

How great organizations welcome new employees



A complete guide to best practices
for onboarding new employees



Be Brilliant.

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Introduction:

Are you making a great first impression?

Think back to your first few days, weeks and months in your current job. Did your organization make a great first impression?



Did you feel welcomed?



Did they do things to help you quickly become proficient in your new role?



Were there experiences that cemented your relationship with your manager, co-workers or organization?



Or did the experience leave you wondering if you'd made a big mistake?

In some organizations, the onboarding process is limited to the employee's first few days of work, and involves little more than filling out some payroll and benefits paperwork, and completing some mandatory training.

In others, the process extends up to a year and is thought to start at the recruiting and hiring experience.

And some still have no formal onboarding process at all.

Yet how you onboard a new employee can have a significant impact on both the employee's and your organization's success.

You don't just need to make a great first impression, you also need to lay the foundation for a strong, lasting and productive working relationship.

Is your onboarding process doing that?

The purpose of any onboarding program or practices is to welcome new employees to your organization and help them become high performing in their new roles as quickly as possible.

The business impacts of onboarding processes

Recent studies show that [*strong onboarding experiences*](#) can increase retention rates for new hires by up to 25%.

According to research by the Aberdeen Group, and the Corporate Leadership Council, organizations with effective onboarding processes have:



better new hire retention



greater year-over-year improvement in revenue per full-time employee



better, sustained customer satisfaction



better employee engagement

The bottom line: employee onboarding is something you can't afford to ignore.

In this eBook, you'll:

- Discover the onboarding best practices research says every organization should have in place.
- Learn how you can adopt these best practices in your organization using the Halogen TalentSpace™ suite.
- Read success stories from organizations that have implemented these best practices and are seeing some great results.

Five standout ways to welcome new employees

You put a lot of time, effort and money into recruiting and hiring the best candidate for a job.

So you should do all you can to make them feel sure that accepting your job offer was the best decision they ever made.

Research from Bersin by Deloitte, the Aberdeen Group, ERE, the Corporate Leadership Council, HCI and others has revealed five best practices that make onboarding processes truly effective:



Extend onboarding activities beyond the initial three months



Communicate role expectations up-front



Invite the employee to communicate his or her value and to contribute early on



Integrate learning into the onboarding process



Set the employee up for success with 30-, 60-, and 90-day reviews

Each of these practices helps you lay the foundation for a strong and lasting working relationship because they help you set up a new employee for success. And that leads to success for you too!

Now, let's look at each of these five best practices in more detail.

Do you need specialized onboarding software?

While some companies have specialized software applications to manage their onboarding process, many just use their existing learning management system and performance management software.

Specialized onboarding software modules have their benefits, however if they operate outside your other talent management processes you're not maximizing the potential of integrating the process with recruiting, performance and learning. Read on to learn more.



Best practice #1

Extend new hire activities beyond the initial three months

If your goal is simply to get HR and administrative paperwork completed, and give the employee the facility and computing passwords they need to get working, you probably only need a few days to complete your onboarding process/tasks. Throw in some mandatory training and a few meetings and, voilà, you're suddenly at the three-month mark.

But the Aberdeen Group, Bersin by Deloitte and others have found that if you extend onboarding activities so they span six months to a year from the employee's start date, your process can be far more effective in familiarizing new employees with your culture and supporting their high performance.

Remember, you're not just welcoming new employees, you're laying the foundation for a great working relationship that will last.

What's the extra time for?

Experts recommend starting more intensively, with several orientation activities in the first few days or weeks, but then continuing to conduct periodic onboarding activities throughout the first year.

Initial activities can include activities like:

- Completing HR forms
- Completing mandatory training (ethics, harassment, health and safety, information security, etc.)
- Meeting their immediate manager and team
- Getting access to facility and required communication/IT networks
- Meeting leaders/executives
- Getting introduced to the organization's mission, vision and values

Longer term activities can include things like:

- Meeting with key contacts across the organization
- Taking training on the organization's products, services and/or processes
- Assessing learning needs related to the role and addressing them with development plans
- Setting goals and regularly reviewing performance/progress
- Conducting 30-, 60-, 90-day performance reviews
- Conducting a new hire survey after 90 days to gauge the success of onboarding activities to date
- Teambuilding
- Creating a career development plan
- Establishing a relationship with a mentor

Extended benefits

When you schedule and conduct employee onboarding activities throughout the employee's first year of service, you:

- Allow the organization and employee multiple “touch points” where they can get to know each other.
- Provide more opportunities to clearly communicate expectations for their role and performance.
- Give the employee the support they need to become proficient and high performing in their role.

When you invest time and resources into ensuring your new employees' success, you communicate their importance and value to the organization.

