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Onboarding and Beyond

A comprehensive guide for a successful and impactful onboarding journey



White Paper

Table of Contents

1. Employee onboarding and it's significance — 3
2. Objectives of employee onboarding — 4
3. Where does onboarding begin? — 6
4. How long should onboarding employees take? — 7
5. Key parts of a successful onboarding process — 9
6. Resources and checklists for onboarding — 12
   - Standard onboarding elements — 12
   - Individualized onboarding elements — 12
7. Ready-made onboarding email templates — 13
   - Welcome email — 13
   - Introduction email — 13
8. Best practices in employee onboarding — 14
9. Facebook's 45-minute rule — 15
10. Onboarding automation — 16
    - Importance of employee onboarding software — 17
    - Solving HR Onboarding challenges with Cloud HRMS — 17
    - Role of onboarding software in the recruiting process — 18
    - Automating the onboarding process with onboarding software — 19
11. About keka HR — 20

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CHAPTER-1

Employee Onboarding and its Significance

Employee onboarding is a critical phase where new hires familiarize themselves with the organization, its people, and its culture. It involves introducing them to the company, integrating them into their roles, and providing the necessary resources. They could meet colleagues, learn work processes, and understand the company's mission and values. The goal is to empower employees to perform their jobs independently and as quickly as possible.

Onboarding serves two essential purposes:

- Accelerating new hires' productivity and competence in their roles.
- Enhancing the company's ability to shape new employees' initial impressions.

Impact of good onboarding on employee experience

Improved retention

Replacing a departed employee is costly in terms of recruitment expenses and productivity loss. However, a well-executed onboarding process increases the likelihood of new employees staying longer. Effective Onboarding sets employees up for success by helping them adapt to their roles and achieve their targets.

Structured onboarding boosts employee retention by **58%** after three years.

Increased productivity

When a new employee joins an organization, whether as a direct replacement for someone leaving or for a completely new role, it is essential to invest time in getting them up to speed.

62% of companies achieve faster time-to-productivity with effective onboarding.

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Boosts employee morale

Effective Onboarding is crucial for creating a positive new employee experience, making them feel valued and appreciated. Employees gain a clear sense of direction and purpose if they are provided with a well-structured onboarding plan, fostering a stronger connection with the team and increasing their long-term commitment to the company.

Improves the company's branding and reputation

A streamlined onboarding process contributes to the satisfaction and comfort of new hires, increasing the likelihood of them sharing positive experiences with others. Companies can encourage new hires to provide feedback and share their onboarding experiences from the initial days. This feedback loop helps companies continuously improve their onboarding practices.

CHAPTER-2

Objectives of Employee Onboarding

Ensuring adherence to legal regulations

Implementing a well-structured process for compliance tasks is essential for everyone, as it helps reduce the time required for such activities. By streamlining administrative tasks, the HR team can minimize its workload and allocate more time to the critical aspects.

Creating a genuine feeling of belonging

New employees often feel like a fish out of water. When they feel belonged, they are more committed to the company and can focus on their work better. Establishing a strong connect with their teams in the early days would make collaboration easier in the future.

Making it easy for HR to manage new hires

Each new employee means more administration for the HR team. For fast-growth businesses that are bringing in new employees on a weekly basis, the admin load can be enormous. Automating and streamlining onboarding would help reduce this burden and ensure redundant tasks are put in an auto-pilot mode.

