

A warm, orange-toned photograph of three people in an office setting. On the left, a man with dark curly hair, seen from the back, is shaking hands with a man on the right who has a beard and is smiling. A woman stands between them, also smiling. They are in front of a large window with multiple panes. In the foreground, a desk with a laptop and a coffee cup is partially visible.

# Onboarding Toolkit

Everything you need to optimize  
your onboarding program

 Paycor®

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# Onboarding Fundamentals

## SO MUCH MORE THAN JUST PAPERWORK

While filling out W-4s and signing up for a benefits program are a necessary component of any new hire process, onboarding involves much more than filling out paperwork. Employee onboarding introduces new hires to the values, cultural aspects and people of the company.

Onboarding has four distinct levels. Here's an excellent summary by Tayla N. Bauer, for SHRM:

### COMPLIANCE

Compliance is the lowest level and includes teaching employees basic legal and policy-related rules and regulations.

### CLARIFICATION

Clarification refers to ensuring that employees understand their new jobs and all related expectations.

### CULTURE

Culture is a broad category that includes providing employees with a sense of organizational norms, both formal and informal.

### CONNECTION

Connection refers to the vital interpersonal relationships and information networks that new employees must establish.

This process can be structured or a little more free-flowing, but it typically involves the new employee completing required training, depending on the role; becoming familiar with office policies; and getting comfortable with the work environment and office itself. It's an opportunity for the new hire to get comfortable in their new role, understand what impact the role has on the business and learn what behaviors are expected. Keep in mind, however, the onboarding process is not a "one-and-done" process. A complete onboarding experience should last at least a year to help ensure high retention.



## Why is Onboarding Important?

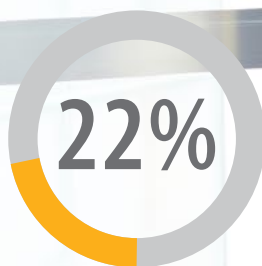
New employees decide whether they feel at home or not in the first three weeks in a company. The consequences of a weak onboarding experience range from employee poor performance and dissatisfaction, active disengagement and, eventually, to turnover. According to Bersin research, 4% of new employees leave a job after only one day, and 22% of staff turnover occurs within the first 45 days of employment. So, much like “location, location, location” is important in the real estate industry, “retention, retention, retention” is key in the hiring and talent management space. Companies spend an enormous amount of money, time and resources to find the perfect person for every role, and it shouldn’t go to waste.

In fact, the entire first year with a new employee is a critical phase when it comes to engagement. Companies with an engaging onboarding program retained 91% of their first-year workers, and 58% of new employees are likely to stay at a company for three years or more if they had a great onboarding experience (The Wynhurst Group 2007). Sadly, though, only 12% of employees strongly agree that their employers do a great job with onboarding (Gallup, Inc. 2017). So, first impressions definitely matter.



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*Bersin*



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# The ONE THING that Gets in the Way of Onboarding

The number #1 onboarding mistake that organizations make is that HR and frontline managers can get bogged down with administrative tasks that take them away from focusing on the more important matters. According to the Center for Effective Organizations, tedious transaction tasks like administering employee benefit plans, processing payroll, and responding to employee questions take up over 73% of an HR professional's time.

Onboarding can quickly and easily become nothing more than managing administrative details that, while important, are not the kinds of things that make employees stay and be productive.

**For example, if you're not automating onboarding, this can happen to the new hire as well as HR:**

- Days spent in an office filling out paperwork versus meeting the team and spending time learning their role
- Paperwork creating inefficiencies
- Time spent tracking down information
- Re-keying information into multiple systems
- Confusing first impression of the new organization because there's no coherent look, tone and feel to the process

Bottom line, managers and HR shouldn't get caught up in the administrative details. As much as possible, everything that can be automated should be automated so everyone can focus on the crucial, important business at hand instead of tasks. Ideally, new hires can enjoy their new hire experience by having paperwork and necessary training completed before their official start date.