The results:

better employee **engagement, performance**
and **retention**

How long should your onboarding process be?

It depends... on the individual role, its complexity, and the nature of your organization and its products/services.

Only you and your employees can determine the optimum length and mix of activities.

Generally, research tells us that a process lasting 6-12 months is more effective than one that lasts 1-3 months.

For an overview of some of the activities you might want to include in your onboarding process, read [7 steps to effectively onboard a new employee](#).



Should you start onboarding activities before the employee actually starts work?

Some companies are choosing to begin onboarding activities before the employee's first day of work, having them complete "paperwork", administration and training — sometimes via an onboarding portal.

While there can be some advantages to this, it means the employee can focus on work rather than on forms and administration on their first day. It also gives them time to reflect on things like benefit options, and can build excitement for their new job. But just a word of advice: you should be careful in adopting this practice. In some countries or jurisdictions, and with some classes of employees, it may not be legal to require an employee to put in time completing onboarding tasks and activities before they are in your employ, and on your payroll.

And even where it is legal, completing this work on their own time, before they're actually employed by you, might cause your new employee hardship.

A conscientious employee who's given their notice will likely be busy finishing off work and transitioning their responsibilities at their former employer. The extra workload brought on by your onboarding process may not be welcome.

You also need to think about what this required "pre-work" work says about your organization and your culture. Do you expect all your employees to regularly complete unpaid work on their own time, evenings and weekends? Does your organization respect the boundaries between work and life outside of work, and encourage work-life balance, or not?

Think carefully about the benefits and challenges associated with onboarding activities that start before an employee's actual employment with your organization, and implement these with care.

How you can **make the best, and right,** first impression?





Best practice #2

Communicate role expectations right from the start

While you may have spelled out your expectations for the role in the job posting, and discussed it during the interview process, time has passed since then. The details may be fuzzy now, which makes it really important to clearly communicate role expectations to every new employee when they start their new job and to check for understanding.

There are several ways you can and should do this. And, as you'll see, it's a job for both HR and the manager:

- Give the employee an up-to-date job description that clearly lists job accountabilities.
- Have the employee review and sign their job description, indicating their knowledge of its contents.
- Discuss the core and job-specific competencies that make someone successful in the role and that the employee will be evaluated on. Talk about how they would demonstrate them in their role.
- Communicate the organization's and the department's high-level goals.
- Assign the employee role-appropriate goals and explain how they'll help the department or organization achieve its goals.
- Set up a means to regularly discuss goal status and review performance.

It's a lot of information to take in all at once, so you need build in ways to communicate expectations over and over again.

Communicating expectations requires a conversation. The employee needs to be able to ask questions and receive guidance when they need it. The manager needs to coach, clarify and guide the new employee on an ongoing basis.

When you clearly communicate role expectations right from the start, you help set the new employee up for success and you build engagement.



Are you interested in learning more about how to communicate role expectations? Read: [*Best practices for communicating role expectations.*](#)



Best practice #3

Invite the employee to communicate their value and contribute

Until now, most advice about onboarding a new employee has been about finding ways to “enculturate” them. It’s been about getting them to “fit in” with the organization and its way of doing things, and to sign on to the organization’s mission, vision and values.

But new research is finding that it’s equally, if not more important to allow the new employee to communicate their authentic best self to the organization.

The goal here is not to get the employee to conform to the organization’s **“culture”** and **“way of doing things”** at the expense of their **own values** and **identity**. It’s to invite them to join the organization’s culture in a way that is enriching to both.

When organizations give new employees opportunities to share their unique skills, experience, knowledge and perspectives, as part of their onboarding process, they see increased job attitudes, performance and retention.

There are several ways you can help a new employee let their manager, team and organization know who they are, and what specific knowledge, skills, experience, competencies and values they bring to the organization.



One simple way is to ask new employees to reflect on these four basic questions* and then share their answers:

1

"What three words best describe you as an individual?"

2

"What is unique about you that leads to your happiest times and best performance at work?"

3

"Your Personal Highlights Reel: Reflect on a specific time – perhaps on a job, perhaps at home – when you were acting the way you were 'born to act.'"

4

"How can you repeat that behavior on this job?"

* From [Administrative Science Quarterly, Breaking Them in or Eliciting Their Best? Reframing Socialization around Newcomers' Authentic Self-expression](#)

Think about it...

You hired the new employee for a specific reason. You saw something in them in the interview process that made them stand out from the rest.

Why not make the most of this?

Put them to work

It's also important to, as quickly as possible, get the new employee working and contributing to the organization.

Why?

Because their fresh perspective can be invaluable in identifying opportunities for improvement.

And they're likely feeling a bit unsure of themselves and feeling the need to prove their value. We've all been there — right?