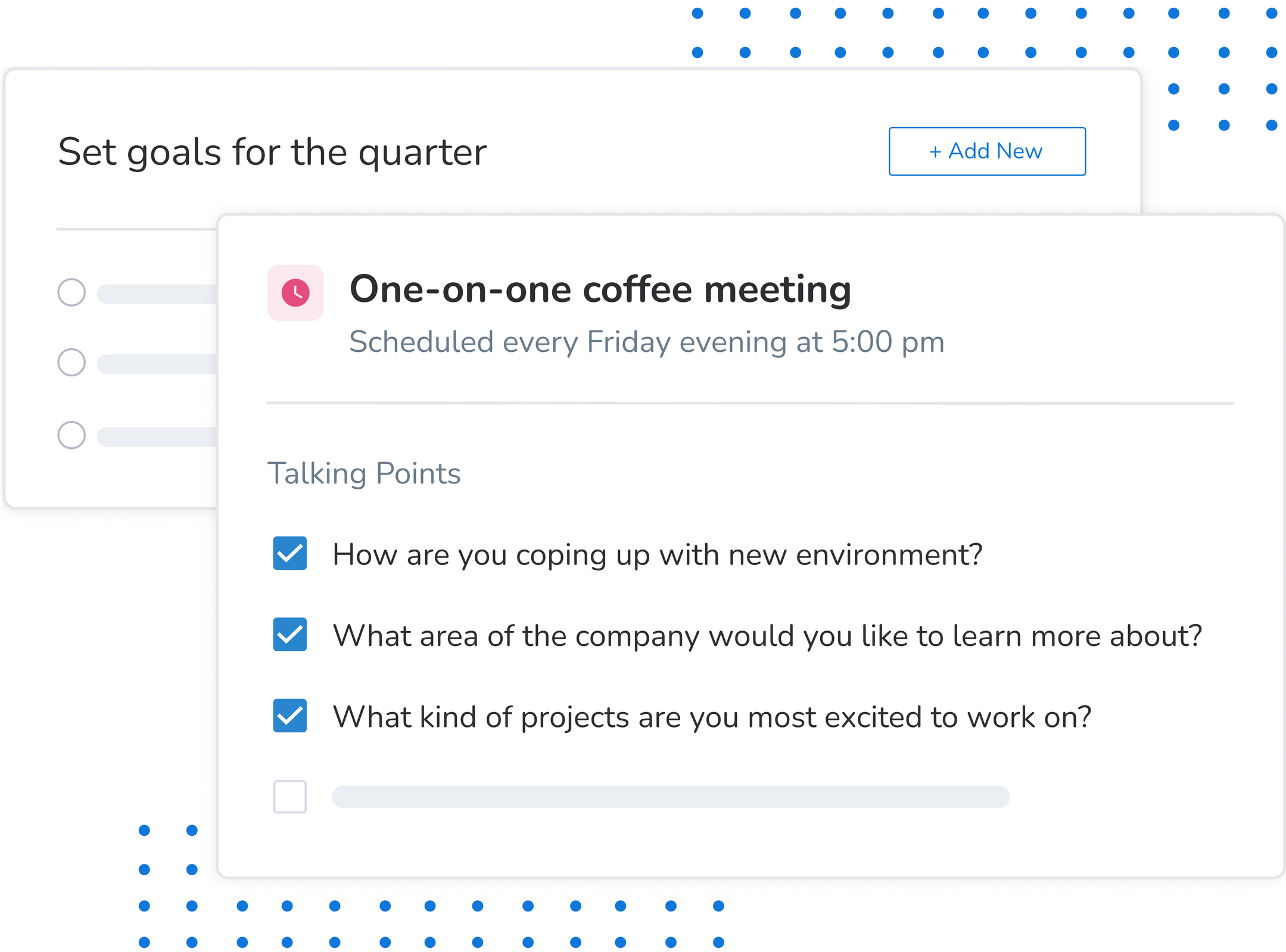
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Improved time to productivity

Effective onboarding includes timely training to make employees more productive and contribute to the business at the soonest. This will also ensure they don't feel stagnated.

Better retention of new hires

The hiring process is expensive - in terms of person hours and money. Losing embedded members of the team can be destructive to company culture. For both of these reasons, you want to keep down employee churn.



