



# entreQuest ONBOARDING BLUEPRINT

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## Why Onboarding is Important

Research from the Whyhurst Group found that “22 percent of staff turnover occurs in the first 45 days of employment.” Additional research shows that about half of all senior outside hires fail within 18 months and nearly half of all hourly workers quit within the first 120 days. Therefore, it is safe to say, that the first 30 days of employment are the most important in the life cycle of the employee for making a good impression. This is why entreQuest defines onboarding as the first month of employment for a new hire.

The onboarding programs offered to new hires vary greatly from company to company. Some companies have a one-day, classroom style program that has all of the “need to know” items in a binder. Some companies formulate a plan for one week of shadowing. Sadly, some organizations we’ve worked with have no onboarding plan and the new hire is just thrown in—the sink or swim mentality.

There are several wrong assumptions that leaders make about onboarding new hires. Usually these assumptions drive their actions (or lack thereof) for creating meaningful onboarding programs for their new hires.

- All of our past hires just “got it”.
- When you hire someone with experience or someone who is high-level, they should be able to figure it out on their own.
- My team will train the new hire.
- The new hire can just watch and learn.
- One day of training is enough.
- We have a binder full of our company’s information; that is enough.

Making these assumptions will lead to a less than ideal employee experience during the onboarding process. The leaders that value and understand the importance of a solid onboarding program have notably better success with new hires. In fact, the Human Resources Corporate Leadership Council found that increasing an employee’s level of engagement could potentially improve performance by 20 percent and reduce the employee’s probability of departure by 87 percent!

### ***Onboarding:***

#### *noun*

1. the induction and assimilation of a new employee into a company or organization
2. the management of the early stages of a relationship between a business and a customer

## Creating a REMARKABLE Program

There is much to consider when developing an onboarding program. Whether you are a C-level Executive, an HR resource, or a team leader, understanding where to start can be overwhelming and confusing. To begin, answer the questions below:

### *Company Overview/High-Level*

- What are the outcomes you are expecting from your onboarding program?
- What is the company vision and how will you integrate that into the onboarding program?
- What are the company values that we want the new hire to understand and live?
- What does a new hire need to know about the culture?

### *Onboarding Team*

- Who is the internal team that will be responsible for onboarding?
- How will you hold the internal team accountable for ensuring a remarkable experience for the new hire?
- What role will the new hire's supervisor play in the onboarding process?
- For more information regarding the Onboarding Team & Topics to cover, please see Appendix A.

### *About the New Hire*

- What impression do we want him/her to walk away with after day one, week one, at the end of the month?
- What tools and supplies will the new hire need?
- What are his/her goals and milestones for this 30-day period?
- How will his/her success be measured and how frequently?

### *Other Questions*

- How will we gain feedback about the onboarding program?
- Is there a place (ideally online) to keep onboarding details, documents, etc.?

Once you are comfortable with the answers to these questions, you can begin to create the perfect onboarding program. Every organization is different and the success of your onboarding program may be based on trial and error. Keep in mind, the more you plan and prepare, the better your outcome will be. The guidelines outlined on the following page can help you to ensure a successful program.



## Five KEYS for a REMARKABLE Program

**1. Plan NOW:** Planning should begin as soon as the offer letter is signed (if not earlier). Past that, there are a few things we highly recommend you do first:

- The Onboarding Team should send an email or call the new hire to welcome him/her to the team. The positive feeling that results from this is worth the time it takes.
- The Onboarding Team should schedule all meetings with the new hire in advance of his/her start date, thus providing him/her with certainty that the first few weeks will be filled in a productive way. A prepopulated calendar will decrease FUD (fear, uncertainty, and doubt) for the new hire, thus reducing anxiety. See Appendix A for an example of topics.
  - The first two weeks of onboarding will most likely be meeting intensive with the third and fourth week including more study and shadowing
- A ready workstation should be provided, including: computer, business cards, a card, balloons, flowers, etc. The new hire's desk should reflect celebration and thorough preparation for his/her arrival.

**2. Assign a Point Person:** The point person is a set member of the onboarding team that the new hire can depend on to help mentor him/her through the first few weeks. The point person should act as an ambassador for the company and should have an extremely positive outlook on the company and his/her own personal contribution.

**3. Integrate ASAP:** Ideally, the CEO or leader of the company would do a kick-off meeting with the new hire to discuss: the vision, the values, and the culture. Past this, there are a few additional ways to help integrate the new hire into the culture:

- Have the onboarding team take the new hire out to lunch for the first week.
- Schedule people from other departments to meet with the new hire to: share what they do, how long they've been at the company, and what they love most about the company.
- Onboarding should be fun—fun could include aforementioned lunches or team building exercises.