# Your Complete Pre-Boarding and First Day Checklist

Before your new hire's first day, your onboarding tool should capture all of this essential information and store securely in the cloud:

## PRE-BOARDING

- ☐ Onboarding tool automatically sends welcome message
- ☐ New hire completes this information through onboarding tool:
  - o Personal info
  - o Contact info
  - o W-4
  - o I-9
  - o Direct deposit form
- ☐ New hire acknowledges key policies:
  - o Handbook or manual
  - o Dress code policy
  - o Non-disclosure agreement
- ☐ Onboarding tool provides detail to create employee record in the system

## DAY ONE

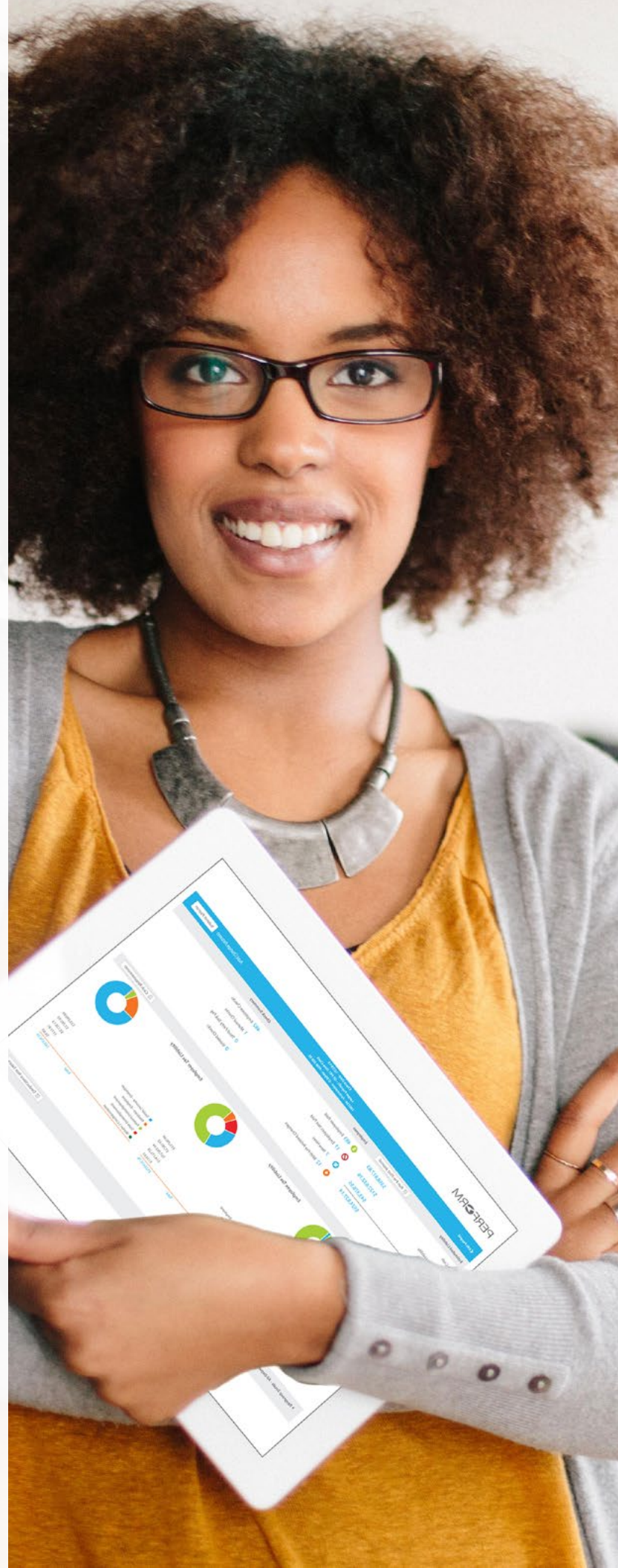
- ☐ Welcome
  - o Email or voice mail from hiring manager and/or team members
  - o Include link to video clips from the new hire portal
  - o Welcome card from peers
- ☐ Welcome basket
  - o Company logo gear
  - o Org chart with position descriptions
  - o General phone directory
  - o Phone directory of key contacts and position descriptions
  - o Links to key information on company website and new hire portal