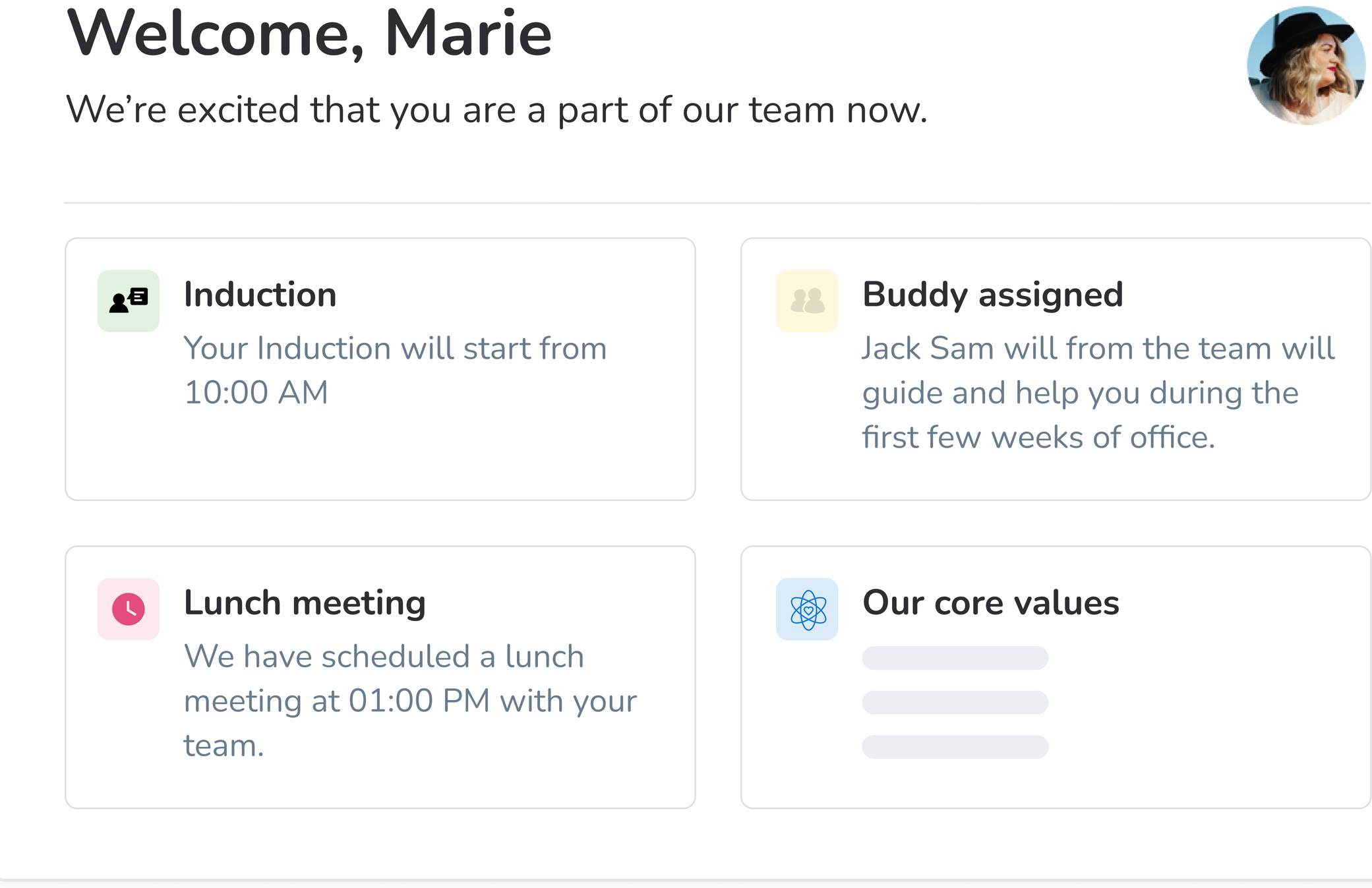
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Where Does Onboarding Begin?

An important consideration is determining the starting point of the onboarding process. Onboarding actually begins when the interview concludes. It entails an active engagement process that spans from recruitment, continues throughout the candidate's first day, and extends beyond, atleast till their probation has ended.

It's crucial to recognize that new hires are already mentally and emotionally invested in the company from the moment they apply and start envisioning themselves in the new role and team. Your responsibility is to ensure that their emotional investment is well-placed and nurtured. While there are general principles to follow, it's important to remember that Onboarding is not a one-size-fits-all approach.