The best way to tackle these feelings is to put your new employees *to work*. When they've started their new role, solicit their ideas, opinions and observations. Assign them tasks and goals they can tackle right away and from which they can gain a sense of accomplishment. This will help them build their confidence and feel valued and connected to the organization.



Best practice #4

Integrate learning into the onboarding process

In their research, the Aberdeen Group found that best-in-class organizations make learning a part of their extended onboarding process. Others have found that learning at this stage:

- helps a new employee adjust
- has a positive impact on job satisfaction and retention
- can help accelerate productivity
- can help build a learning attitude into your culture

All great reasons for making learning part of the process.

To cover all the bases, your extended onboarding process should include:

- Any mandatory learning for new hires (areas that include health and safety, ethics, anti-harassment, etc.)
- Development activities that help the new employee learn about the organization, its products/services, any processes they need to follow, and tools they need to use
- Initial and ongoing development planning to help the employee acquire any additional knowledge, skills or experience they need to succeed in their role or to achieve their goals
- Initial and ongoing career planning so that you develop the employee for career progression right from the start

As Bersin by Deloitte identifies, learning should be strategic and designed as an experience, ultimately to improve performance and meet business goals.





Best practice #5

Set the employee up for success with 30-, 60-, and 90-day reviews

Finally, the fifth best practice related to employee onboarding is to conduct performance reviews with the employee 30, 60 and 90 days after their start date.

By doing so, you ensure the employee gets the early direction, feedback, coaching and development they need to succeed — and to become high performing in their new role.

These interim reviews help the new employee know how they're doing, and flag any potential performance gaps early, so you can address them earlier than later.

30-, 60-, and 90-day reviews also provide the ideal opportunity for the manager and employee to progressively set goals and development plans, adjusting them as the employee becomes more proficient and productive in their role.

It's important to remember that the focus of these meetings shouldn't on rating the employee's performance. The focus should be on assessing the employee's progress in their new role, and making sure they receive all the help and support that they need to get up to speed quickly.

Regularly scheduled reviews also help to drive greater manager and employee engagement right from the start, by encouraging ongoing, two-way dialogue about expectations, performance and development.

You know what they say... good habits start early!

Start the ongoing, two-way dialogue about expectations, performance and development

Effective onboarding using the Halogen TalentSpace™ suite

So how do you implement these five onboarding best practices and ensure everyone in your organization follows them? The Halogen TalentSpace™ suite can help.

Let's take a look at how.



Extend onboarding activities beyond the initial three months



Communicate role expectations up-front



Invite the employee to communicate his or her value and to contribute early on



Integrate learning into the onboarding process



Set the employee up for success with 30-, 60-, and 90-day reviews





Best practice #1

Extending new hire activities beyond the initial three months

With Halogen Performance™, the Halogen TalentSpace suite's performance management module, you can create all the forms and processes you want and need, exactly the way you want.

Easily create an automated, customized onboarding process that includes the steps you want, and that extends as long as you need. Like this one:

