

Successful Onboarding Toolkit

Everything you need to know for powerful onboarding

Redline

Group Ltd

Enabling high-technology companies to build world-class teams

• Contract • Permanent • Executive



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Now includes new [onboarding checklist](#)

All Aboard: Enhancing your onboarding process

Onboarding is a critical part of the talent lifecycle, with disengaged employees costing the UK economy £340 billion.

69%

Research indicates that new hires enrolled in a well-structured onboarding orientation program are 69% more inclined to stay with the company for up to three years.

A robust onboarding scheme not only bridges the gap between the organisation and its new members but also serves as a catalyst for bolstering employee satisfaction. Surveys show that over 93% of employers recognise the critical role of onboarding in influencing an employee's decision to either remain with or depart from the company.

Onboarding embodies the process of ensuring that new employees are thoroughly equipped with the requisite knowledge and skills to seamlessly integrate into the business.

To support your success, we've assembled this extensive onboarding toolkit, complete with essential resources tailored for each stage of your new hire journey.

Why is onboarding important?



of companies have no formal onboarding process



increase in work performance if a thorough onboarding process is in place



of new employees leave after a disastrous first few weeks



of new hires start looking for a new job within six months

01

Preboarding

Undoubtedly crucial yet frequently underestimated, preboarding sets the stage for the complete onboarding journey. It serves as the initial introduction, not only amplifying new hires' anticipation but also laying the foundation for meaningful relationship even before their official start date.

02

First Day Experience

Forge an unforgettable first impression by orchestrating an interactive and enjoyable inaugural day. A well-structured agenda ensures a blend of information and engagement, setting the tone for a productive journey ahead.

03

First Month Essentials

Now you've covered the fundamentals, it's imperative to provide new employees with a comprehensive overview and additional insights. This phase serves as a refresher whilst equipping them with essential knowledge for ongoing success.

04

First Quarter Tools

The initial 90 days mark a pivotal period in shaping a new employee's trajectory within the organisation. It's during this phase that the new hire's manager assumes a more prominent role in guiding their onboarding journey, laying the groundwork for sustained growth and development.

05

Measure Success

In an ever-evolving business landscape, adaptability is key to the efficacy of your onboarding process. Regular feedback mechanisms serve as invaluable tools for gauging success and refining your program to meet evolving needs. If you cannot measure it, you cannot manage it.

A survey conducted by TeamStage found that only 12% of employees feeling satisfied with their organisation's onboarding efforts.

01. Preboarding: Before the first day

The true significance of preboarding lies in maintaining candidate engagement and interest, ensuring they eagerly step through the door on their first day, ready to embrace their new role rather than contemplate an exit strategy.

Preboarding constitutes a vital subset of the onboarding process, spanning from offer acceptance to the new employee's first day. It represents a pivotal stage in the onboarding journey, capable of significantly enhancing new hires' readiness for their upcoming responsibilities. Consider the essentials your new employee requires from your organisation; fundamental knowledge, confidence, access to supporting resources, and seamless cultural integration.

30%

Alarming, over 30% of new hires are already searching for a new job in their first weeks, or even worse, not showing up for the first day at all.

Preboarding checklist

- 1 Personalised Welcome Email:** Craft a bespoke welcome email containing necessary documentation for completion/return, instructions on what to bring in (e.g. passport/P45 or HRMC new-starter check list) and a detailed first-day agenda.
- 2 First-Day Agenda:** Outline the start time, reporting structure, location/map, entry instructions, team member information, dress code guidelines, lunch arrangements for the inaugural day.
- 3 Technology and Equipment Setup:** Identify the new hires' technology preferences and necessary equipment set-up. Ensure their workspace is prepared with equipped stationery, with systems and I.T. infrastructure ready for their start date.
- 4 Manager's First-Day Schedule:** Managers should curate a tailored schedule for the new employee, sending out calendar invites for introductions, meetings and initial tasks.
- 5 First Week Schedule:** Provide clarity on the first week's schedule, without overwhelming the new hire by sending it directly. Instead, offer a structured plan to organise their tasks and commitments.
- 6 Personalised Welcome Pack:** Assemble a personalised welcome pack encompassing a company overview, login credentials, passwords, security protocols, details of office facilities and break areas, as well as emergency information.
- 7 Office Buddy:** Assign a designated team member as the new employee's buddy to provide support and guidance, fostering a sense of camaraderie on the first day.
- 8 Social Integration:** Inform the new hire about upcoming company events and informal social gatherings, such as 5-a-side football matches or after-work drinks, enabling them to proactively engage with their colleagues and integrate into the social fabric of the workspace.

02. First Day Experience: First Impressions Count

The statistics are clear: 4% of new employees leave after a disastrous first day and staggering 30% said farewell within six months. Yet, a well-executed onboarding process can enhance a company's retention rate by an impressive 82%. Successful preboarding lays the groundwork to mitigate common factors contributing to these concerns. The first day offers a glimpse into the company's culture and work environment, making it imperative for managers to ensure each new employee experiences a seamless and positive start.