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How Long Should Onboarding Employees Take?

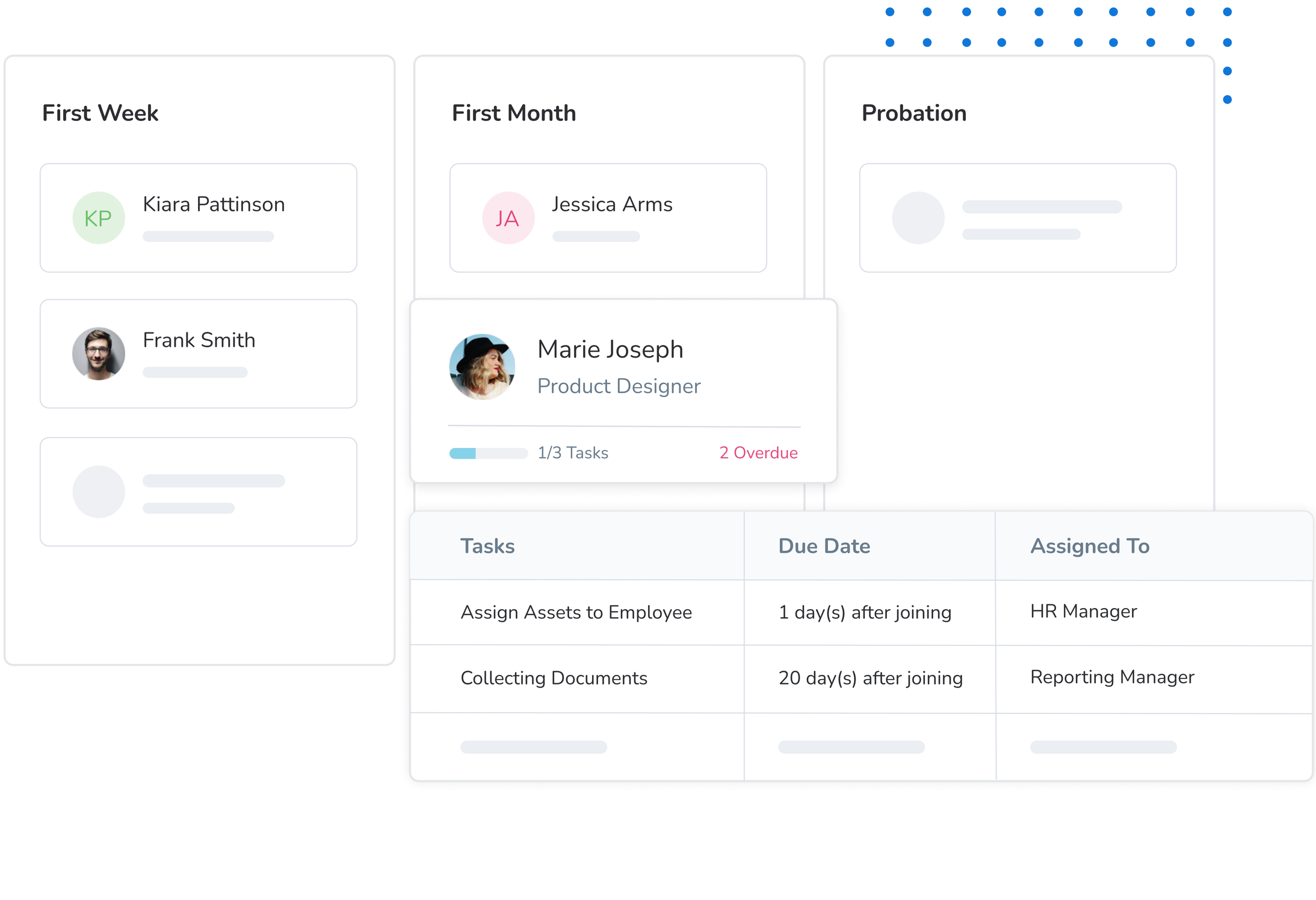
Human resource experts recommend a minimum onboarding duration of 6 months for new hires and 3 months for senior professionals. Extending onboarding to the first year significantly improves employee retention and engagement. While onboarding procedures vary, there are general guidelines to enhance engagement, retention, and overall success.