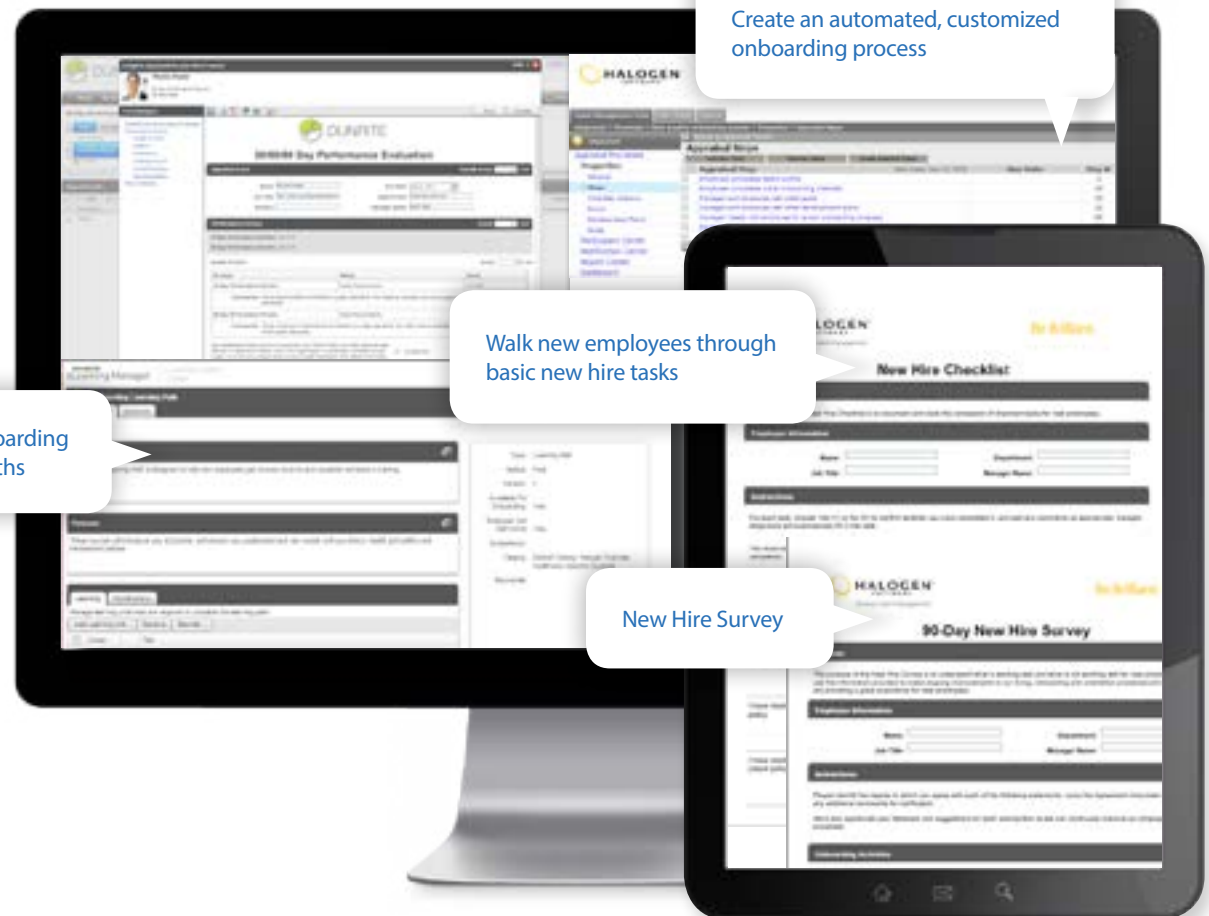
It's easy to create an onboarding workflow that includes activities for the manager and employee throughout the employee's first year.

Create comprehensive onboarding checklists that walk new employees through basic new hire tasks and ensure they're completed. For example:

With Halogen Halogen Learning™, the suite's Learning Management System (LMS), you can easily create onboarding learning paths and automatically assign them to employees when they're hired, ensuring they get off to a great start.

And you can create cumulative 30-, 60-, 90-day review processes and forms.

Halogen Performance even comes complete with an Employee lifecycle form pack that includes a new hire checklist and a survey you can use as is, or modify to suit your needs.





