talentlms

Employee onboarding:

A complete guide to setting your teams up for success

Table of contents

Introduction

Onboarding fulfills a broad range of functions. And delivers an equally broad range of benefits. **So much more than just form-filling and HR paperwork**, it spans the whole period from making an offer, and your candidate accepting it, to their induction and first few months (or even the first year) into the job.

Which is why, whatever the shape or size of your business, how you onboard new hires matters just the same. Yes, the way you approach your onboarding will differ according to your company's unique situation. Perhaps you're a startup embarking on your first phase of recruitment and relatively new to the onboarding landscape. Or you may be an established enterprise organization looking to scale at speed and need to adjust your approach to keep pace. Either way, **your end goal is most likely to be in sync: To give your new employees everything they need to rise to the challenges of their new role.** And to give them every reason to stick around and keep performing well.

In this onboarding study, we cover it all; from practical tips and checklists to the theory behind better onboarding, how to evaluate it properly, and what the future (and success) might look like. But you don't have to read it cover to cover. You can if you want to, of course. But it's designed so you can dip in and pick out what's meaningful for you.

Starting out

If you're first-timers and looking to set up your onboarding process, our opening chapters offer a comprehensive 'how-to' guide. Here you'll find everything from building a strong business case ('Why onboarding matters') to what you should include in your onboarding package, and who to involve in the process.

Scaling up

If you're seasoned onboarders with a process in place, we've got checklists, tools, and templates you can use to standardize and streamline your approach. You'll find these towards the end of the guide in chapters 8 to 10.

Logging on

Maybe you're a bit of both, or neither, but have recently transitioned to a remote-first working arrangement and are more interested in finding effective ways to onboard virtually. In which case, jump straight to chapter 7 for a complete toolkit of remote onboarding ideas and best-practice tips.

Ready to climb aboard?

Let's get the ball rolling with a bit of background.

Chapter 1

What's onboarding and why does it matter?

Back in 2019, we ran a survey around onboarding. Having an accurate definition of what we meant by onboarding was the first important step in the process.

Working in partnership with experts in the field, we gathered insights from them, as well as data from our respondents. To help us better clarify the definition of onboarding, we looked to one of those experts.

Assistant Professor of Management and Human Resources at the California Polytechnic State University, Dr. Allison M. Ellis's definition of onboarding was as follows:

The process of assisting new hires in gaining a functional understanding of the skills and tasks required in their new role, helping them to develop new relationships with others in the workplace, and facilitating an understanding of the company culture and goals.

So far so good. With a clear, comprehensive, and common definition of onboarding to ground our research, we could move on to the next step: **The rationale behind the study.**

Which was: [Why does onboarding even matter?](#) Before we embark on a study of onboarding, we needed to make sure it was of value. Industry stats helped concentrate our minds. Then, pulling on external research, four key areas emerged when looking at an ROI.

Costs

Why spend money on onboarding? Surely you could do the bare minimum (at low or no cost), focus instead on on-the-job training, and allocate your budget elsewhere.

You could. But you shouldn't.

Why? **Because it's a short-term solution.** It may seem like you're making savings. But in the long run, you're actually losing money. Let's look at the stats:

Recruitment's an expensive business. It's also an investment. And when you lose an employee due to poor or nonexistent onboarding, you're in negative equity. **In fact, the figures show it's often worse than that.**

According to SHRM, companies spend an average of $4,700 on each new hire. And that's just the recruitment costs. You also need to factor in lost productivity and all the money you've spent training and onboarding them. No surprise then that Josh Bersin of Deloitte puts the cost of losing an employee at around two times their annual salary. **Let's not forget that an employee's value grows over time, too.** So in terms of your investment, you only really get your money's worth if they stay around for a while.

Retention

As we've seen, keeping hold of employees maximizes your investment. So how does onboarding help? Well, there's a strong and direct link between good onboarding and higher retention. **The first few months of employment are crucial** because that's when new hires are most likely to leave a company. Almost 33% of new hires start looking for a new job within their first six months, and that percentage is even higher among millennials. SHRM found that up to 20% of employee turnover happens in the first 45 days.

Provide a strong and structured onboarding experience, however, and it's a different story. The figures show that investing in onboarding raises new hire retention by 82%, so new employees are more likely to be with the organization in the long run.

Productivity

You've hired a candidate because you needed a competent person to do a certain job successfully. And the sooner your employee starts being productive, the better.

Here's where good onboarding helps. With the right training, they can start applying their skills on the job sooner. In fact, Google managed to boost productivity among new hires by 25% with just one onboarding email. Imagine what a whole onboarding strategy can do for you.

Branding

One of the biggest challenges organizations are facing today is competition for talent. With so many opportunities and an employment market full of choices, **companies have to work harder to source and secure qualified new hires.**

So, why should a candidate choose you over someone else?

Look to your employer branding. Grow your reputation, and you stand a better chance of being their preferred pick. But how do you do that? **Providing a rich and rewarding onboarding experience** is a good place to start. Because the more satisfied your new hires are, the more likely it is they'll share their positive experience with you and your company. (To be honest, they'll discuss their experience whatever you do. But you want positive feedback, not negative. And how you approach your onboarding will determine what kind of feedback they have).

Let's recap!

01 Chapter

What's onboarding and why does it matter?

Onboarding helps new hires learn about their new role, their new colleagues, and their new company (its culture and its goals). Its benefits include increased employee retention, financial savings, faster productivity, and better branding.

What onboarding includes

Onboarding started out in the 70s as something called "organizational socialization" (catchy, right?).

It targeted new hires during their first few days at a company. And it was as formal and uninviting as it sounds. In its early days, it focused purely on paperwork mixed up with some basic, preliminary training. And, while time's moved on, many organizations' onboarding approach hasn't.

Unfortunately, a large number of organizations still focus onboarding primarily on processes and paperwork. The average onboarding experience (according to Sapling) calls upon new hires to:

- read, sign, and upload 3 different documents (of varying lengths)

- complete 41 administrative tasks, and

- deliver at least 10 learning outcomes.

The most popular form of training by far (53%) is mandatory compliance training such as health & safety and fire awareness. Important, yes. But inspirational and motivating? Couple this with the fact that most organizations (35%) only spend a week onboarding new hires (and a worrying 20% just a day), and it's no surprise that 88% of employees rate their onboarding experience as "not great." And only 29%t feel fully prepared and supported to excel in their role.

The good news is onboarding trends are changing as companies look for new ways to make onboarding personal and playful, but also practical and productive. So, what should onboarding include to support this approach? Let's take a look.

Focus on people, not paperwork

Well, a more progressive (and arguably more effective) approach to onboarding focuses on people over paperwork.

Sure, filling in forms is important. But **there has to be a balance between admin and acclimatization.** A realistic rhythm to the onboarding program gives new hires the freedom to adapt at a steady pace. And the flexibility to absorb more than just policies and processes.

Modern onboarding kits are practical, but they're also motivational and

engaging. They balance important information about the job and workspace with strategic insights into company culture, values, and vision. And opportunities to meet colleagues in both formal and informal settings.

Take your time

Content covered. Now the other major factor is time. **The duration of your onboarding program matters**. In our survey, the longer it was, the more employees felt ready to take on and conquer the challenges of being the new face in an organization.

