

SECTION 1: **Attract and Select**

TOOL 1.7: **ONBOARDING**

Purpose	Onboarding is the planned process by which newly appointed employees acquire the necessary company-related knowledge, skills and behaviours to get settled and become productive as soon as possible. Research shows that effective onboarding leads to employees experiencing greater job satisfaction, performing better and staying on longer in the organisation.
Content	This tool includes four sections: 1. Onboarding checklist 2. Draft letter of welcome from the CEO 3. Six-month onboarding programme template 4. Onboarding feedback questionnaire
Application	a. Evaluate your organisation's onboarding processes using the onboarding checklist to identify areas with room for improvement. b. Plan an onboarding programme by customising the generic example to match your company's needs. Introduce a 'buddy' system for all new recruits, including rewarding buddies for their effort and commitment. c. Survey new recruits on the effectiveness of the onboarding programme, using the onboarding/orientation feedback questionnaire.

1. Onboarding checklist

Begin by asking the following 12 questions to assess how well your organisation's onboarding process for new recruits is working:

1. Does the onboarding process begin at the final stages of the selection interviewing process, when some of the new recruit's team members meet in the final interview (hopefully someone among them is the new recruit's future 'buddy')?
2. Are new recruits communicated with and made to feel they were specially selected and do they receive a warm welcome before they arrive for their first work-day?
3. Does the onboarding process inspire in new recruits a sense of pride in having joined the organisation?
4. Are new recruits given a strategic view of the organisation so that they understand the organisation's vision, mission, values and culture right from the start of their tenure?
5. Is there a 'buddy system' in place where an existing staff member assumes the responsibility of playing a supportive role during the new recruit's induction into day-to-day organisational formalities and procedures?
6. Is compelling 'story-telling' an important way to initially communicate the organisation's values, culture and other important qualities?
7. Is the company's orientation programme appropriately focused on the needs of the new recruit, designed and implemented in easy-to-understand modules, interesting in content and interactive in nature?
8. Is the induction programme scheduled at the correct time, i.e., neither too soon nor too late after the new recruit joins the company?
9. Is relevant supporting information readily available to the new recruit on the company intranet or other systems?
10. Is a mentoring programme in place where new recruits can choose (and be accepted by) a mentor to support their longer-term career development within the organisation?
11. Are practical mechanisms in place for new recruits to regularly and easily communicate how they are doing and feeling in their first six months of employment?
12. Are managers committed to the business case and the importance of onboarding new recruits, and in playing their supportive inducting role effectively?

2. Draft letter of welcome from the CEO (customise to your taste and style)

Company letterhead

Dear (Name of new recruit)

A warm welcome to our company. We are very pleased to welcome you on board. We recognise that the first couple of months with us are very important, because there are so many people for you to meet and get to know, and there is so much to learn about the way we go about our business.

This new recruit's "onboarding passport" is designed to help you begin your journey in our company – a journey that will hopefully bring you a rewarding career with us. Onboarding will ensure appropriate support and a smooth transition for you into your job and into our organisation. The benefits you can expect of onboarding include

- clarity regarding our organisation's vision, mission and values;
- a better understanding of and a smooth transition into the culture of our organisation;
- knowledge of our organisation's many systems and processes;
- role clarity, performance expectations, development and career opportunities;
- effective engagement with the organisation, leading to a higher level of job satisfaction and better retention levels in the longer term.

Listed here is key information which you should find most helpful during your first six months with us. This six-month schedule has been divided into four main time blocks for you to use as a guide to completion (Weeks 1, 6, 12 and 26). As you work through the information, please

complete the passport as a way of ensuring that you have covered and passed the key orientation and learning milestones on your journey.

Please direct any questions along the way to your manager, your 'buddy', a colleague, or your HR representative. Your buddy has volunteered to support your induction and inclusion into the organisation. This important person is a colleague (preferably from the same department and location as you) who helps new recruits to settle in, especially during the first 12-week transition period. Your buddy will guide you in understanding day-to-day formalities and procedures, and will act as a 'second port of call' when you require assistance and support, in addition to the vital support your manager gives you. We hope you will volunteer to be a buddy to a new recruit sometime in the future.

We look forward to presenting you with our company desk toy after six months as an important symbol that our relationship has become a mutually beneficial partnership.

Good luck in your new job and have fun working with us!

Sincerely

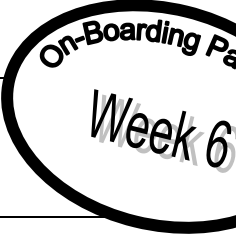
Cedric Edward Oh

CEO



3. Six-month onboarding programme

By the end of week one	Signature on completion
a. You have met your immediate manager who is managing your onboarding process and you have been allocated a workspace	
b. You have met all your team members in your department	
c. You know the security arrangements for entering and exiting the building, including out of hours or during an emergency evacuation (day one)	
d. You have attended the health and safety briefing and/or read and confirmed in writing your understanding and acceptance of the company's health and safety policy	
e. You have attended an initial orientation meeting with your HR representative and been given a copy of the employees' handbook	
f. You are familiar with the benefits offered by the company, and have completed, signed and handed all relevant payroll documents to your HR representative	
g. You have been allocated a volunteer 'buddy' by your manager and s/he has introduced you around the office, shown you the facilities and been available for advice	
h. You have met (or spoken with) your senior manager	
i. You are familiar with the 'who-to-see-for-what' list	
j. You have been provided with the necessary equipment, tools and materials required for your role, have read and understood the policy on 'acceptable usage' and attended an information technology orientation briefing (where provided)	
k. You have access to all the necessary systems, databases and links relevant to your role	
l. You are familiar with your company's/country's intranet	
m. You have completed the company's online global orientation module (if available and relevant)	
n. You have a general understanding of the company's products, services, solutions, clients and business objectives	
o. You have discussed your role and key responsibilities with your direct manager, having read and understood the job description for your position (where provided)	
p. You have held a first week debriefing with your direct manager and HR representative to ensure that your initial expectations of the job, and your company's expectations of you, have been met	