Here are a few tips to elevate your onboarding process and ensure your new employee's first day is exceptional.

1 Start Time **09.30 am**

Commence the day later than usual business hours to allow time for other staff to settle in and organise their time effectively.

5 Job Role **14.00 pm**

Orient the new employee on their role, responsibilities, and performance expectations, including how they will be assessed throughout their probation period.

2 Office Tour **10.00 am**

Introduce the employee to their colleagues and management while conducting a tour of work areas, break rooms, emergency exits, and other pertinent facilities.

6 System Access **15.00 pm**

Introduce core business systems such as telephony/comms, internet, intranet, database, and email systems, allowing the new employee sufficient time to familiarise themselves with the software.

3 Agenda **11.00 am**

Provide clarity on the schedule for their first week and establish who they should report to for various tasks and queries.

7 Assign Task **17.00 pm**

Challenge the new employee with a task that is both meaningful and achievable, setting clear expectations for completion to demonstrate your support and assess their abilities.

4 Lunch Plan **12.00 pm**

Take the new employee out for lunch to facilitate socialisation and integration into the company's culture.

8 End of day one **18.00 pm**

Conclude the day by soliciting feedback on their experience and gauging their initial impressions of working at the company thus far.

Remember, no one likes to eat alone!

03. First Month Essentials: Training to Increase Productivity and Performance

During the initial month, it's paramount for the new employee to start feeling acclimatised to the role and responsibilities.

Your primary focus should revolve around ensuring that new employees have the necessary resources, their queries are addressed promptly, and they don't feel overwhelmed or adrift. Your efforts should be dedicated to facilitating their seamless integration into the company's culture, ethos, and overall environment.

86%

Industry statistics highlight a critical timeframe: within the first six months of joining a new company, more than 86% of all new hires make the pivotal decision of whether to stay.



Offer a comprehensive list of learning materials alongside a training manual.



Support the development of knowledge foundation and skills.



Ensure all required training is conducted and thoroughly reviewed.



Establish measurable career goals for the upcoming six months.



Schedule refresher training sessions covering topics learned in the initial weeks.



Develop a career development plan outlining specific objectives and metrics.



Conduct weekly 1:1s to assess progress and solicit feedback.



Provide a detailed tour of the performance management system.



Ask targeted questions

- What are their goals and aspirations?
- Do they perceive progress in their role?
- Is there a process they would alter?



Provide continuous training

- Is external training an option?
- How can productivity be boosted?
- Are they effectively integrated into their team?



Acknowledge achievements

- Have they attained any milestones?
- Have you recognised their accomplishments?
- Are incentives being offered?

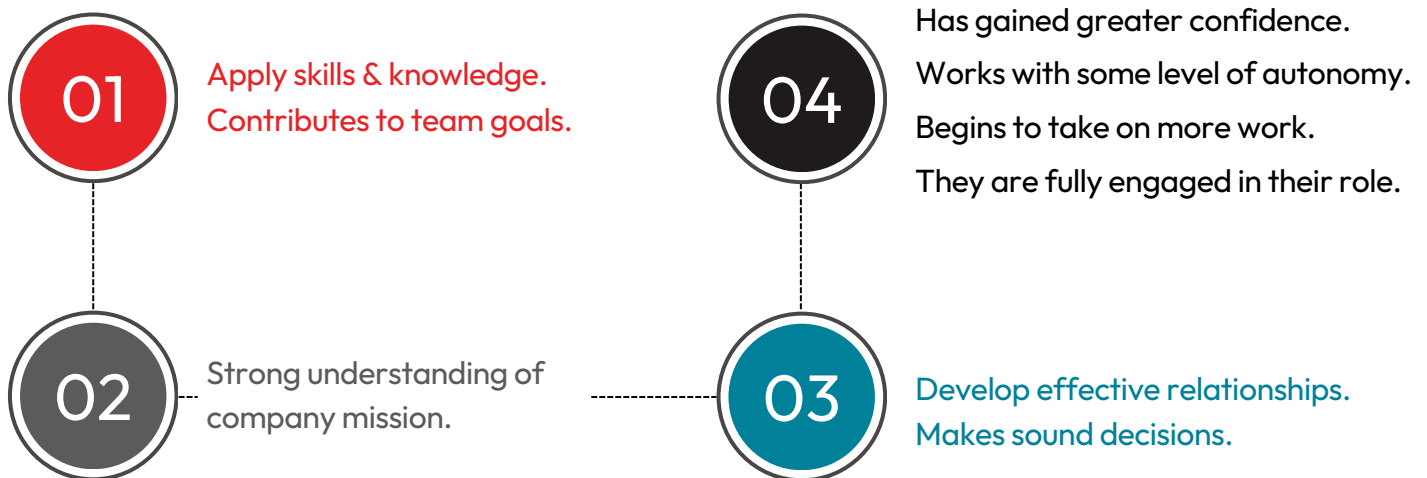
04. First Quarter Tools: Give New Employees The Best Start

Research indicates that new hires engaged in a robust onboarding program are 69% more inclined to stay at a company for up to three years. A significant 22% of employee turnover transpires within the first six months. Notably, 23% of employees departing within this timeframe express that clear delineation of responsibilities could have bolstered their retention. Your new employee is gaining traction, delivering on tasks, taking initiatives on projects, and fostering relationships with peers as trusted collaborators.