Standardized onboarding boosts new hire retention by 50%, while a great onboarding experience increases the likelihood of employees staying for three years by 69%.

However, many businesses still struggle to deliver a satisfactory experience. New hires often face over 50 tasks, mainly paperwork and administrative hurdles.

Alarmingly, nearly 60% of organizations focus on processes and paperwork in their onboarding programs. Only 37% have programs that go beyond 30 days.

Developing an effective onboarding strategy and timeline requires effort. But the benefits of retaining new hires and high-performing employees make it worthwhile.



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The Pre-Onboarding Stage

As mentioned earlier, the actual onboarding starts much before the actual joining date of an employee. The key here is to maintain a constant stream of communication to not only engage with the new hire but also instill in them a sense of belonging. A great onboarding team will always be ready to answer questions and clarify queries whenever a new hire approaches them.

Sending a Welcome Kit

A welcome kit could be shared on the day of joining as well. However, what the kit comprises of is more important than when you share it. Quite often, organizations spend a hefty amount of money in gifting gadgets and goodies to the new hire. However, more important than those is:

- Logistical information related to their first day. Even basic things such as information about vehicle parking could make a huge difference.
- Information related to required forms and documents
- Information about the vision and mission of your company
- Information about the projects the new joiner will be working on or work samples or examples related to what they would be taking up

Enrolling the new joiner in standard onboarding courses

If you don’t have them, maybe you need to set them up. Standard or centralized onboarding courses mainly talk about organizational culture and processes. If your company is not big enough to build such courses, you can rope in an existing employee who has a great understanding of the culture so that they can convey the same to the new hires.

Preparing the workspace with the required resources

Nothing portrays lack of professionalism than making a new joiner wait for basic work equipment such as laptops or a work desk. Apart from the equipment and devices, you would also have to make sure they have access to the required tools such as collaboration platforms.