By the end of week six	Signature on completion
a. You have met with colleagues and others who are relevant to your role across the organisation	
b. You are familiar with the performance requirements of your role and have an understanding of how the company uses performance management to drive a high-performance culture	
c. You have attended the company orientation or induction programme (where available)	
d. You are familiar with the company's strategic objectives and business plan, as well as your role in contributing to them	
e. You have a good understanding of the company's values (and behaviours) and have clarified these with your manager	
f. You understand the company's annual variable incentive plan (bonus or commission) (if applicable to you, and if available)	
g. You have met with your manager to discuss and agree on your performance promise, i.e., the key responsibilities of your role and your immediate goals as part of performance management	
h. You have had an interim orientation and performance review meeting with your manager (and the HR representative) and received feedback on your performance to date	
i. You are beginning to know and feel that you made a good career choice by joining the company	



By week 12	Signature on completion
a. You have accessed the company's intranet or library and are familiar with the training and development opportunities available to you	
b. You have discussed with your manager the range of appropriate learning and development opportunities available to you in the company, and appropriate to your position	
c. You are familiar with the career development tools and processes available to you through the company	
d. You have met with your manager and discussed and documented your personal development plan to support the achievement of your performance promise (role and goals)	
e. You have a clear understanding of the impact of your role on your team	
f. You have had a formal 'end-of-probation' meeting with your manager and have completed probation documentation (where applicable)	
g. You have completed an onboarding/orientation feedback questionnaire and/or had an end-of-orientation feedback interview with your HR representative	
h. You have had a 12-week performance review meeting with your manager, received feedback on your performance to date and have discussed your experiences as a new recruit	

By week 26 (six months)	Signature on completion
a. You have completed the company's diversity programme (where provided)	
b. You have attended at least one training programme, or undertaken a development activity, to implement your previously agreed personal development plan	
c. You have considered and drafted an initial career development plan	
d. You have actively supported a company-sponsored 'outreach' project as part of the company's commitment to the broader community (where relevant)	
e. You have a clear understanding of the impact of your role on your team, as well as on other areas in the business	
f. You have had a formal six-monthly performance review meeting with your manager as part of performance management, received feedback on your performance to date, confirmed your role and updated goals where needed, and reviewed progress made against your personal development plan	
g. You have met with your manager to discuss and document your career plan for the next 18 months to two years ahead	
h. Congratulations! You have been successfully onboarded into the company. You have qualified to receive and enjoy a company desk toy as a sign of our mutually beneficial partnership	
i. You feel proud to be 'on board' and have a healthy sense of belonging in the organisation. The company has won over your 'head' and your 'heart' in that you clearly understand your role and feel good about playing that role in this organisation	
j. You feel you want to serve the organisation, knowing that its people and processes serve you in return	



4. Onboarding feedback questionnaire

It is recommended that a new recruit complete an onboarding/orientation feedback questionnaire and/or has an end-of-orientation feedback interview with the HR representative from the end of week 12 of an onboarding programme. In either case, the following questionnaire will guide the interview process. The questionnaire is based on the 12 pointers for effective onboarding included under point 1 at the start of this tool.

INSTRUCTIONS: As a recently employed recruit, please tell us about your onboarding experiences. Assess how well the organisation's onboarding processes worked for you by answering 'yes' or 'no' to the following questions.

- **Tick (✓)** for **YES** and make a **cross (✗)** for **NO**.
- Also, please provide comment on all areas to elaborate on or explain your ratings.

Onboarding best practice criteria	✓ or ✗
1. Did the onboarding process begin during the final stages of your selection interviewing process, when some of your new team members met with you in the final interview (among them would have been your 'buddy')?	
Comments:	
2. Were you communicated with and made to feel you were specially selected and were you warmly welcomed to the organisation before you arrived on your first work-day?	
Comments:	
3. Did the onboarding process inspire in you, as a new recruit, a sense of pride in having joined the organisation?	

Comments:	
4. Were you given a strategic view of the organisation, so that you understood the organisation's vision, mission, values and culture right from the start?	
Comments:	
5. Was there a 'buddy system' in place where an existing staff member took responsibility for playing a supportive role in your induction into day-to-day organisational formalities and procedures?	
Comments:	
6. Was compelling 'story-telling' used as an important method for initially communicating the organisation's values and other important qualities?	
Comments:	
7. Was the company's orientation programme appropriately focused on your needs as a new recruit, designed and scheduled in easy-to-understand modules, interesting in content and interactive in nature?	
Comments:	
8. Was the induction programme scheduled at the correct time, neither too soon nor too late after you joined the company?	
Comments:	

9. Was relevant supporting information available to you on the company intranet or via other systems?	
Comments:	
10. Was a mentoring programme in place where you could choose a mentor to support your career development in the organisation?	
Comments:	
11. Were practical mechanisms in place for you to regularly and easily communicate how you were doing and feeling during your first months of employment?	
Comments:	
12. Were all managers committed to the business case and the importance of onboarding new recruits, and in playing their supportive inducting role effectively?	
Comments:	

Areas worthy of praise

What aspects of the organisation's onboarding process deserve special praise?

Areas requiring improvement

What can the organisation do to improve the effectiveness on the onboarding process?