How are you assessing your employee's progress after working for the business for three months?



Your new employee is actively involved in their role and should demonstrate the following competencies before progressing in their career:

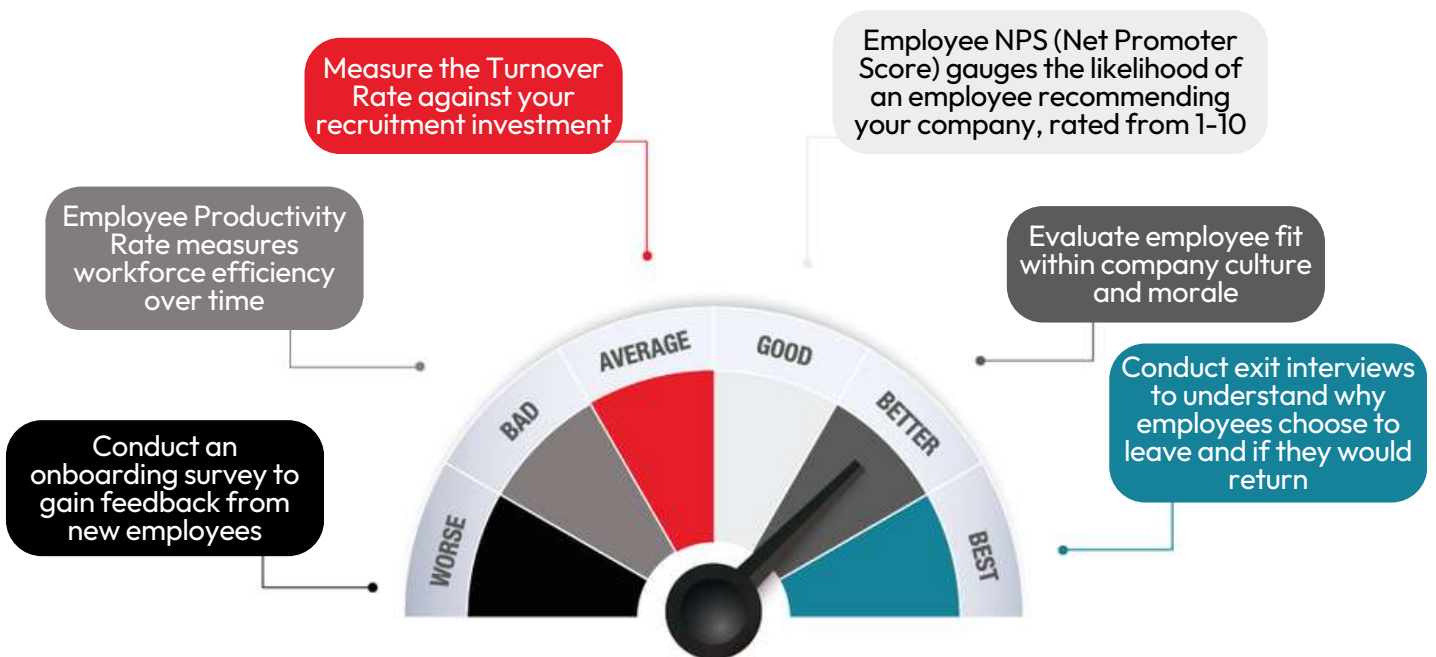


05. Measure Success: Drive Positive Business Outcomes

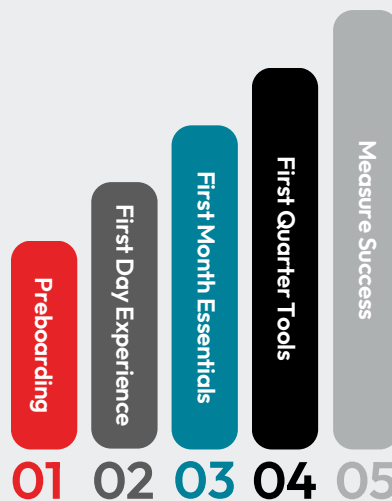
The primary objective of onboarding is to integrate, empower, and align employees for success. Its impact resonates across the entire employee journey – from the initial contact to the final touchpoint. We must evaluate strategic onboarding initiatives and their capacity to generate favourable business results.

This approach enables you to unearth valuable insights into the employee experience, assessing whether individuals are equipped with the knowledge and resources essential for future success within your organisation.

Enhance Onboarding Practices:



[Customisable onboarding checklist](#) A tailored solution to streamline the myriad tasks essential for a successful onboarding process.



Reference List

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