[BambooHR](#) agrees. According to their own employee onboarding survey, 31% of people left a job within six months, with 68 % of those exiting after just three months. **Carrying your onboarding process up to then** (and beyond) rather than just for the first day or week gives them a more manageable introduction to the company and their role. It shows that you're there to support them and are willing to give them time to acclimatize. It also gives you a better chance of retaining them.

In many ways, the time element is more about mindset than formal delivery. You can pin your program down to a fixed number of days or months.

Anything between 30 days and 6 months would work well. But, a more meaningful approach is to adopt an indefinite commitment. Internal mobility, after all, is a common feature of most modern workplaces as employees change roles, teams, and departments. Values, vision, and organizational priorities also change. Both of these are good reasons to keep the onboarding ethos going. Not to mention the fact that, according to research, the socialization process alone can take up to a year.

Provide structure

That said, your formal onboarding experience needs structure. So, how should you organize your onboarding, and how much time should you give each segment? **Every case is, of course, unique.** And what you include and for how long depends on a number of factors: resourcing, investment, the size of your company, your new hire intake, and other commitments. But, as a guide, here's a template to work from:

> **Stage one:** Preboarding
> **Duration:** From acceptance of an offer to the official start date.

Preboarding serves two purposes.

It's a time for admin. Documents need to be signed and forms filled in. Doing this now frees up time on day one for more meaningful activities, such as meeting colleagues and forming relationships. Your new hire also needs to prepare for their first day (what to wear, where to go, and when).

But it's also a time for keeping in touch and further engaging. You've invested a lot into hiring the best person, but they haven't started yet. Which puts you in a vulnerable position. **What if they get poached by another company?** To keep them excited, you need to form a connection. Remind them why they were chosen, make them feel valued and needed,

and remind them of what they have to look forward to at your company. And share any company news or updates you think they may want to see.

Tip: Don't over-communicate: remember they haven't started yet and don't want to feel overwhelmed. But do share anything "light" that gives them a flavor of your company culture.

> **Stage two:** New hire welcome, orientation, and team training
> **Duration:** Week one (maybe two)

Your new hire's started and is ready to be welcomed into the fold. **A mix of formal and informal activities** and several onboarding workflows takes place during this phase. Again it's a mix of the practical and personal. There's the IT setup and workstation orientation. Plus, training around tools and processes, HR policies, and compliance. But there are also crucial meet and greet sessions, both informal and formal, to lift and lighten the mood.

> **Stage three:** Relationships and role-specific training
> **Duration:** First month

With most of the mandatory 'tick-box' tasks out of the way, new hires are ready to learn more about the specifics of their role. And to sync up and socialize team members and other key contacts across the organization. **This is a key phase for building trust**, forming relationships, and setting goals. Again,

it's important to introduce cultural touchpoints to remind new hires of company benefits, beliefs, and values. And show them how they contribute to the bigger picture.

> **Stage four:** Performance and growth
> **Duration:** 2nd and 3rd month

As employees find their feet and take on more responsibilities, this is the time for regular performance reviews, mentoring, and feedback to support development. During this phase, training needs will be reassessed and offered depending on any gaps in knowledge or skills identified. Regular contact with a new hire's manager or team leader plays an important part in this stage of onboarding.

> **Stage five:** Nurturing and development
> **Duration:** 4th month onwards

Here's where onboarding becomes less structured and more reactive. With new hires firmly placed in their teams and fully functional, the focus shifts to continuous learning and improvement based on individual needs.

Regular one-on-one meetings are key to ensuring employees receive feedback and are on track to meet their goals.
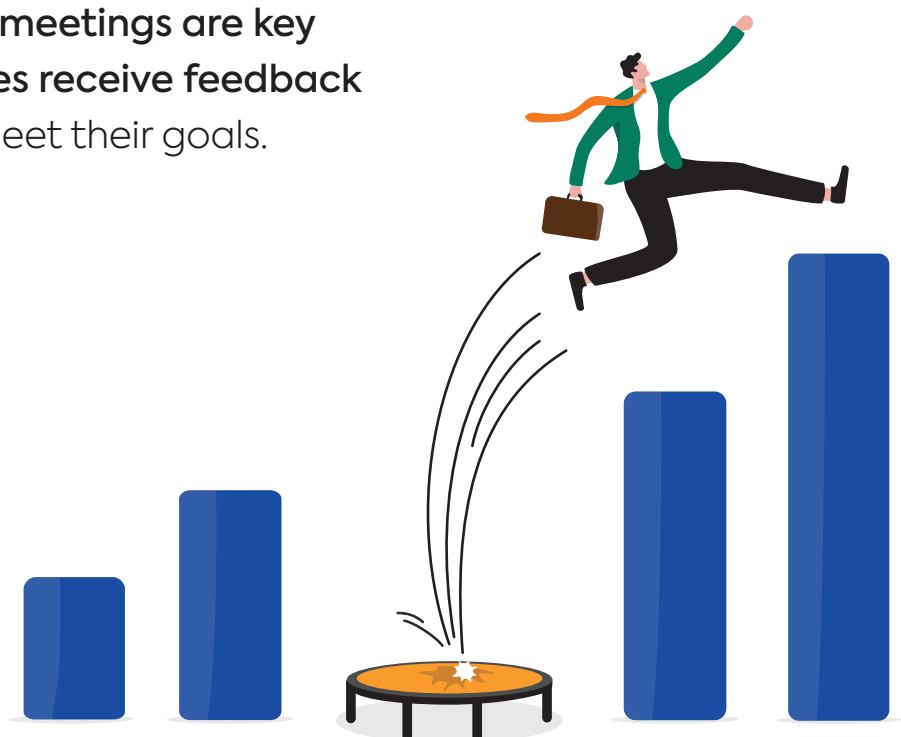
Let's recap!

02 Chapter

What onboarding includes

For onboarding to be effective, it needs to last longer than a day or a week. Ideally, it should stretch from the moment the employee's contract is being signed to 6 months or a year into their new role. It also needs a structure that reflects the different stages in the process.

How new hires feel about onboarding

When scoping out what to include in an onboarding program and how to deliver it, who better to look to than employees themselves.

Having been through the experience (whether with you or with another company), they're best placed to speak first-hand about it; what worked, what didn't, and what was missing.

Gathering feedback from new hires themselves can also help build a stronger business case for onboarding, whether it's introducing it or adapting it. **Give them what they're asking for** and you're on to a winner. But what are they asking for? In short, they want to learn how to do their job well. They also want to feel connected. And to be involved and immersed in the company as quickly as possible.

To help build a more detailed picture, it helps to review some of the standout stats taken from our [onboarding study](). This study revealed that, done well, onboarding makes new hires feel:

- welcomed and valued (65%)
- accepted by colleagues (63%)
- less anxious as newcomers (62%)
- clearer about their responsibilities (71%)
- prepared to do their job (71%)
- more productive, quicker (65%)

〰

All positive but quite general. So we drilled down deeper and discovered the following...

Meet the manager

According to [the same study](), the number one concern employees (20%) have about their onboarding experience is cultural expectations. They want to know what their supervisor expects of them.

