

Onboarding Best Practices that Support Productivity and Retention

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ABSTRACT

Good onboarding practices have been shown to dramatically improve both the productivity and retention of new hires. Poor onboarding, by contrast, can inhibit productivity and lead to low morale among new employees, causing some people to leave an organization after a short period of time. To support productivity and retention, onboarding requires more than a few intensive days of orientation; instead it should be structured as a longer term process that fully integrates new hires into an organization. This article details a four-stage process of onboarding, with common pitfalls to avoid and specific suggestions for onboarding protocols.

KEY ACTION STEPS FOR LEADERS

Assess your organization's current onboarding practices. What information do you provide to new employees and how do you support them during this process? Surveying current employees can help you identify areas for improvement.

Extend onboarding across multiple weeks or months. This can be structured according to the four-stage process recommended in this article.

Ensure that new hires have a clear place to go for information and questions. Consider implementing a mentorship program for this purpose, as well as to provide new hires with a strong connection within the organization.

Set concrete goals that will hold your organization accountable to these best practices.

WHY ONBOARDING MATTERS

Too often, organizations mistake onboarding for an administrative exercise that is focused on setting up payroll and benefits. The most successful and comprehensive onboarding processes, however, go much further. They provide a baseline level of training on the organization's core tools and processes, minimizing the amount of time required for the new hire to [become a productive member](#) of their team. Additionally, they [integrate new hires](#) into the work environment with formal mentorship programs and opportunities to meet and connect with colleagues.

The benefits of proper onboarding are clear. According to [a report by the Brandon Hall Group](#) from 2015, "organizations with a strong onboarding process improve new hire retention by 82% and productivity by over 70%. Companies with weak onboarding programs lose the confidence of their candidates and are more likely to lose these individuals in the first year." Building on the recommendations in that report, this article shares best practices that organizational leaders and managers can implement to ensure successful onboarding of new hires.

THE FOUR STAGES OF GOOD ONBOARDING

To ensure equitable experiences for new employees, onboarding should be treated as an ongoing learning process that engages an employee well into their tenure at an organization. Onboarding can proceed in four stages with the provision of core information about:

1. THE ORGANIZATION'S GOALS AND VALUES

New hires receive information about the organization's goals, values, and external image. This

occurs as part of the recruitment and interview process, and continues through a new hire's first day.

2. THE ORGANIZATION'S POLICIES AND PROCEDURES

New hires learn basic information about policies and legal requirements. This includes payroll, retirement policies, paperwork, and the typical day-one tasks. Sometimes referred to as "pre-boarding," this stage can occur before a new hire starts, potentially as soon as a candidate accepts the job offer. It should not take more than two days in total.

3. THE NEW HIRE'S ROLE AND TEAM

New hires are given clear role expectations and are integrated into the team. This is where a new hire should connect with their supervisor(s). This stage should take place over the course of a new hire's first week at an organization.

4. THE ORGANIZATION'S CULTURE

New hires build relationships and networks within the organization. The organization actively promotes socialization into its culture, starting in a new hire's first week and ideally continuing for at least a few months. A mentorship program can help structure this process.

COMMON PITFALLS IN ONBOARDING AND SUGGESTED SOLUTIONS

Identifying pitfalls in onboarding and correcting them can help organizational leaders fill gaps in the onboarding process.

PITFALL #1: Onboarding is delayed and not prioritized.

If the onboarding process is not started soon after a new hire has accepted an offer for employment, new



hires can start to feel adrift and undervalued. This is not just about the timing of the onboarding. It is also important to give these new employees ample time to complete their initial tasks, with follow-up so that they feel supported.

Create a “pre-boarding” process where employees are given necessary paperwork, assigned a human resources or people operations representative, and receive a “Day One How-To” document (where to park, how to dress, what to bring, etc). Additionally, give new hires an overview of the onboarding process that includes an outline of all trainings they will be attending and a preview of their first few weeks. Assign new hires a designated “onboarding buddy,” whether that is another member on their team or their supervisor. This can be seen as part of a longer term mentorship program discussed further below.

PITFALL #2: New hires are overwhelmed with too much information in a short period of time.

A common practice is to pack in as much information as possible into the first few days. This can cause new employees to feel overwhelmed. Most employees will not retain all the information they are given during onboarding, so it is important to provide easy-to-access reference materials for critical information. The “onboarding buddy” suggested above and/or connection to a supervisor will also provide another resource to help new hires process so much new information. A “New Employee Fact Sheet” can help new hires find answers to basic organizational policy questions.

PITFALL #3: New hires do not have clarity about their role or what is expected of them.