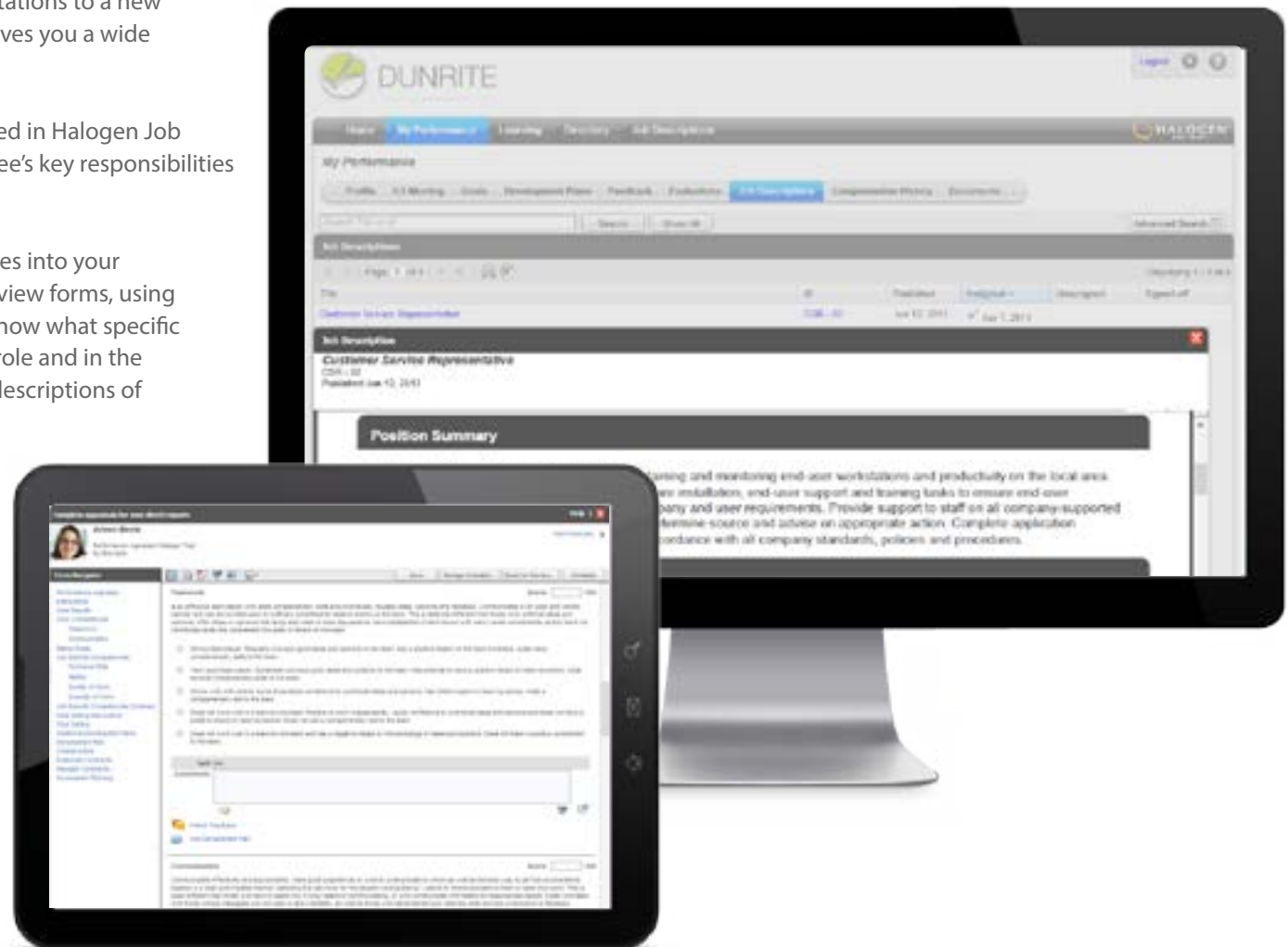
Best practice #2

Communicating role expectations

When it comes to communicating role expectations to a new employee, the Halogen TalentSpace™ suite gives you a wide variety of tools.

Start with a job description, built and managed in Halogen Job Description Builder™, to describe the employee's key responsibilities and job accountabilities.

Then, build core and job-specific competencies into your annual appraisal forms and 30-, 60-, 90-day review forms, using Halogen Performance™, so new employees know what specific behaviors will make them successful in their role and in the organization. You can even include detailed descriptions of the different levels of proficiency.



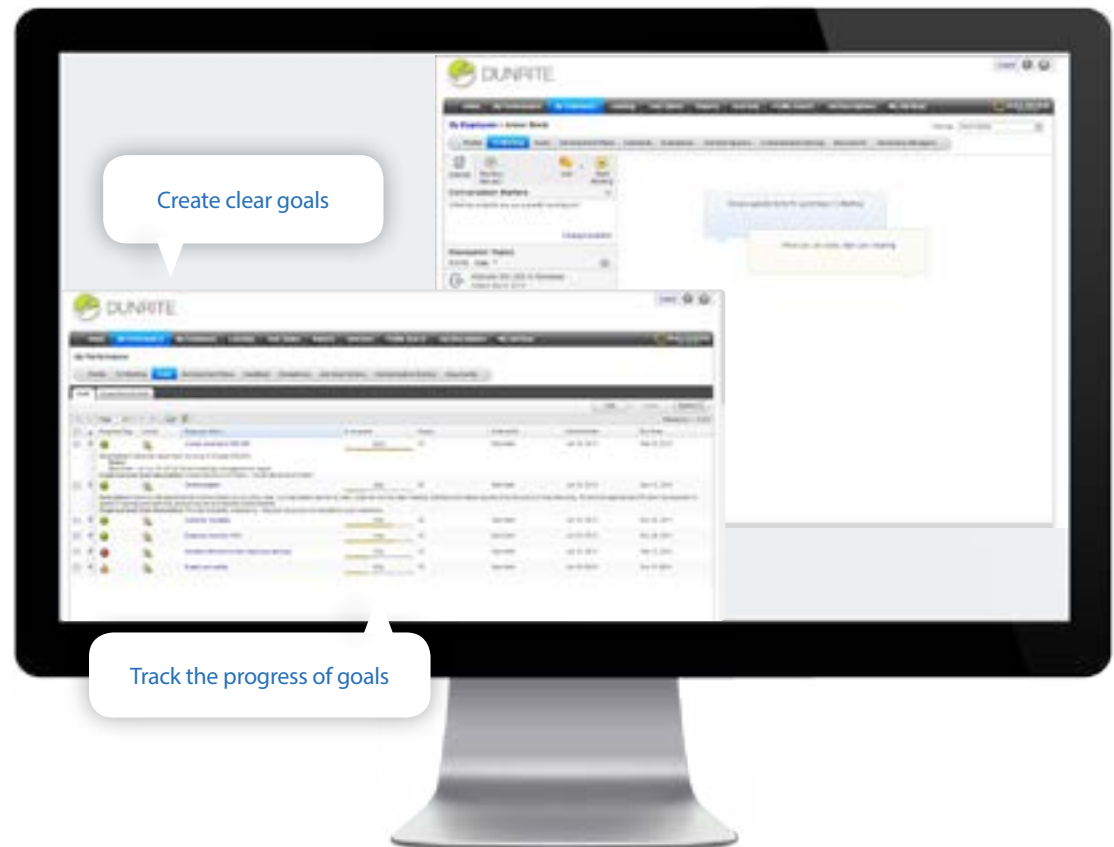
Managers and employees can also use Halogen Performance to collaboratively set clear goals for their new employees and link them to the organizational goals they're designed to support.