## DAY ONE

- ☐ **Key schedules**
  - o Payday
  - o Expense reports due
  - o Training report due
  - o Weekly sales activity report due
  - o Weekly forecast due
  - o Territory development plan due
- ☐ **FAQs**
- ☐ **Technology and logistical set up**
  - o Parking pass
  - o Phone extension
  - o Work space
  - o Business cards
  - o Card key
  - o Cell phone
  - o Laptop
  - o Computer login
  - o Resource center login and password
  - o Credit card
  - o Email address
  - o Office key
- ☐ **Office supplies provided**
  - o Paper
  - o Paper Clips
  - o Pens
  - o Stapler
  - o (other):
- ☐ **Introducing new hire**
  - o Email announcing new hire
  - o Internal social media posting
- ☐ **“Set up for success” preparation by hiring manager**
  - o Review job requirements
  - o Identify high-value activities
- ☐ **Review hiring manager checklist**
- ☐ **Assign mentor or buddy**
- ☐ **Set dates for orientation and learning programs**







## Your Complete 90-Day Checklist

### THE FIRST 90 DAYS

In general, here are some guiding principles that employers should make a priority during the first three months of a new hire's employment:

- Provide position-specific training as well as cross-training if possible. The more your new employee knows, the more useful she will be to your company.
- Carefully monitor job performance, and provide constructive feedback where appropriate.
- Schedule regular check-ins, soliciting feedback regarding observations about your business policies and procedures.
- Monitor the effectiveness of the employee you assigned as a mentor or buddy, providing guidance as needed to that employee.

More specifically, here's what each phase looks like:







## What Happens After 90 Days?

### 10 WAYS TO TAKE ONBOARDING TO THE NEXT LEVEL.

Even when the first 90 days conclude, it's important to maintain communication to emphasize that you are invested in your employee's future. Listen to concerns, and when new interests are expressed, create a plan to incorporate them into the employee's current responsibilities in a way that has a positive impact on the company's goals.

#### 10 things to think about when planning onboarding beyond the first 90 days:

1. Encourage your employee to seek additional role-specific professional development opportunities.
2. Continue a mentor program for the employee, and encourage the employee to serve as a buddy for more recently hired team members.
3. Send your new employee to relevant industry-related events and conferences.
4. Make sure the employee is working on internal cross-functional projects to get people from across the organization working together.
5. Where appropriate, encourage cross-departmental training.
6. Schedule weekly or bi-weekly touchbases.
7. Conduct mid-year and annual performance evaluations.
8. Request formal feedback of the employee's performance from her co-workers.
9. Assign stretch goals.
10. Be sure to publicly recognize the employee for successes and achievements.



# The Holy Grail of Onboarding: Building a Culture

Culture can make or break a company. According to a Bain & Company Survey of more than 350 companies in Europe, Asia and North America, 81% that a company lacking a high-performance culture is doomed to mediocrity. Unfortunately, fewer than 10% succeed in building one. The holy grail of onboarding occurs when you have all your bases covered, so you can begin to focus on acculturation – building a true sense of community & team.

## Ways to build culture:

1. Implement buddy systems
2. Host team lunches and potlucks
3. Provide learning opportunities... job related and non.
4. Have periodic team outings (sporting events, amusement parks, bowling or laser tag)
5. Celebrate team successes. Take them out to dinner or happy hour.
6. Hold contests and drawings for company merchandise, gift certificates and other prizes.
7. Have fun. Create an environment where people love to do the work they love and everyone benefits.
8. Cut down on meetings. According to a survey conducted by MeetingKing, 37% of employee time is spent in meetings; 70% of meeting attendees bring other work to do during meetings (a sure sign that meetings are wasting time); and 20-50% of meeting time is considered wasted.
9. Where appropriate, encourage flexible work schedules.
10. Participate in a group volunteer project for a local nonprofit organization.
11. COMMUNICATE!
12. Don't buy in to the "busyness" culture. Far too many managers reward team members based on how stressed out they are, or how often they are the last in the office. Everyone doesn't have to be busy all the time.
13. Find team members who complement you. Identify your strengths and weaknesses, then fill in the gaps.

## GOOD LUCK, AND HAPPY ONBOARDING!

Effective onboarding is one of the most important steps you can take to drive retention, engagement, and overall satisfaction across your organization. Spend time to get it right, and you'll be rewarded.

For more advice, tips, and inspiration on onboarding and other HR topics, please visit Paycor's Resource Center.



Call toll free  
1.800.381.0053



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