeping the employees own job performance in mind.

### Develop customized training methods and adopt new technologies that drive learning effectiveness

A report from the Aberdeen group called "Onboarding 2013 - A New Look at New Hires," points out that when companies invest in onboarding systems the organization is able to dramatically reduce costs, create higher levels of engagement with new hires, establish consistency across the organization and extend support after the initial onboarding process<sup>7</sup>.

Choosing the right form of training is a core part of creating a successful onboarding process. While many training programs are still conducted in the classroom setting, an increasing number of organizations are seeing the benefits of blending traditional employee training methods with web-based knowledge management systems and electronic performance support systems (EPSS). These systems are designed to deliver and manage instructional content, track learning progress and offer ongoing support enabling organizations to significantly reduce the cost of training and educating their members.



Online knowledge management software enables companies to organize their resources and share organizational knowledge across multiple departments – leveraging the expertise of people across the organization and providing support. It also enables employees to quickly and easily locate information. eLearning technology can be used to create customized training and education software. This can include lesson plans, monitoring learning progress, online tutorials, and online classes.

However, once employee's leave the training environment they have to put all that knowledge to work which is often not as simple as it appears. Even with the best training programs, knowledge retention is always an issue as employees do not retain 100% of what they learn during the training sessions. Take into account that today's new hires are expected to learn technical systems that require detailed step-by-step processes such as ERP solutions, accounting software and CRMs, and this can lead to frustrated employees who can't complete the task.

Performance support systems help fix that frustration by providing assistance directly within the business application and guiding the employee through the steps of the process without the need to look for the information, learn how to do it and then return to the task to apply this knowledge. Higher tech solutions even automate this process so employees simply click a button to accomplish what they want without having to learn it at all.

Performance support systems can also be used to compliment and improve the effectiveness of a company's classroom training program. Wizards walk trainees through exercises - further strengthening what the instructor is describing - while allowing them to learn directly within the actual business application they will soon begin to use on the job.

In addition, most formal training programs only have time to focus on commonly used processes and omit processes for less frequent tasks and scenarios. In this case, the performance support system can supplement the classroom training by providing on-the-job training when an employee needs to complete a task that wasn't covered in their initial training.

## Online Knowledge Management Tools:

- **Knowledge Base or Wiki**

A centralized repository for information: a public library, a database of related information. Most people are familiar with Wikipedia which is a social knowledge base. Some popular systems that can be implemented with your own company information include: Twiki, Raneto, and phpMyFaq.

- **Online Portal for Self-Study**

Similar to a knowledge base but these are deep dives into specific topics. Many popular ones come from universities and other organizations like: MIT OpenCourseWare, Ted Talks, Khan Academy, Stanford OpenEdX.

- eLearning/Learning Management System (LMS)

Provide new employees with quick access to relevant onboarding materials and resources. These systems can be implemented for your organization and then your own materials added to them or you can use an external service with specific skill or knowledge based learning modules already set up. Popular tools include Moodle, Blackboard, and Sakai. Popular services include Grovo, Halogen Learning, and Edvance360.

## Performance Support Systems:

- Electronic Performance Support System (EPSS)

Relatively a new player in the industry, performance support systems are quickly being adopted as the best-in-class technology solution to keep employees supported, well-trained, and working at their full potential.

Organizations may spend thousands on learning management systems, eLearning authoring tools and training facilities - just to see trainees' proficiency drop soon after they're back at their desks, handling live situations. Performance support allows users to navigate through any business application and complete business processes quickly, and error-free, on live applications in real time.

Kryon Systems is a leading provider of performance support systems with automation for online and offline applications.

Customize your training methods so they are tied directly to your business objectives and well as tailored to your trainees' specific needs – in terms of content and delivery method. A blend of traditional and newer approaches will likely be most effective to cater to the varying learning needs of your employees.

# 4

## Best Practices

### ✓ Formalize a strategy

Create and design a formal onboarding plan. Engage key parties in planning. Be clear in terms of who, what, when, where of onboarding and ensure everyone is committed to the plan prior to implementation. Ensure that you have the material, staff, technology, and measurement in place to support the strategy.

### ✓ Set written, measurable goals

Recognize that onboarding takes place over time. Use milestones: 30-60-90-120 days and up to 1 year on the job to set goals. Provide absolute clarity to the new hire in terms what is expected of them during each stage. These goals should be reviewed and reevaluated at these intervals as well.

### ✓ Implement basics prior to the first day on the job

### ✓ Engage and empower

Onboarding provides a valuable engagement opportunity and key job knowledge to get the new hire onboard. It also helps them to define and understand their role and how they fit into the organization. Empower new employees by providing clear action steps they need to accomplish during each phase of the program and provide support mechanisms where needed.