This ensures that the employee knows what they're expected to accomplish and has a context for their work. Halogen Performance enables you to create a specific goal setting process for this and include it as a step in your onboarding process. Or, if preferred, managers and employees can set goals as a standalone activity, whenever they need to.

Every employee has fingertip access to all their goals from their Halogen TalentSpace "My Performance" page, and can easily make notes on their progress and status.

To make sure every new employee is clear about what's expected, and is receiving all the ongoing direction, feedback, coaching and development they need, managers can leverage Halogen 1:1 Exchange™, to schedule and facilitate regular one-on-one meetings with their new hires (well, actually all their employees really!).

Halogen 1:1 Exchange conveniently pulls an employee's current feedback, goals and development activities into an automated agenda, so managers and employees can review performance and progress, and make notes and adjustments as needed.





Best practice #3

Inviting the employee to communicate their value and to contribute

One of the ways Halogen Performance lets all employees communicate and share their knowledge skills and experience with others in the organization is through talent profiles.

Halogen Talent Profiles are completely configurable, so you gather the information that's important to your organization and your staff. And you can decide who is allowed to view what sections, keeping sensitive information secure.

You can assign new employees a task to create their talent profile as soon as they start.

And because they can easily access their profile from their Halogen TalentSpace home page, they can keep it up-to-date.

New employees can use talent profiles to get to know others in the organization, and to help others get to know them.

Employees can also share some of their expertise with co-workers by giving them feedback, using Halogen Performance Feedback Central™ feature.

It's easy to get a new employee contributing right away by assigning them goals in Halogen Performance.

Managers and employees can collaboratively set goals any time, as part of a dedicated goal setting process, as one of their assigned onboarding tasks, or as part of their 30-, 60-, 90-day reviews — whatever works best for the organization.

The new employee can make notes on their progress and share them with their manager, showcasing their contributions to the organization.

And the manager and employee can review and discuss goals, and set new ones in their regular one-on-one meetings.





Best practice #4

Integrating learning into the onboarding process

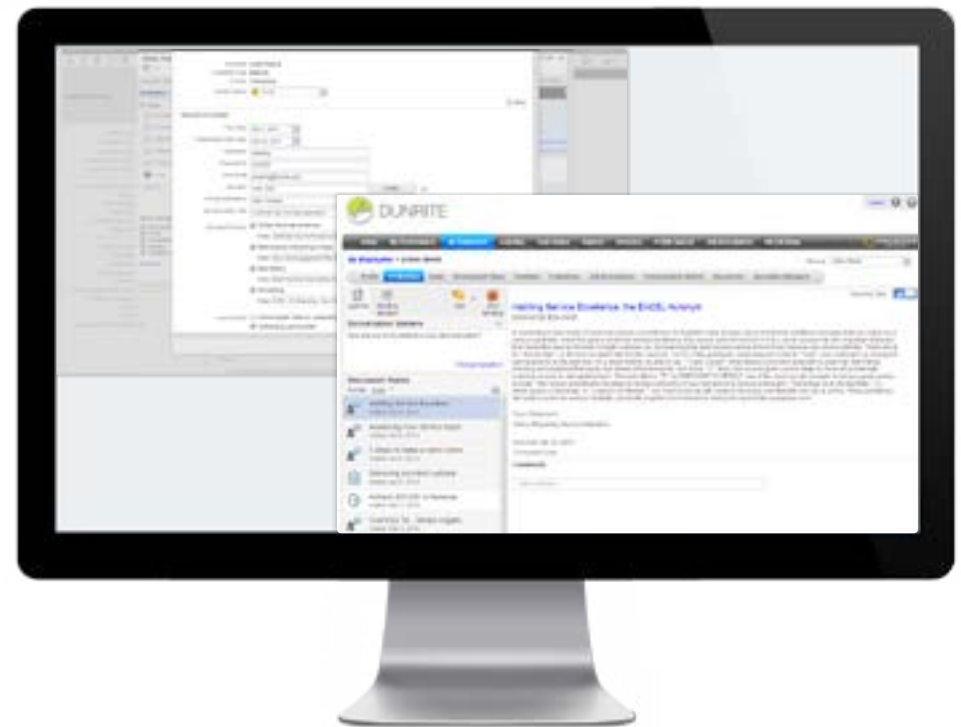
If you're using Halogen Talent Acquisition™, our suite's recruitment module, and Halogen Learning™, you can easily assign new hires an onboarding development plan when you're completing your hiring tasks, simply by clicking a checkbox.

