

## 12 steps to effective onboarding

Prevent turnover with A+ onboarding.

Effective onboarding reaches past compliance and orientation to assimilate new employees into workplace culture and help them contribute to company goals. With a planned and polished onboarding process, you can keep employees productive and satisfied while also saving your company the costs associated with turnover.

Use the checklist below to **ensure your onboarding methods get an A+**.

### Every employee counts.

For an employee making \$40,000 per year, turnover can cost as much as \$20K-\$30K.<sup>1</sup> Meanwhile, companies that take a strategic approach to talent management see a **40% reduction in turnover.**<sup>2</sup>



### ✓ Before day one



#### Get a head start on paperwork to prevent information overload when the new employee arrives at the office.

- ✓ Set up the employee's workstation, including laptop, email, security badge, business cards, and phone. Put the employee's name on the cubicle or office door for a personal touch.
- ✓ Send the employee office directions, a first-week orientation schedule, a handbook, and any paperwork needed for day one. Consider including a map of the office and even staff bios and photos to aid in familiarity with new names and faces.
- ✓ Engage the entire team in onboarding. Announce the new hire with an all-staff email, and assign a peer "buddy" for an unfiltered experience.

### ✓ During day one

#### With paperwork out of the way, use the first day to acclimate the employee to a new role and company.

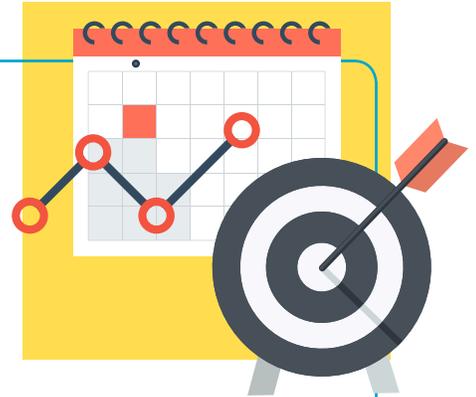
- ✓ Greet the employee in the lobby and provide a tour of the office. Introduce coworkers as well as possible mentors and other key people.
- ✓ Give the employee an orientation packet and a gift bag with product samples and company swag.
- ✓ Sit down with the new hire and manager to discuss the role and answer any questions.



## ✓ After day one

### Check in at several key milestones to head off issues and keep morale high.

- ✓ During week two, ask the employee to envision a future with the company by listing goals and creating a timetable for reaching them.
- ✓ On day 15, have the new hire's manager meet with him or her to discuss progress and resolve any concerns.
- ✓ At 30 days, send a survey about the onboarding experience and confirm the employee is involved in both short- and long-term assignments. (But avoid introducing projects that could prove overwhelming.)
- ✓ About 20% of turnover occurs around the 45-day mark.<sup>3</sup> At this point, meet with the employee individually to discuss satisfaction with the role.
- ✓ At 90 days, ask the employee for ideas for improvements. Make sure the manager is providing affirmation and constructive feedback.
- ✓ Keep checking in—successful onboarding starts during recruiting and extends through the first year.



A+



**Don't worry if you forget to complete every single task above. Simply having a plan shows employees that your company cares about them and their careers.**

## Automate onboarding tasks. Focus on employees.

With features like new employee portals, the ability to coordinate forms, and task management functions that facilitate communications across departments, an onboarding solution can free up your time to focus on new hires—not their paperwork.

Whether it's a software-as-a-service model, a standalone solution, or an add-on to another system, your onboarding solution should:

- Be affordable and flexible.
- Require little internal maintenance support.
- Take no more than six months (and preferably only a few weeks) to implement.
- Be customizable to reflect your company's brand.
- Allow you to tailor the process to each individual's job type and location.

Add-on integrations may even help you:

- Order business cards.
- Compare benefits.
- Conduct background screenings.
- Verify employment records.
- Integrate with other HR systems for online learning, video streaming, and social networking.

**To learn about the onboarding solutions offered by Sage, call 866-996-7243 or visit: [www.sage.com/us/need/human-resources-and-payroll](http://www.sage.com/us/need/human-resources-and-payroll)**



1 Source: <http://www.zanebenefits.com/blog/bid/312123/Employee-Retention-The-Real-Cost-of-Losing-an-Employee>

2 Source: <http://www.berstein.com/blog/post/2012/01/The-Business-Case-for-Talent-Management-Steve-Ballmer-Agrees.aspx>

3 Source: "The First 90 Days," December 2015/January 2016 issue of HR Magazine