### ✓ Create a culture of learning and support

### ✓ Utilize technology to facilitate the process

### ✓ Accountability

Who is accountable? Is it the employee, manager, training department? Accountability and responsibility is shared among many parts of the organization. Ensure that the key players responsible for the new employee's performance are involved and that communication amongst them is clear. Both the employee and the hiring manager should have the opportunity for feedback and be provided support when needed. A sponsor from within the department can support the new hire as well.

# 5

## Follow up

Each employee is unique and even the best systems will not fit the needs of each employee. To ensure that nothing falls between the cracks you need to continuously evaluate whether the employee onboarding plan is meeting company goals and objectives. Interview and survey new employees as they are going through the onboarding process and after they have been on the job for 6 months and a year. From this feedback, you should learn if the program is being implemented as designed, how the new employees feel about the onboarding experience, and if employees acquire the requisite knowledge. Talk to the hiring managers and peer sponsors to get their feedback about what they thought about the program and if new employees are meeting performance goals at the expected time. And finally, revise your program based on the feedback you receive.

Creating an effective program may seem like a daunting task. However, the results are more productive, happier employees that stay on the job longer. Good employees are hard enough to find and get through the hiring process - an effective onboarding program can help ensure they become higher performing employees. Get started now and grow and refine your program over time. Just as onboarding is a continuous process, so is creating an onboarding program.

## Conclusion

Onboarding has gained a lot of traction in business in the last several years as internal processes and enterprise applications become more powerful and complicated. According to recent statistics, new employees who attended a well-structured onboarding orientation program were 69 percent more likely to remain at a company up to three years<sup>8</sup>. When implemented effectively, employee onboarding can create value for any organization by helping employees to understand the company structure, master the ins and outs of their job, and have a positive impact on career goals. This leads to higher job satisfaction, organizational commitment, decreased turnover and better performance levels.

The most effective onboarding processes share a common element, which is that training and support do not stop at the end of the onboarding period. Ongoing engagement, training and support are key factors for success. In today's high-tech world, the knowledge that is needed to succeed on the job is constantly evolving and growing - making it more critical than ever to offer continuous support and learning opportunities to employees. This can be in the form of mentors, peer sponsors, coaching, traditional and online training. Innovative technologies such as performance support systems can accompany an employee throughout their lifetime, to provide on-the-job guidance and assistance on an on-going basis.

With an efficient employee onboarding process in place for your team, your company can take on a new direction towards more productivity and a more profitable bottom line.

Invest in your new hires and give them an exceptional first experience, so you can both know they made the right choice.

## About Kryon Systems



Kryon Systems' patented image recognition technology wraps any enterprise application with context sensitive support, real time guidance and enforcement of best/required practices. Because of its innovative, patented technology, Leo performance support platform can work on any application and across multiple applications without requiring integration. Leo provides two modes of support to users: Guide Me takes the user through the business process like a GPS or Do It which performs the task for the user like an Autopilot. As a result, employees have the information and support they require, at their moment of need, to reduce average handling times, deliver timely service and achieve target KPI. Leo was named 2015 CUSTOMER Product of the Year which highlights products that enable their clients to meet and exceed the expectations of their customers.

For more information, please visit [www.kryonsystems.com](http://www.kryonsystems.com) or visit our [LinkedIn](#) page or [blog](#).

## About the Author



Yanay Zaguri is a professional instructional designer experienced in organizational learning. Yanay is the author of multiple onboarding programs for enterprise organizations and has introduced a special evaluation program for onboarding processes and effective feedback. Today, Yanay is the Product Director at Kryon Systems responsible for the Leo Performance Support solution.

## References

1. [http://www.impactinstruction.com/wordpress/wp-content/uploads/2013/07/2013-Onboarding-Report\\_FINAL-REPORT.pdf](http://www.impactinstruction.com/wordpress/wp-content/uploads/2013/07/2013-Onboarding-Report_FINAL-REPORT.pdf)
2. <http://www.talx.com/benchmarks/turnover/index.asp>
3. <http://www.theglobeandmail.com/report-on-business/small-business/sb-managing/tips-for-a-new-hires-first-90-days-on-the-job/article4183310/>
4. <http://talent.linkedin.com/blog/index.php/2014/06/what-do-new-hires-want-from-onboarding-infographic>
5. <http://www.fastcompany.com/3032099/hit-the-ground-running/6-ways-to-avoid-losing-your-new-hires>
6. <http://www.entrepreneur.com/article/229885>
7. <http://aberdeen.com/research/8383/ra-strategic-onboarding-talent/content.aspx>
8. <http://www.shrm.org/about/foundation/products/documents/onboarding%20epg-%20final.pdf>