When the employee signs into to your Halogen TalentSpace suite for the first time, they'll see a task to complete their onboarding learning activities, right on their home page.

If you're also using Halogen 1:1 Exchange™ to facilitate one-on-one meetings between managers and staff, the new employee's development plans and activities are automatically added to the meeting agenda. This prompts managers and employees to review, discuss and update development plans and activities when they meet.

They can also add and update development plans and learning activities any time in the Halogen TalentSpace suite.

Plus, in their 30-, 60-, and 90-day reviews, they can identify learning needs related to the demonstration of core and job-specific competencies, and to the performance of goals, and assign development plans and activities as needed.





Best practice #5

Conducting 30-, 60- and 90-day reviews

Because Halogen Performance is so flexible, you can configure any kind of performance management process you want and need, including 30-, 60-, 90-day cumulative reviews. You can even change or extend the review intervals as needed.

The manager and new employee can use these reviews to chart the employee's progress to high performance and productivity in their new role.

The automated process prompts everyone to complete upcoming tasks.

Both the manager and employee can access the goals and development plans set in these reviews from their Halogen TalentSpace home page any time.



Effective onboarding in practice

**EMQ FamiliesFirst****EMQ FamiliesFirst**[Read the full EMQ FamiliesFirst story»](#)

EMQ FamiliesFirst is California's largest and most comprehensive social service agency for children and families. The agency covers 17 counties in California, serves more than 18 000 children and families annually, and has more than 1 300 employees.

With the deployment of Halogen Software's award-winning talent management suite, including Halogen Performance™ and Halogen Learning™, EMQ FamiliesFirst has become a more agile organization that is better able to respond to client needs. They now have:

- Increased feedback from new employees understanding their role in the organization.
- Faster onboarding and connections to work teams.
- Tighter integration of learning with performance; training now supports individual performance and development needs.
- The ability to provide on-demand training to support immediate learning needs.

Employees now see how their learning activities support their performance and positively impact their clients

While training is a top priority for EMQ FamiliesFirst to meet both regulatory and employee development requirements, the organization needed to improve the way they delivered training so employees reaped the benefits without sacrificing time from their primary mission — working with children and families in crisis.

Sheryl Dagang, Manager, Learning & Development for EMQ FamiliesFirst, remembers the agency's former orientation practices. Orientation at the organization used to be one long day, learning human resources rules and signing forms. Dagang recalls, "I think a lot of us have experienced that kind of orientation, where you feel like you're training to do something, but you're not sure exactly what that is or where it fits into the bigger picture for your job." After orientation, new EMQ FamiliesFirst employees then entered an on-boarding curriculum. A general disconnect from the rest of the workforce existed because employees were "away" for their first month, being inundated with compliance courses.

"Our training team needed to deliver value-added learning opportunities for employees to help them meet the challenges they face working with children and families in the field," explained Dagang.

Since rolling out the solution, the EMQ FamiliesFirst team has successfully integrated performance and learning, and the program has been a high-profile success within the organization.

For EMQ FamiliesFirst the tight integration of learning with performance makes training relevant to employees; they now see how their learning activities support their performance and positively impact their clients. The end result is an organization that is better able to respond to client needs and help more children and families in crisis.

Effective onboarding in practice



Fairbanks Hospital



[Read the full Fairbanks Hospital story»](#)

Fairbanks Hospital, the oldest independent alcohol and drug treatment center in America, relies on the Halogen TalentSpace™ suite to ensure it stays competitive when attracting and retaining specialized talent.

In the not-for-profit healthcare industry, demand for skilled professionals to deliver a wide range of services is an ongoing competitive challenge.

To ensure the organization would be able to attract and retain talent over the long term, as well as meet The Joint Commission requirements, Fairbanks overhauled its performance management strategy and process. The senior management team recognized it needed a system that would enable them to implement organization-wide goal management, centered on the goals and mission of the hospital.