**4. Be Creative:** Everyone learns and retains information differently. Information relayed should have a great deal of variety in terms of how it's communicated and appeal to all personality types and all learning styles. At entreQuest, we teach 4 personality types (see Appendix B) and suggest multiple learning modes, such as: online learning, classroom style immersion, shadowing, and self-study.

**5. Make Progress:** Progress is critical in making the new hire feel that his/her impact is positive and valuable. Progress must be measured. Milestones and deadlines should be determined prior to the new hire's start date. A new hire, like current employees, want to feel as though he/she is able to contribute to the team, as quickly as possible. Through measuring progress, the new hire is easily able to pin-point his/her contribution.



**Plan  
NOW**



**Assign  
A Point**



**Integrate  
ASAP**



**Be  
Creative**



**Make  
Progress**

## Final Thoughts

Once the new hire has completed onboarding, he/she should:

- Understand and begin to live the vision, mission, values, and culture of the organization.
- Feel ready to start producing and adding value to the company.
- Be confident in his/her ability to add value quickly.
- Understand where they fit within the culture and have a strong foundation of people to trust.
- Be excited to have chosen the organization.

## Feedback

Sometimes onboarding programs do not go as planned. It's important that you, as the leader, hold your team accountable and check-in regularly with the new hire on his/her mindset and belief system. One way to measure your progress as a leader relative to putting together a remarkable onboarding program, is to survey new hires after the first 30 days. Some of the questions you can ask that will provide valuable insight are:

	Strongly Agree	Agree	Somewhat Agree	Somewhat Disagree	Disagree	Strongly Disagree
1. I felt welcomed at Company X.	<input type="radio"/>					
2. The onboarding program helped me successfully transition into the organization.	<input type="radio"/>					
3. The tools and resources I needed were ready on my first day.	<input type="radio"/>					
4. I learned about the vision, mission, and values of the company quickly.	<input type="radio"/>					
5. My manager played an integral role in my transition.	<input type="radio"/>					
6. The job expectations and goals were clearly set for me during the onboarding process.	<input type="radio"/>					
7. Having a point person assigned to me during the onboarding period was helpful.	<input type="radio"/>					
8. The point person assigned to me during the onboarding period was a good fit with my personality and work style.	<input type="radio"/>					
9. I feel ready and confident to continue my employment with Company X.	<input type="radio"/>					
10. I would rate the onboarding program remarkable.	<input type="radio"/>					
11. Please add any suggestions you have that can help us improve the program for future hires.						

The goal with any new hire is to ensure he/she understand and lives the company's vision, mission, and values consistently in order for the company to retain the employee long-term. In addition to the first 30-days, having a great system of management in place for the employee as he/she goes through the employment journey is also critical for retention.

Appendix A: Onboarding Team & Topics

Onboarding Team: Roles & Responsibilities									
<b>Company X 101</b>		<b>Owner</b>		<b>Role X 101</b>		<b>Owner</b>		<b>Onboarding Team</b>	
HR Manual				Roles & responsibilities				<b><i>Name / Position</i></b>	
Performance Stds				Goals: milestones & metrics				Employee Y	
2014 Plan				Current client overview				Employee X	
Vision				Defining success				CEO	
Story				Teammates					
Values & Behaviors				Other Departments/Teams					
System of Management									
Client engagement process									
<b>HR paperwork</b>		<b>Owner</b>		<b>Processes</b>		<b>Owner</b>		<b>Self Study</b>	
Insurance				Time Tracker				Online courses	
Dental				Sharepoint				Books to read	
Vacation policy				Email/calendar				Articles to read	
Tax forms				Lync				Information to research	
Direct deposit				Contracts					
Copy of license				Expenses					
401K									

## Appendix B: Four Personality Types



### SHARK

- The hard-driving, in-your-face, results-oriented people.
- PRIMARY MOTIVATORS – money, recognition, and significance



### OCTOPUS

- The organizational, data-drive people
- PRIMARY MOTIVATORS – facts and information



### WHALE

- The more charitable, let's-do-what's-best-for-the-greater-good type people.
- PRIMARY MOTIVATORS – helping others and making a difference



### DOLPHIN

- The playful people who always want to have fun and want others to share in it.
- PRIMARY MOTIVATORS – enjoying the ride all along the way.

Please note that everyone has a little of each personality in them. It's more a question of which type is dominant. Some have one category that is clearly dominant, where others have two or three that are close in dominance.

The secret to great relationships is the ability to understand others, recognize what motivates them, and know enough to realize that you don't have to act like them—you just have to understand the behavior and respond accordingly.

In terms of onboarding new hires, we're talking about understanding a new employee's personality type and being able to present to them in a way that promotes enrollment in your business' mission, vision, and values. If you know what is important to your employees, you can present it and forward the onboarding process faster and more efficiently.