It's no surprise then that meeting their manager on day one links directly with overall onboarding satisfaction. In fact, **the satisfaction rate doubles (40%)** for those who met their supervisor on their first day, compared to those who didn't (20%).

Skills and processes

The second biggest concern according to our research (17%) relates to skills. Employees want role-specific training which is needed to do their job well. Research carried out by BambooHR also echoes this with 76% of people rating on-the-job training above all other aspects of onboarding training. They also (56%) feel that being assigned a "buddy" or mentor **helps them become productive more quickly.**

Although, worryingly, only a third of our respondents felt their onboarding training gave them the resources and tools they needed to do this well.
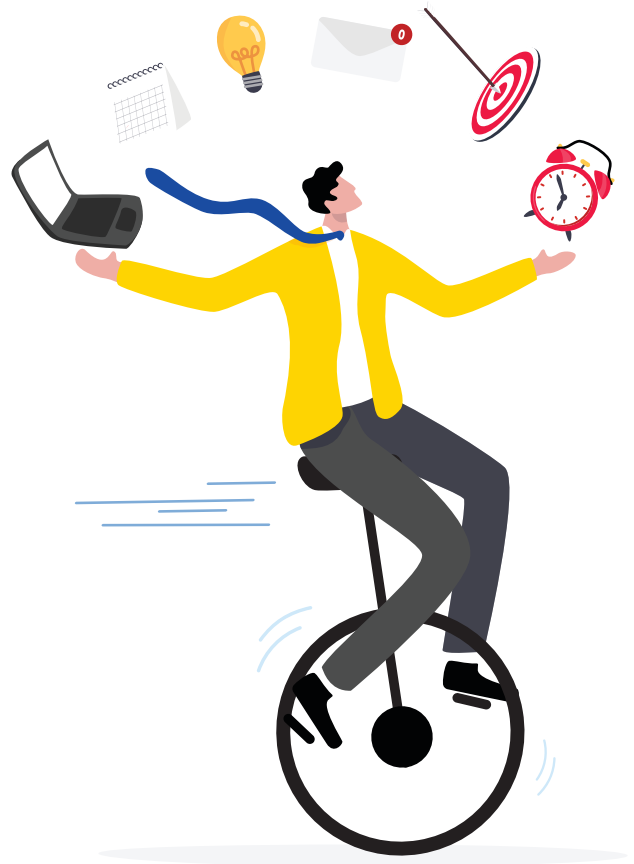
Clarity around responsibilities

BambooHR's research also highlights the need to include job-related details. 23% of new hires who left a job shortly after their first day linked their decision to a failure to: "receive clear guidelines to what responsibilities were."
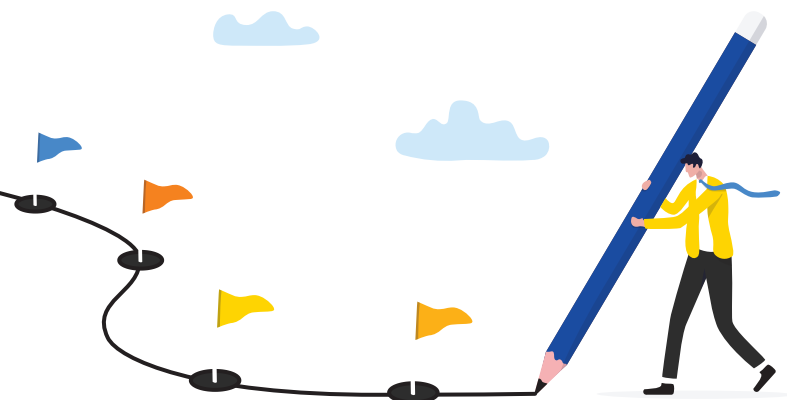
Development

Career development is [one of the main reasons people leave their jobs.](#) And, according to a study by Sapling, it's a definite must when designing an onboarding program. Why? Employees who feel their onboarding provided a clear plan for their professional development are 3.5 times more likely to strongly agree that their onboarding process was exceptional.

Culture and connection

People and culture fit are often among the most important things **employees look for in future employers**. This falls in line with the 17% of respondents of the aforementioned BambooHR poll who said: "a friendly smile or helpful co-worker" would have prevented them from leaving the company so soon after joining.

Delivery

And what about delivery methods? Does how you provide your onboarding impact how your new hires feel about it? **Research suggests, yes.** Higher levels of satisfaction (33%) were achieved when employees were onboarded using [blended learning](#).

A new generation

It's easy to group all employees together, but different generations expect and want different things from onboarding. In a separate study focusing on the workspace expectations of Generation Z, we included a section on onboarding. And discovered the following:

- ◯ 62% of Gen Z employees agree onboarding equipped them with resources and skills to do their new job well.

- ◯ 67% agree that onboarding made them feel welcome and valued.

- ◯ 62% agree that onboarding has reduced their anxiety.

Most of these stats concur with more general research. But one standout area relates to culture.

From a commitment to diversity, equity, and inclusion to environmental responsibility, **Gen Zs are highly socially conscious.** 77% want to work for a company that cares about DE&I. 58% want their company to be more environmentally responsible. And 68% want to work in a company that is actively committed to social causes.

How does this relate to onboarding? Well, **creating meaningful connections** during those fragile first few days requires an onboarding experience that shares and showcases organizational values.

Let's recap!

03 Chapter

How new hires feel about onboarding

Understanding how new hires feel about onboarding and what they want it to include is essential to its success. Clarity around job roles, information about career development, an insight into the culture, and the opportunity to meet their manager early on, all rank high in their expectations.

Who is responsible for onboarding

When scoping out what to include in an onboarding program and how to deliver it, who better to look to than employees themselves.

Having been through the experience (whether with you or with another company), they're best placed to speak first-hand about it; what worked, what didn't, and what was missing.

The recruiter

Hands-on throughout the hiring process, your recruiter will already have had a lot of contact with your new hire by the time their onboarding begins. Having formed a connection, they're in a good position to introduce other key people to your new hire.

They could, for example, send the initial email with the contact details of the HR person handling all of the onboarding admin. And also explain informally a little about the process and what's involved, making themselves available during the pre-boarding stage for any questions your new hire may have. A great way of keeping the connection going and the tone light is by **being friendly and approachable during those fragile weeks that lead up to your new hire's first day.**

The HR team

The backbone of your whole onboarding operation, your HR team, keeps everything on track. Scheduling sessions, sending emails and invitations, coordinating paperwork, collating training content, organizing courses, not to mention answering all of the HR-related queries your new hire will have, they're fully involved from day one.

And their input doesn't stop there. **As your new hire moves through the different onboarding stages,** they'll be required to arrange performance reviews, organize additional training, and keep employees engaged throughout the first year, and beyond.

The line manager

We've already touched a little on the important role played by your new hire's supervisor or manager, particularly in the early days of onboarding. Meeting them on the first day makes a real difference in how welcome and connected new hires feel.

In fact, it raises satisfaction rates across the board, from delivery, format, and content of the onboarding program to the overall experience.

But they also make a real difference beyond this. Providing ongoing feedback, organizing targeted and timely training, and connecting new hires with people in other departments and teams, are all key areas of responsibility for your manager.

The IT team

It's not what you know, but who you know.