Let their team know in advance

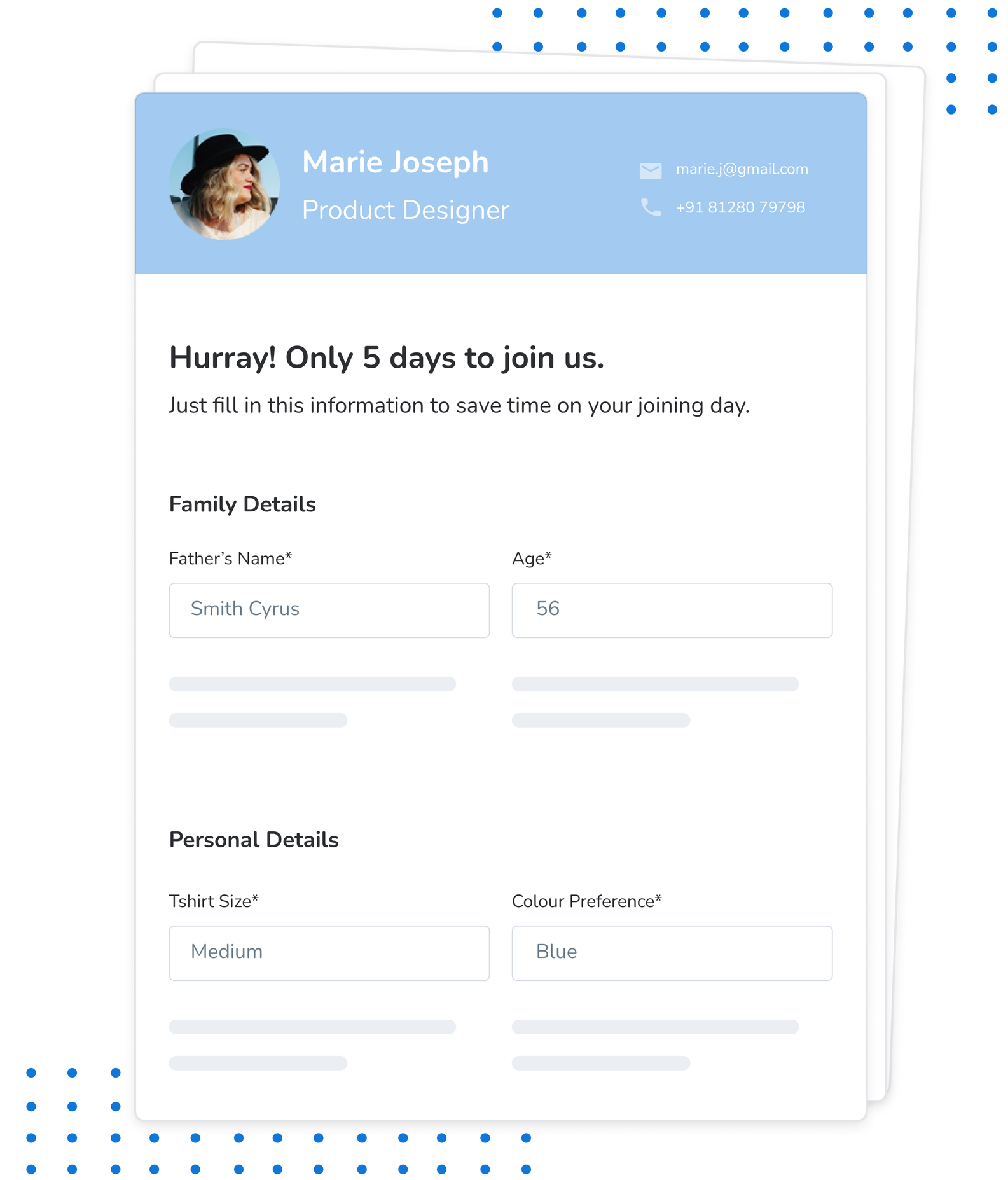
As an HR professional, not only would you have to inform the teammates of a new joiner about their joining date, you would also have to encourage them to welcome the new hire warmly.

Get the boring documentation work out of the way

Let’s say it openly! Documentation work is something that is taxing. You don’t want the new joiner spending their first day filling in forms or scanning documents. You can get this out of the way days before they join, during the pre-onboarding phase.

You can use tech and cut the mundane processes by allowing the candidate to fill and submit the information days ahead of their joining, so the candidate can spend his/her first day getting familiar with the workplace, team, and leadership.

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Key Parts of a Successful Onboarding Process