If an employee doesn’t have a clear understanding of their role, both from the organization at large and directly from their supervisor, they will most likely flounder or be unable to track their success. A quote from an employee at one of EBDI’s client-partners illustrates this problem well:

“I’ve definitely seen staff who are new [and] are just given all the things that you have to do, and they’re kind of learning as they go. You can imagine the feeling of inadequacy as you’re learning, gaining all this context and still are expected to perform at this level of excellence that [the organization] has.”

To address this issue, managers should sit down with employees and come to an agreement on concrete goals, deadlines, and general expectations. This is a critical part of stage 3 of the onboarding process. Examples of concrete goals might be:

- *“Get comfortable with required organizational software/applications by the end of month.”*
- *“Meet each team member for coffee during the first two weeks.”*
- *“Complete all required internal training during the first week.”*
- *“Lead a team meeting within the second month of employment.”*

Setting these goals with new hires is also a way to give them a voice in the process, kicking off the feedback channel discussed next.



PITFALL #4: There is no feedback channel or follow-up with the new hire.

In many organizations, once onboarding is complete, there is no follow-up with employees to track their journey. Additionally, employees are not made aware of processes or resources they can go to get further aid.

“We have a lot of systems at [my employer], like Asana, Slack, [and] budget trackers...that we use to keep track of data. I felt very unwelcome in [those systems]. It didn’t feel like it was covered well in onboarding. It felt like it was very much like just go figure it out. And it was hard to know at what point have I passed where I should have already understood this and it’s now not okay for me to ask questions of other people.”

As illustrated in the above quote, employees not only can feel intimidated by the new systems or protocols they are expected to learn, they are often not given a timeline for learning those systems. To avoid this problem, managers should set checkpoints with employees to track their transition into the organization. This allows for opportunities to recognize successes, address any issues collaboratively, and set expectations for further training that may be required. This begins in stage 3 and is ongoing through stage 4.

PITFALL #5: Expectations and standards are not clearly shared with new employees.

Every organization has its own method of tackling asks and ensuring quality, but if these processes and methods are not clearly defined for new employees, then new employees are being set up for failure. The following quote illustrates how not giving employees clear protocols and standards can begin to degrade morale.

“So I spent like all my time getting [my first project] done. And then it was met with like, ‘Oh, this is not how we write.’ But they never taught me about like, okay, everything has to be [this font, this font size] in this format using this typical type of language. Here’s where the boiler plate language is to craft these messages. So I had to start all over again.”

Issues such as this can be avoided by creating a handbook or resource that comprehensively outlines standard processes within the organization. Make sure it provides clear and definitive guidelines when possible—examples are even better! Give new employees time to review this resource. This would ideally start during stage 2.

In addition to the handbook, managers should communicate directly about how an individual’s performance will be measured. What, if any, corporate success measures will there be and how will they contribute to bonus and promotion criteria? What is expected during their first week? Their first month? Their first quarter? This kind of transparency is a critical part of fostering equity within an organization.

MENTORSHIP PROGRAM BEST PRACTICES

Mentorship is a key part of the onboarding process, particularly stage 4. But without clear standards or accountability, a mentorship program is susceptible to some of the same pitfalls as onboarding generally. Therefore, organizations should set clear standards of practice around mentorship so that it is not driven solely by the mentor/mentee relationship. By establishing a mentorship program as an official part of onboarding, the organization will hold mentors accountable to their mentees.



Suggestions for program design include:

- *Mentors should be given guidance and training on how to engage in relationships with their mentees, what resources are available, and how to support mentees.*
- *Mentorship programs should be managed by human resources, people operations, or another overarching team.*
- *Mentorship programs can have a set timeline of one to two years, with meetings once a month or more in the beginning and decreasing in frequency over time.*
- *Mentees should have a process to provide feedback about their experiences with their mentors.*

SUMMARY OF ONBOARDING BEST PRACTICES

Good onboarding means providing new hires with the resources they need to succeed at every step of the way. Use a **staged, integrative process of onboarding**, with goals, timelines, and clear markers of progress. This process should begin before a new hire starts and continue several months into their tenure. Create written guides, a feedback channel, and, if possible, a formalized mentorship program so that **new employees have multiple points-of-contact** to pursue questions or concerns. Finally, to ensure that these actions are collectively working as they should, **measure the success of the total onboarding process** using metrics and feedback gathered from employees, and **iterate accordingly**. All of these actions will not only help a new hire successfully integrate, they are also best practices for promoting equity and inclusion within an organization.

AUTHOR BIOGRAPHY

Neha Sharma is a consultant with EBDI who has supported several engagements with nonprofit client-partners. When not working with EBDI, Neha is a business and technology integration manager at Accenture Federal Services where she led the LGBTQ Employee Resource Group out of the Boston office for multiple years. Neha holds a Bachelor of Science in Mechanical Engineering from Boston University. Her hobbies include convincing friends to watch horror movies, discussing the hot new show on Netflix, painting anime characters for her friends and family, and finding new puzzles to solve.