By automating their performance management processes using Halogen Performance™, Fairbanks has become more competitive as an employer:

- Employees understand what is expected of them and have clear goals
- Employee turnover is down
- It's easier to attract new employees
- New employees receive job expectations within the first 30 days of hire

The linking of goals to strategic plans was championed by the organization's CEO, Helene Cross. "Fairbanks is the oldest drug and alcohol treatment facility in the U.S. but we're also one of the most innovative," she says. "The Halogen suite makes it clear what people are expected to achieve."

The organization has benefited in a number of other key areas.

Employee morale is noticeably improved. Now, people know what's expected, and expect and appreciate their reviews. "Overall, our retention efforts are vastly enhanced because we're always looking at helping to develop staff," says Fairbanks HR Manager, Andrea Resnik.

"Overall, our retention efforts are vastly enhanced because we're always looking at helping to develop staff."

It's also helped with recruitment. Prospective and new hires are impressed when they learn about Fairbanks' appraisal process. The treatment center is using Halogen Performance for onboarding over a 30- to 90-day period when new employees join, and there is a custom-tailored onboarding approach for nurses and clinicians joining the staff. Talent management tasks are streamlined by eliminating paper. They're also realizing costs savings in terms of reduced "man hours" formerly spent on the manual process.

Effective onboarding in practice



Innovation Place



[Read the Innovation Place story»](#)

Established in 1980, Innovation Place is a Saskatchewan Crown corporation that develops and operates science and technology parks throughout the province.

Innovation Place fulfills its mission to support the growth and success of Saskatchewan's technology sector by providing clients with a superior working environment that contributes directly to their success. The corporation's vision that, "Saskatchewan's technology parks will be the best in the world," is intended to inspire its employees towards excellence in their everyday work and it is intended to act as a lens through which they make decisions.

When Innovation Place decided it was time to take its work planning and performance management processes to the next level, the HR team turned to Halogen's Continuous Advancement Services for expert help and advice.

Halogen's Continuous Advancement Services are designed to help companies who are already using Halogen solutions further refine, improve and mature their talent management processes for maximum business results.

One of the things they wanted to do was implement a separate onboarding process.

With help from a Halogen consultant, they formalized a goal setting exercise for new hires that ensures that their foundation with the organization is started off properly. This allows new hires to get a clear picture of expectations/responsibilities prior to their annual evaluation.

Goal setting and work planning (and coaching) for new hires are now more effective and relevant. New employees become familiar with and are "onboarded" into the Innovation Place culture in a more timely fashion, enabling them to feel like valued contributors to the organization, sooner.

Key questions for your organization



What is the goal of your current onboarding process? Are you achieving it? Should you change/alter it?



Which of the best practices described in this eBook does your organization currently follow?



Which ones should you think of implementing?



Are there any current onboarding tasks or practices you should stop doing?



Are there any lessons you've learned from your own onboarding experiences that you can apply to help improve your organization's current process?



When was the last time you solicited feedback from your employees on the effectiveness and value of your onboarding program? Have you considered their suggestions and made improvements as a result?



How could you measure the business impact of adopting better onboarding practices?

Onboarding resources

Here are a few resources to help you learn more about onboarding best practices and implement them in your organization:



To learn more about how to excel at communicating role requirements and expectations, visit the [Learn](#) section of our website.



You'll find "How To" articles, webinars, whitepapers, forms and templates, and more.



And become a regular reader of our [TalentSpace blog](#).



Template: [7 steps to effectively onboard a new employee](#)



Template: [Onboarding checklist — HR](#)



Template: [Onboarding checklist — manager](#)



Template: [Onboarding checklist — employee](#)



Template: [Employee lifecycle form pack — new hire checklist](#)



How to: [Three best practices for successful onboarding in healthcare](#)



How to: [What's Missing from Your Employee Onboarding Checklist?](#)



How to: [First dates and employee orientation and onboarding](#)



Blog Post: [Halogen TalentSpace Blog — Talent Acquisition](#)



How to: [Is Technology Adoption Taking the "Human" Out of Human Resources?](#)

Wrapping it up

We hope you find this resource valuable in your talent management journey. At Halogen, our vision is to help organizations like yours build a world-class workforce that is aligned and engaged, and delivering exceptional results. We know that your people can be a sustainable competitive advantage.

If you'd like to access the latest thinking on each of the talent management facets discussed here, check out Halogen's [TalentSpace Blog](#).

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About Halogen Software

Halogen Software offers an organically built cloud-based talent management suite that reinforces and drives higher employee performance across all talent programs — whether that is recruiting, performance management, learning and development, succession planning or compensation. With over 1,750 customers worldwide, Halogen has been recognized as a market leader by major business analysts and has garnered the highest customer satisfaction ratings in the industry. Halogen Software's powerful, yet simple-to-use solutions, which also include industry-vertical editions, are used by organizations that want to build a world-class workforce that is aligned, inspired and focused on delivering exceptional results.

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