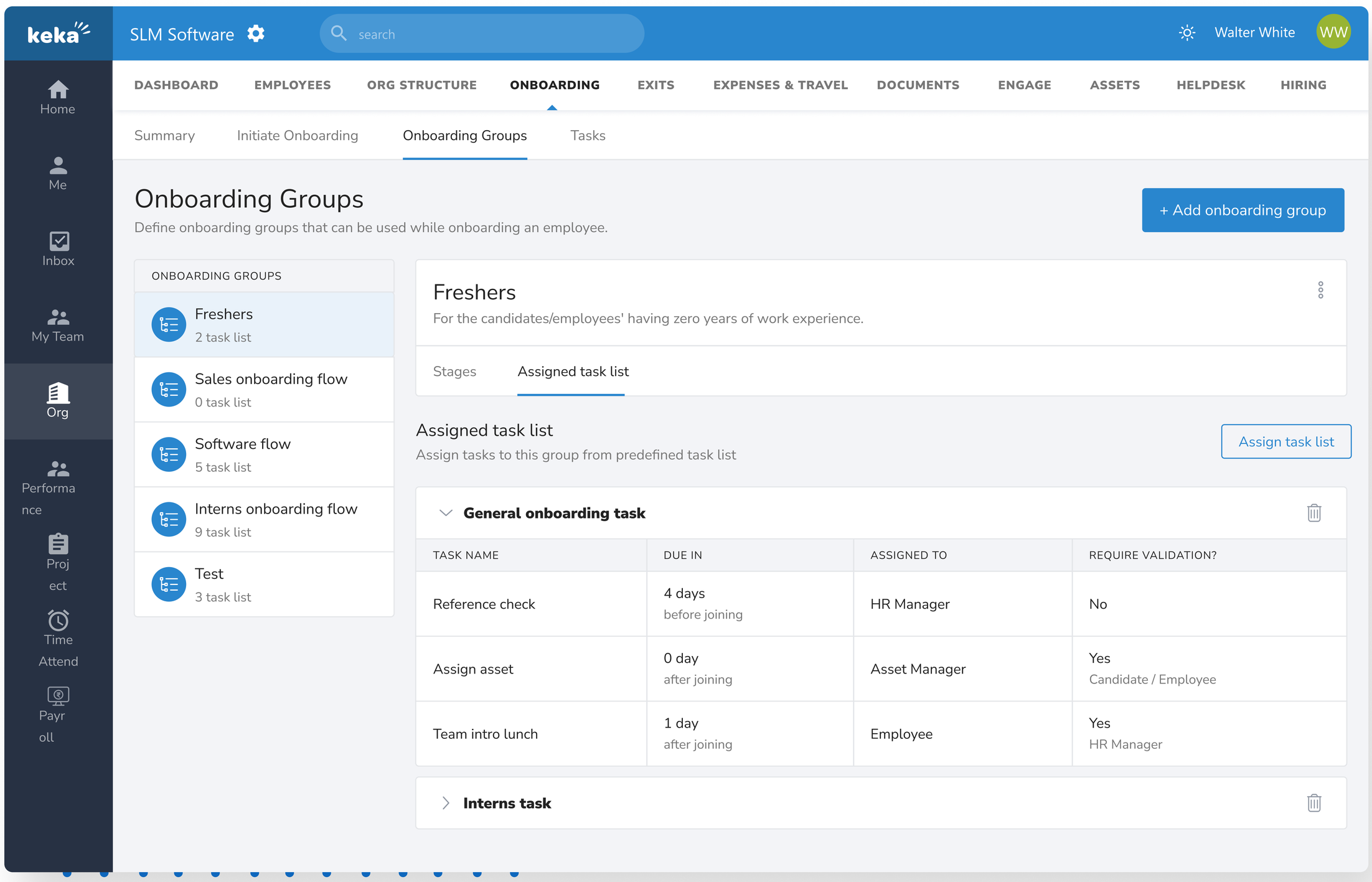
A well-managed onboarding program is characterized by careful planning and coordination. It's essential to remember that onboarding is not a one-size-fits-all approach. Depending on their career level, job function, and geographic or cultural background, different employees will require tailored onboarding techniques for successful integration.

While onboarding programs vary across organizations, several vital aspects are present in all well-managed onboarding programs.

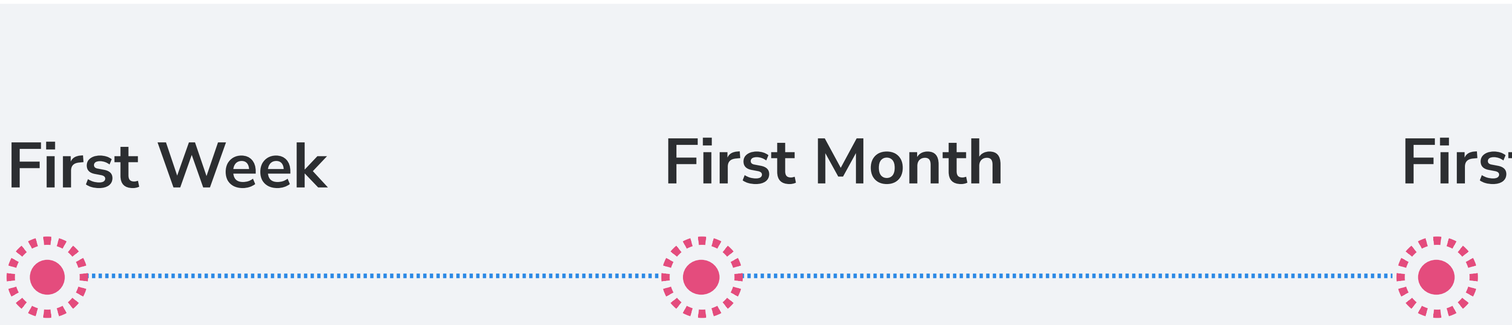
One crucial aspect of a successful onboarding program is prioritizing the new hire's experience. The onboarding process should be enriching yet straightforward. To achieve this, onboarding requirements such as forms and manuals should be presented in a self-explanatory task-driven workflow.