Although not entirely true, this phrase does carry a lot of weight when it comes to your IT experts and how they can influence the onboarding experience. The guardians of both your company's software and hardware, they're the gateway to pretty much everything your new hire will need to learn about and do their job, carry out their training, and connect and communicate with others.

And including them in your onboarding schedule is a must. As well as providing formal set-up support on day one, your new hire should know how to contact them whenever they've got a technical issue or concern. Because if the tools or software don't work, neither will they.

The buddy

Being a newcomer's nerve-wracking. They need to ask questions. Often quite a lot of questions. But disturbing others, particularly busy team members they don't know that well, can feel awkward. Here's where a buddy comes in.

Having one designated person your new hire can legitimately go to for support, information, or just a friendly word, makes a real difference. Just saying the word buddy sounds reassuring. And it is. It lowers anxiety, reduces stress, and aids productivity. So if you can include them in your onboarding, all the better.

An informal arrangement, all it takes is an introduction on day one and access to the relevant tools they need to communicate, and this aspect of onboarding pretty much runs itself. **Just make sure your 'buddy' is happy** to take on the role, has the right qualities, and knows what the role entails.

The mentor

As your new hire becomes more embedded in your organization and settled into their role, **it's a good idea to assign a mentor.**

Having someone more senior and experienced to guide, challenge, and encourage keeps the onboarding process fresh. And it's an effective way of supporting their professional development (a main motivator for new hires.)
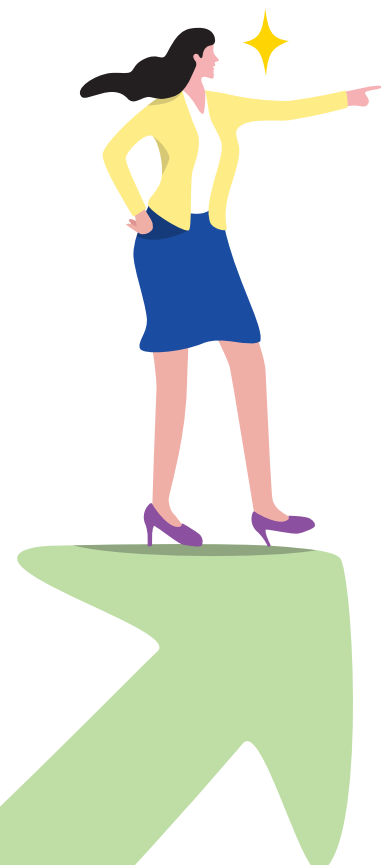
Let's recap!

04 Chapter

Who is responsible for onboarding

Onboarding doesn't just rest with your HR team. There are a number of key roles involved at different stages in the process, from a recruiter, line manager, and IT support to a buddy and mentor.

Chapter 5

Building a successful onboarding process

Onboarding serves lots of different functions. To guide you through the different stages, we've compiled a checklist of what to do, and when. This list isn't prescriptive. Every onboarding kit and process is different so it's designed for you to pick and choose what meets your needs.

Nor is it exhaustive. There may be tasks or actions you want to add. But it's a good way of checking you've covered all the basics. And more.

Preboarding

This is a time for completing essential paperwork, sharing HR details, and for more informal 'keeping in touch' communications. Remember to engage new hires during [preboarding](#) as well as inform.

Checklist:

○ 'Welcome to the company' email or hand-signed and posted letter (sent by recruiter, line manager, or CEO)

○ 'Meet your HR contact' email (sent by recruiter)

○ 'Meet your new manager' email (sent by recruiter)

○ 'Welcome to the team' email (from line manager). Includes information about colleagues and their roles as well as general information about what the new hire will bring to the team.

○ 'Meet your new team' email (sent by the line manager)

○ General information about the working environment and expectations. For example dress code, working hours/days, flexible/ remote working (sent by HR manager)

○ Payroll details (how and when will they get paid)

○ 'What to expect on day one' email (sent by HR manager)

○ 'Have you got any questions?' email (sent by HR manager)

○ New employee questionnaire asking about their hobbies, interests, and the company values they relate most to.

○ An agenda for the first day and week on the new job, including onboarding training

○ **Copies of the following documents (sent by HR manager):**

- Employment contract
- Terms and conditions of employment (including working pattern) Confidentiality agreements
- Emergency contacts
- Company policies (HR policies, performance standards, and expectations, code of conduct, training and development)
- Employee benefits
- Organizational chart

○ 'See you tomorrow!' / 'Enjoy your first day' email (sent by recruiter)

💡

Tip

You can also share company newsletters, general announcements, and internal comms engagement content (podcasts, videos) **that might inspire your new hire and give them a taste of your culture.**

Getting to know the office

It's important to make your new employee feel at home when they're in the office. That means helping them become familiar with the physical space and giving them the practical information they need to feel safe and comfortable.

Checklist: Day 1

- ○ Office map (with emergency exits and bathrooms plotted)

- ○ Office tour

- ○ Office opening and closing times

- ○ Information about meeting rooms and communal / breakout spaces

- ○ Health and safety guidelines

- ○ ID card, fob, or pass

- ○ Office access items: Parking permits, entry cards

- ○ A guide to the local area, amenities, and preferred employee hotspots (coffee shops, restaurants, parks, shops, and gyms)

> Checklist: Month 1

○ 'How to book a meeting room' guide

○ Health & Safety training

Meeting the team

How your physical workspace looks and functions is important. But it's the people who give it meaning. Help your new hire integrate with their colleagues and associates by doing the following:

> Checklist: Day 1

○ Meeting with new hire's line manager

○ Introduce new hire to their buddy

○ Introduce new hire to their immediate team

○ Use internal messaging tools (Slack, for example) to welcome the new hire to the company and to give colleagues the opportunity to say 'hello'

○ Share a short bio of the new hire with the team/company

○ Schedule informal refreshment breaks with the new hire and other team members

Checklist: Week 1

○ Introduce new hire to other key people in the department and other key stakeholders

○ Share a directory of employee profiles including names, contact details, and usernames on company messaging applications like Slack or IM

IT setup

More than simply systems and software, without the right IT setup and support your new hire can't do their job or communicate with others. So it needs to be right from day one.

Checklist: Day 1

○ IT equipment and hardware provided and in place (laptop, desktop, phone, mouse, keyboard)

○ Software installed giving access to all company-wide and job-related systems (including your [online onboarding training software](#))

○ Email account set-up

○ SSO login information or URLs, usernames, and passwords for different systems and accounts (company email, LMS, project tracking applications)

○ WiFi details and password shared

○ Security protocol explained

○ Contact info for IT support

Checklist: Week 1

○ Introduction to in-house training software or learning management system (LMS)

○ Login details for LMS (URL and password)

Checklist: Month 1

○ Mandatory compliance training completed

○ Mandatory cybersecurity training completed

○ Additional IT training requested

Workstation

Everyone needs their own space. And for it to feel like it's theirs. Including a few personal touches as well as providing the standard tools and equipment will make your new hire feel welcomed and supported in their new role.

Checklist: Day 1

○ Stationery (pen, post-its, notepads) provided

○ Instructions on how to use and personalize the desk phone (voicemail settings, etc.)

○ Branded swag (water bottle, mouse mat, mug t-shirt)

○ Names business cards

○ Industry or job-related book (motivational and thought-provoking rather than instructional)

○ Nameplate for desk

Organizational alignment

Onboarding's as much about engagement and inspiration as it is form-filling and paperwork. Set the balance from the start by sharing your company's ethos, vision, and individuality.

Checklist: Preboarding up to week 1

◯ Strategic documents explaining the company's vision, values, mission, and goals

◯ Examples of the company culture and values such as the latest company newsletter. Or podcasts and videos of current employees describing what they enjoy about working at the company.

◯ Links to the company website, social media pages, and blog

◯ The company's employee value proposition and 5-year plan

Let's recap!

05 Chapter

Building a successful onboarding process

Because of its multi-faceted nature, onboarding can be hard to evaluate. But knowing what to measure and how can help make it more manageable. Key metrics should include performance and productivity, turnover, knowledge assimilation, workflow efficiencies, resourcing, and engagement.

Evaluating the onboarding process

The sum of many parts, the success of onboarding can be hard to measure. In fact, for 36% of HR managers it's one of their biggest onboarding challenges.

But you must measure it. Because, with so much at stake (not least, keeping hold of your newly hired employees) and so much invested (time, resources, and energy), you need to make sure you're hitting the mark. And that you're continually improving and adapting to meet the needs of both your new hires and your onboarding stakeholders.

Measuring onboarding success means two things: figures and feedback. But what kind of figures? And what kind of feedback? Below are 5 metrics you should look to include. Coupled with some ways of gathering that data.

01. **Performance and productivity**
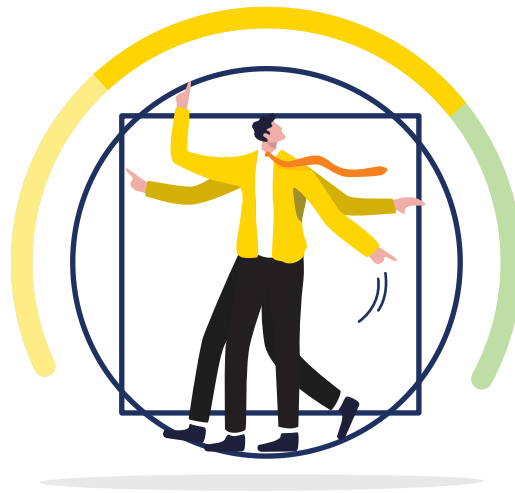
What to measure:

How long does it take for your new hires to perform at a similar level to longstanding employees in a similar role? And how long does it take for new employees to add value and start delivering results?

How to measure:

Set Key Performance Indicators (KPIs) for each role. Set incremental deadlines and measure KPIs at each point. Use data from internal reporting systems or tools (where applicable). Record the number of days it takes for a new hire to achieve those KPIs from their start date. To find the average, total the number of days for all new hires over a given time frame and divide it by the total number of new hires.

Stats only tell part of the picture, though. Source and record anecdotal and qualitative feedback from line managers, too.

Why measure:

This metric has a dual purpose. It shows how your new hire is contributing to your company's bottom line. But it also shows how engaged they are and how likely they are to stay with you.

What to remember:

Keep in mind that KPIs will vary according to the different positions within your company.

02. **New hire turnover**
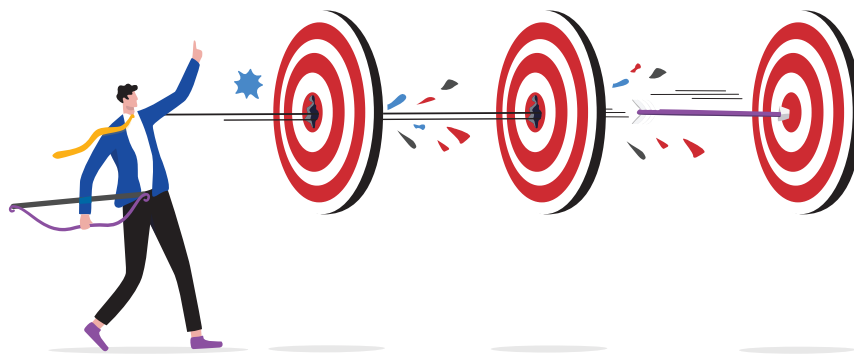
What to measure:

This metric is all about retention. What's the average length of time an employee stays at your company? How are these numbers split across departments, teams, or locations?

How to measure:

Use HR data to divide the number of new hires still in post after one day, one week, one month, and beyond by the number of employees who have left.

Why measure:

Tracking the average tenure of employees allows you to identify potential patterns in terms of flight risk. Then you can begin to implement feedback surveys and other retention-boosting techniques slightly earlier.

What to remember:

There may be other issues that cause people to leave a job quickly, such as a bad culture fit or change in personal circumstances. But most of those can still be resolved through onboarding. Are you highlighting culture, mission, and values during the process? If so, are you doing this early enough? Have you emphasized company benefits and flexibility enough?

03. **Knowledge assimilation**
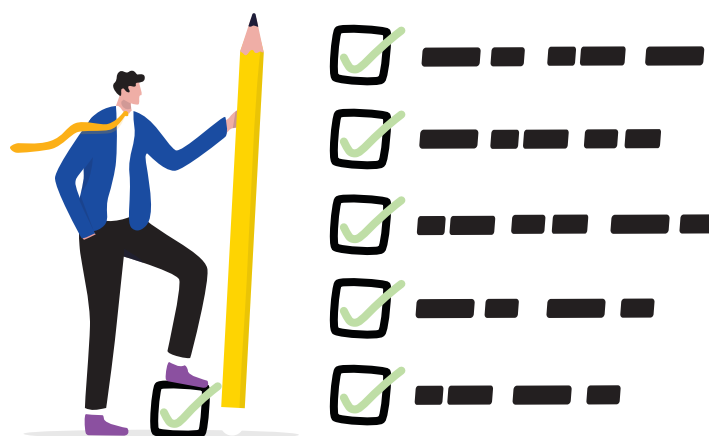
What to measure:

What have your new hires learned about their role and place in your organization?

How to measure:

Ask them to complete a short assessment. Produce a series of questions based on job-related activities and their day-to-day workflows. You can also include questions around company values and goals.

Why measure:

This helps pinpoint common areas where onboarding isn't quite working. And areas where you're nailing it.

What to remember:

If a number of employees are struggling with the same questions, most likely it's not them, it's you (or your onboarding process). But don't take it personally. **Perfect doesn't happen overnight.** But with the right feedback and assessments, you'll get there in time.

04. **Efficiency and impression: Impact on resourcing**
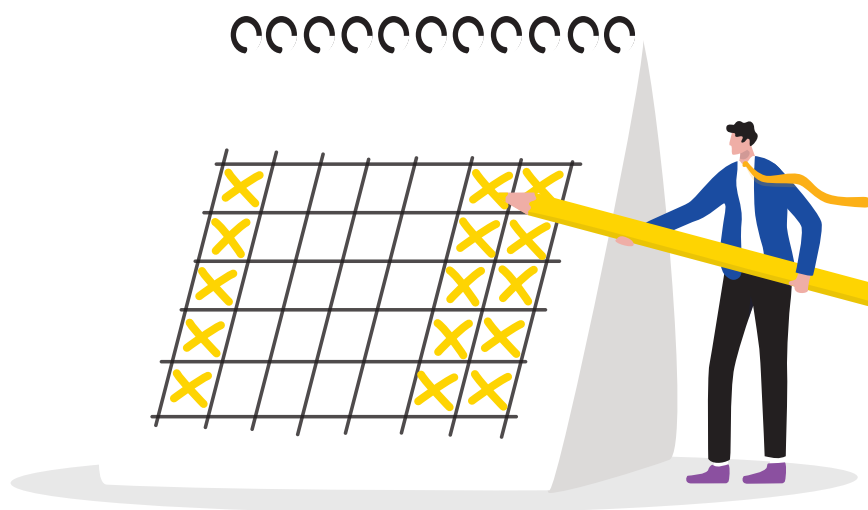
What to measure:

The consistency of approach and impact of onboarding on your existing employees. Do your stakeholders all have the same vision and expectations of your onboarding process? How much time do they have to commit to it, and how often? How many questions are they still having to field from new hires?

42

How to measure:

Design and distribute an onboarding survey for non-HR stakeholders, including line managers, buddies, mentors, and other key figures. Or, use a 360-degree feedback model with the new team member's peers and managers to gain an insight into how they're performing.

Why measure:

Doing **this will help you identify what elements might be missing** from your onboarding program. And at the same time, establish if there's a consistent approach to the onboarding experience by those involved in it.

What to remember:

Get the timing right. This won't work after just a week or so into the process. 120 days after new hires' start dates is a good time to carry out this kind of assessment.

05. **Engagement**

What to measure:

How your new hires felt about the onboarding process in general. And, more specifically, the different stages and types of training they received.

How to measure:

Make an (anonymous) onboarding survey a formal part of your onboarding process. Segment it up so you have questions about all the different phases and objectives. Share it with new hires at significant stages in the process. You could, for example, carry out one survey after their first week or month-long orientation and then survey them again 6 months or a year into their tenure.

If you don't have time to design your own, use a pre-prepared onboarding survey and adapt it to make it your own. **To get an even richer insight,** you might like to use one-on-one interviews and training reports (what percentage of different courses were completed, for example) downloaded from your LMS— if you have one.

Why measure:

Your new hires experience your onboarding program from start to finish and are perfectly placed to provide detailed insights into every aspect. Asking them for their opinion shows that you value them and their views, too. And this, in turn, paves the way to a stronger and long-lasting relationship. **In fact, the stats show that** getting feedback from new hires **improves your relationship by 91%.**

What to remember:

This isn't about what your new hires learned. Rather it's about how they felt about the process and program.

Let's recap!

06 Chapter

Evaluating the onboarding process

Because of its multi-faceted nature, onboarding can be hard to evaluate. But knowing what to measure and how can help make it more manageable. Key metrics should include performance and productivity, turnover, knowledge assimilation, workflow efficiencies, resourcing, and engagement.

Best practices for remote onboarding

Since 2009, the underline number of remote workers has risen by 159% according to a study by Global Workplace Analytics. And findings of a underline survey by Software Advice show that 49% of HR leaders, prompted by the necessities of a global pandemic, have committed to hiring more remote workers moving forwards.

01. **Smooth out the set-up**

Your remote new hire is powerless without their IT equipment. So it needs to be ordered and delivered well before day one.

Apart from the obvious (laptop, phone, mouse), make sure you discuss other peripherals such as a chair and desk.

And check to see if they have any special requirements or need any reasonable adjustments. You can create a remote inventory checklist so that you'll get it right every time. Schedule a guided set-up session. **Or make sure they have clear instructions** on how to set everything up and know who to contact if they need help.

02. **Offer transparency**

From documenting processes and workflows to sharing company announcements and other news through videos, podcasts, or blog posts, transparency plays a big part in keeping your new remote hire engaged.

03. **Jumpstart engagement**

Without the excitement of visiting a new office on their first day and hooking up in person with new team members, remote onboarding can feel flat and uninspiring. Lift the mood and create a buzz by providing a personalized welcome pack with lots of company swag.

Showcase your culture by sharing podcasts, videos, and interviews that reflect life at your company.

04. **Adapt training**

Certain courses will be more relevant to your remote new hire; cybersecurity, IT, systems, and wellbeing training, for example. Prioritize these and offer 'How to work from home' best practices or a bespoke remote working course if you can.

05. **Facilitate connections**

It's easy to feel isolated if you're working remotely. So it's important to try and replicate the personal interactions your new hire would have had if they were in the office. Schedule short video calls with key coworkers and an introductory team meeting. Then use an internal messaging app such as Slack to let everyone else in the company know about your new hire and give them a chance to say 'hello'.

06. **Keep communication healthy**

Technology makes remote working possible. But with so many different channels of communication available, it can also make it overwhelming. Communication overload can be a real stress even for people who are office-based. So imagine how it can be for remote workers.

When onboarding remote employees, introduce your new hire to both synchronous and asynchronous communication tools. And make sure they know how and when to use each one of them. Explain your company's communication etiquette, like the best channel to ask a question or when it's better to send an email instead of an instant message.

Having both options should keep the communication defined and manageable.

And remember to schedule some training sessions during their first weeks, so they know what to use and when.

Start with the ones used more broadly by the entire company (for example, a video conference platform or a messaging app) and the ones they'll mostly need for their job (a project management platform or a design collaboration tool, for example).

07. **Set a steady pace**

Virtual onboarding can be more intense without the informal watercooler moments and coffee break catch-ups that take place in an office. **Spread your onboarding sessions over a longer period of time** and give employees some free time to absorb what they've learned so far. If you can't make the onboarding process longer, review your onboarding content and remove anything that won't excite or engage them in your company and your people. The content you remove (logistics and legal requirements, for example) can be packaged up into and shared separately.

Let's recap!

07 Chapter

Best practices for remote onboarding

With hybrid and remote working continuing to grow, more companies are moving over to online employee onboarding because it breaks down the traditional barriers of time and location. And it works for every type of employee—whether they're based on-site, at home, or a bit of both. But onboarding 100% remote employees calls for its own format and approach to make sure your new hires are engaged and connected.

10 useful onboarding tools

With much, if not all of the onboarding taking place remotely or online, the toolkit you use matters. Below is a collection of platforms and apps you can integrate into your program to make the experience seamless, efficient, and engaging.

01. **A video conferencing platform**

Given the rise in remote working, being able to provide live (and access to recorded) webinars and instructor-led onboarding training is essential.

02. **An instant messaging app**

Vital for keeping your new hires connected with each other and with others in their team and beyond.

03. **Online discussion forums**

New hires want the right information at the right time without having to voice their needs too much. Your busy SMEs, senior executives, and team leaders want to add maximum value to the online onboarding process, but (due to time pressures) need to achieve this through minimal effort. The solution? Create online communities of knowledge your new hires can access as and when they need them. And that your busy internal stakeholders can contribute to with minimum fuss.

04. **A wiki**

Organized and structured, it's a resource your new hires can use to search for what they need, when they need it.

05. **An e-signature app**

Signing contracts and forms is an important part of onboarding. But not a very interesting one. It can also be problematic if you're doing it remotely and can't print off and hand in your document. An e-signature app makes it simple, accessible, and swift for all parties to put their name on the dotted line.

06. **An HRIS**

Data is a big part of onboarding. And with data comes data confidentiality. An HRIS manages all your employee data and keeps it safe.

07. **A survey app**

Gathering feedback can help you improve and adapt your onboarding. But if it's not presented in an accessible format your new hires simply won't engage. Use an app to create compelling and easy-to-complete questionnaires your employees will be happy to complete.

08. **Online ordering tool**

With every new hire comes... stuff. Automate and process orders for stationary, software and other resources using specialized software.

09. **An online training platform**

Training's a big part of onboarding, whether it's mandatory, company-wide courses, job-specific, or systems-related guidance. An online training platform centralizes your training so your new hires can access and complete them with minimal fuss. It's also a good way to track progress and completion rates.

10. **A learning management system (LMS)**

The measure of the success of your onboarding program rests with your new hires. Is it easy for them to access and use? Is there consistency? Does it feel integrated or disjointed? With so many facets to the process, there's a real risk your new hires will feel overwhelmed and disorientated without anything to provide structure. Here's where a learning management system comes into.

From simplifying workflows and automating admin to creating and delivering courses, an LMS is rich with features designed to give your new hires a smooth and seamless introduction to your company. It also integrates with many of the additional supporting apps and tools we've just mentioned. Meaning you can bring your whole onboarding toolkit together under one roof. It's also scalable, allowing your onboarding process to keep pace as your company grows.

10 useful onboarding tools

A video conferencing platform	An instant messaging app	Online discussion forums	A wiki	An e-signature app

An HRIS	A survey app	Online ordering tool	An online training platform	A learning management system (LMS)

Let's recap!

08 Chapter

10 useful onboarding tools

There are lots of standalone tools, apps, and online resources you can use to design and deliver your onboarding program. Using a learning management system or onboarding training software you can integrate these to provide a more seamless, intuitive, and consistent experience.

Chapter 9

10 employee onboarding email templates

Communication with your new hires is key. But among all of the other tasks, it can become a burden. Having a series of email templates you can use whenever you want can really ease that burden.

Just tweak them as you need to and send (or schedule them to be sent) according to your timeline. Here are the 10 most important ones for you to add to your toolkit.

New hire (office-based) welcome

What:	New hire (office-based) welcome
When:	After they've accepted your offer
Recipients:	New hire
Sender:	HR lead or hiring manager
Brief:	To make your new employee feel at ease and come prepared on their first day.

Email subject line: **Welcome to *[company name]***

Dear *[employee name]*,

Congratulations on your new role and welcome to our team! We're looking forward to meeting you on *[start date.]*

Your contract is attached. Please sign and date it the soonest as your convenience.

Below are some details to help with your orientation on day one. But if you do have any questions, please let me know.

Please arrive at our offices on *[date]* at *[address]* by *[time]*. Head to the front desk and *[name of reception person]* will meet you there. Our dress code is *[casual/business casual/formal]*.

Your workstation will be set up and ready for you to use when you arrive (with a few surprise treats to make you feel at home on your first day).

Our IT experts will be on hand to help you log on, access your online accounts, and provide any technical support you may need. Please let us know in advance if you need any special equipment or reasonable adjustments, so we can get these ready for you when you start.

We've carefully planned your first days to help you settle in properly. You'll receive details of your onboarding program soon, including your schedule for the first day and the following week. We'll also be sending you your employment paperwork in advance so you can take your time and read it through before completing it. Again, if there are any questions, I'm here to help.

We're all excited to meet you and I look forward to showing you around the office and introducing you to your new colleagues. We hope you will join us for *[lunch/after-work drinks]* on your first day.

If you have any questions, please email or call me. I'll be happy to help.

You will make a big difference to our company and we're looking forward to working with you and helping you achieve great things!

Best,
[name]
[email signature]

New hire (remote) welcome

What:	New hire (remote) welcome
When:	After they've accepted your offer
Recipients:	New hire
Sender:	HR lead or hiring manager
Brief:	To make your new employee feel at ease and come prepared on their first day.

Email subject line: **Welcome to *[company name]***

Dear *[employee name]*,

Congratulations on your new role and welcome to our team! We're looking forward to meeting you on *[start date.]*

Below are some details to help with your orientation on day one. But if you do have any questions, please let me know.

Our day usually begins at *[time]*, so please be at your desk and ready to take a call at that time on *[date]*.

Your workstation essentials (laptop, phone, mouse, keyboard) are already on their way to you. They should arrive by *[date]*. Check the post, too, for a few surprise treats we hope will make you feel at home on your first day.

Our IT experts will be available to help you set your workstation up on day one. They'll also be available to help you log on, access your online accounts, and provide any technical support you may need. Please let us know in advance if you need any special equipment or reasonable adjustments, so we can get these ordered, sent out, and set up, all ready for you when you start.

We've carefully planned your first days to help you settle in properly. You'll receive the details of your onboarding program soon, including your schedule for the first day and the following week. Don't worry! There will be lots of opportunities to meet your new colleagues and team (albeit virtually). Details of this to follow. We'll also be sending you your employment paperwork in advance so you can take your time and read it through before completing it. Again, if there are any questions, I'm here to help.

We're all excited to meet you and I look forward to talking with you and introducing you to your new colleagues.

If you have any questions, please email or call me. I'll be happy to help.

You will make a big difference to our company and we're looking forward to working with you and helping you achieve great things!

Best,
[name]
[email signature]

New hire (in-office) onboarding schedule

What:	New hire onboarding schedule
When:	A few weeks before the start date
Recipients:	New hire
Sender:	HR lead or hiring manager
Brief:	To clarify what your new hire can expect on day one

Email subject line: **Your first day at *[company name]***

Dear *[employee name]*,

Welcome once again to *[company name]*. We're looking forward to meeting you on *[start date]*. With your start date approaching, attached is a detailed calendar of what you can expect on your first day (and beyond).

We've got lots (but not too much!) planned to help you feel at home in the office and in your new team, including:

○ Time to settle into your desk and familiarize yourself with your workstation.

○ Help set up your system accounts and any other hardware.

○ A short meeting with your team leader, *[name]*.

○ Introduction to your new team.

○ A run-down of the HR basics (policies, company products, and perks). These are included in the Employee Handbook [enclosed/attached], but this is your chance to ask questions or raise concerns about anything we haven't covered.

○ Lunch with your team.

○ Time to yourself so you can: (breathe), explore the company intranet, (breathe), absorb what you've learned so far (and breathe.)

To help you get to know the company and our people, we've arranged your access to our employee directory: *[insert link]*. We encourage you to take a look if you have the time.

We're confident that you'll be a real asset to our company and look forward to welcoming you in person.

Best,
[name]
[email signature]

New hire (remote) onboarding schedule

What:	New hire onboarding schedule
When:	A few weeks before the start date
Recipients:	New hire
Sender:	HR lead or hiring manager
Brief:	To clarify what your new hire can expect on day one

Email subject line: **Your first day at *[company name]***

Welcome once again to *[company name]*. We're looking forward to talking with you on *[start date]*. With your start date approaching, attached is a detailed schedule of what you can expect on your first day (and beyond)

We've got lots (but not too much!) planned to help you feel at home in the office and in your new team, including:

- ○ Time to settle into your desk and familiarize yourself with your workstation.

- ○ Help set up your system accounts and any other hardware.

- ○ A short video call with your team leader, *[name]*.

- ○ A video call with your new team.

- ○ A video call with our HR team to go through the HR basics (policies, company products, and perks). These are included in the Employee Handbook *[enclosed/attached],* but this is your chance to ask questions or raise concerns about anything we haven't covered.

○ Time to yourself so you can: (breathe), explore the company intranet, (breathe), absorb what you've learned so far (and breathe.)

To help you get to know the company and our people, we've arranged your access to our employee directory: *[insert link]*. We encourage you to take a look if you have the time.

We're confident that you'll be a real asset to our company and look forward to welcoming you in person.

Best,
[name]
[email signature]

New hire line manager welcome

What:	New hire line manager welcome and buddy introduction
When:	Week before start
Recipients:	New hire
Sender:	Line manager
Brief:	To open up a connection between your new employee and their supervisor, and to introduce their buddy.

Email subject line: **Welcome to our team!**

Dear *[employee name]*,

Welcome on board! It was a pleasure meeting you during the hiring process and I'm very much looking forward to you joining our *[team name]* team here at *[company name]*. I'll be your team leader and am delighted to have you (with your background, skills, and enthusiasm) on our team. Your role is an important one, and I know you will be a great asset and help us achieve great things.

We're a strong and effective team. We play a big role in *[contribution to the company]*, and we appreciate the value each of our members (including you!) brings to this.

On your first day, we'll have time to meet and talk further about your role, our team, your goals, and anything you'd like to discuss. We'll also run through your orientation plan for the first month.

We're all here to support you over the coming months, but *[employee name]* who works as a *[job title]* in our team will be your designated buddy. *[He/she/they] [has/have]* worked in our team for *[duration]* and is here to help you informally in any way they can. *[He/she/they] [is/are]* looking forward to getting to know you.

The rest of our team is looking forward to meeting you, too, working with you, and learning from you over the coming months.

In the meantime, if you have any questions, please email or call me. I'll be happy to help.

Best,

[name]
[email signature]

New hire company announcement

What:	New hire company announcement
When:	A few days before the start date
Recipients:	Company-wide
Sender:	HR lead
Brief:	A short and accessible ice-breaker introducing your new employee

Email subject line: **Welcoming *[employee name]* to *[company name/ department name]***

Hi all,

I'm excited to announce that *[employee name]* will be joining us as *[job title]* on *[start date.]*

[Employee's name] comes to us from *[company name/university name]* where *[he/she/they]* *[worked as/studied]* *[employment or academic background]*.
[He/she/they] will be working in our *[department name/team name]* and will be responsible for *[job description/job responsibilities]*.

Please welcome *[employee name]* to the *[company/team]*!

Best
[name]
[email signature]

Mandatory training announcement: In-person

What:	Mandatory training announcement
When:	First month
Recipients:	New hire
Sender:	HR
Brief:	To invite new hire to complete in-person mandatory training

Email subject line: **Training invitation: *[Name of training course]*. Save the date!**

Dear *[employee name]*,

We hope you're settling into your new role and new team. As part of your onboarding program, we're hosting a *[name of course]* on *[date]*, from *[start time]* to *[end time]*, and would like you to attend. Please save the date in your calendar. The training will take place *[location]*.

The goal of this training is to *[XYZ]*. After completing the course, you'll have learned how to *[skills/knowledge achieved]*.

It's essential that we all complete this training. By doing so, you can help create and maintain a *[fair/safe/ethical/compliant/secure]* environment for us all.

If you have any special requirements or adjustments, please let me know. Thank you in advance for your commitment to *[XYZ]*.

I look forward to seeing you there.

[name]
[email signature]

Mandatory training announcement: Live virtual training

What:	Mandatory training announcement
When:	First month
Recipients:	New hire
Sender:	HR
Brief:	To invite new hire to complete live virtual mandatory training

Email subject line: **Training invitation: *[Name of training course]*. Save the date!**

Dear *[employee name]*,

We hope you're settling into your new role and new team. As part of your onboarding program, we're hosting a *[name of course]* on *[date]*, from *[start time]* to *[end time]*, and would like you to attend. Please save the date in your calendar.

The training will take place virtually. An email with joining details (link and password) will be sent soon.

The aim of this training is to *[XYZ]*. And by the end of the course, you'll have learned how to *[skills/knowledge achieved]*.

It's essential that we all complete this training. By doing so, you can help create and maintain a *[fair/safe/ethical/compliant/secure]* environment for us all.

Thank you in advance for your commitment to *[XYZ]*.

[name]
[email signature]

Mandatory training announcement: Online, synchronous training

What:	Mandatory training announcement
When:	First month
Recipients:	New hire
Sender:	HR
Brief:	To invite new hire to complete online, synchronous mandatory training

Email subject line: **Training invitation: *[Name of training course]***

Dear *[employee name]*,

We hope you're settling into your new role and new team. As part of your onboarding program, you're invited to complete a *[name/topic of course]* course. This is an online course and will take approximately *[duration]* to complete.

The aim of this training is to *[XYZ]*. And by the end of the course, you'll have learned how to *[skills/knowledge achieved]*.

To access the training, please go to *[link/website]* and enter the following details:

○ Username: *[username]*

○ Password: *[password]*

To help meet our deadlines, please complete this course by *[date]*.

It's essential that we all complete this training. By doing so, you can help create and maintain a *[fair/safe/ethical/compliant/secure]* environment for us all.

Thank you in advance for your commitment to *[XYZ]*.

[name]
[email signature]

Invitation to log into the company LMS

What:	Invitation to log into the company's learning management system
When:	First week
Recipients:	New hire
Sender:	HR
Brief:	To engage new hire with the learning management system

Email subject line: **Log in now! Your L&D journey starts here**

Dear *[employee name]*,

Welcome again to *[name of company]*! We're really happy to have you with us.

As part of your onboarding, please make time *[today/this week/this month]* to log into our online training platform *[name of platform and hyperlink if appropriate]*, which you can use to manage and track all of your L&D.

To log in, go to *[insert link]* and *[sign in using your work email and password/create an account and password.]*

Finding your way around the platform should be straightforward. But, if you do have questions, you can call *[customer support number]*, email *[support email address]*, or refer to *[the user guide attached/user guide available online — insert hyperlink]*.

Best,

[name]
[email signature]

Conclusion

Keep calm and set up your onboarding strategy

Onboarding is the beginning of a (hopefully) long-lasting relationship with the employee. So, it's worth investing time, effort, and resources to make a great start. If you put your heart and mind into creating a seamless onboarding experience, from start to finish, it's certain that both you and the new hire will enjoy the process. Not just that, you will get to retain new employees, minimize turnover rate, and more.

The tips we have shared in this guide will help you plan your onboarding strategy from A-Z. From preboarding and onboarding best practices (at the office or remotely) to useful email templates you can leverage during the onboarding process, we've covered everything you need to know.

Finally, remember to check in with employees even after they've been onboarded. Ask for feedback so that you improve your onboarding strategy and make sure your new hires have everything they need to perform well in their roles.

Take employee onboarding to the next level with TalentLMS.

Create your free account and give your new hires a warm welcome.

Get started