In addition to this, successful onboarding programs:

- Provide clear, concise, and consistent channels of communication
- Personalized onboarding for employees of different experience levels
- Facilitate learning at every organizational level
- Set the objectives for 30, 60, and 90 days
- Align new hires to crucial business strategies
- Set milestones to gauge new hire success
- Present information in easily digestible amounts
- Reinforce the employment brand and other positive aspects of the company culture
- Provide the employee with both standard onboarding elements and individualized onboarding elements
- Encourage the employees to engage with relevant stakeholders and cross-functional teams they'll be working with regularly



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The first week of a new hire

The first week of a new joiner will require you to put into action more or less the activities you had planned during the pre-onboarding period. Some of them are:

- Celebrating the new joiner's arrival
- Ensuring they are introduced to their team members
- A tour of the office or campus facilities
- Apprising them of the onboarding objectives, schedule, and timelines for the first few months
- Informing them about the basic workflows, names, titles and backgrounds of their team members. Also important is to provide them with online or offline sources as needed and suited for their job roles
- A clear explanation of their first assignment
- Providing them with an overview document related to the performance review process

The first month of a new hire

While the first week will mostly involve the basics, the next three weeks would require you to help the new employee dive deeper into their work. You would have to:

- Explain to them how their work contributes to the accomplishment of organizational goals
- Assign a mentor or a work buddy to help the new hire get familiarized with the company's work and culture
- Create a networking plan between the new joiner and all the people they would be working with directly or indirectly

The end of the first three months

At the end of the first three months of the new hire, you would have to set up an informal performance review where they could discuss their performance with their reporting manager. The review should be scheduled only when the manager has enough inputs and time to gauge the new hire, but also early enough so that the new joiner could change their behaviors if needed, before the formal review.

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CHAPTER-6

Resources and Checklists for Onboarding

Standard Onboarding elements

At a macro level, many elements of the onboarding process are relatively standardized. For example, everyone in the company must complete the general paperwork and company training. New hires must be prepared with an understanding of how the organization operates. Such standard elements may include:

- Company values, mission, and culture
- New hire paperwork
- General company-wide policies and procedures
- Important-to-know people and organizational chart (CEO, VPs and Directors.)

Individualized Onboarding Elements

The micro-elements of the best onboarding programs include items specific to the employee's department, function, and location. To help understand why these matters, think briefly about the differences between departments of a well-known organization, such as a automotive giant. In such a scenario, would it make sense to onboard a person to the finance team like one would onboard a mechanic?

Some examples of elements included in an individualized onboarding program include:

- Department or work location culture
- Explanation of how the new hire's function fits into the overarching company strategy and goals
- Measurable managerial expectations and goals
- Key departmental processes
- Important-to-know people (manager, mentor, buddy, team members)
- Customized learning plan and objectives

Download these ready-made checklists with which you can ensure that the Actions and Stakeholders are aligned:

Job Requisition Checklist
New Hire Training Checklist
Interns Onboarding Checklist
New Hire Paperwork Checklist
New Hire Preboarding Checklist
IT Onboarding Process Checklist
New Manager Onboarding Checklist
New Hire Orientation Program Checklist
Remote Employee Onboarding Checklist

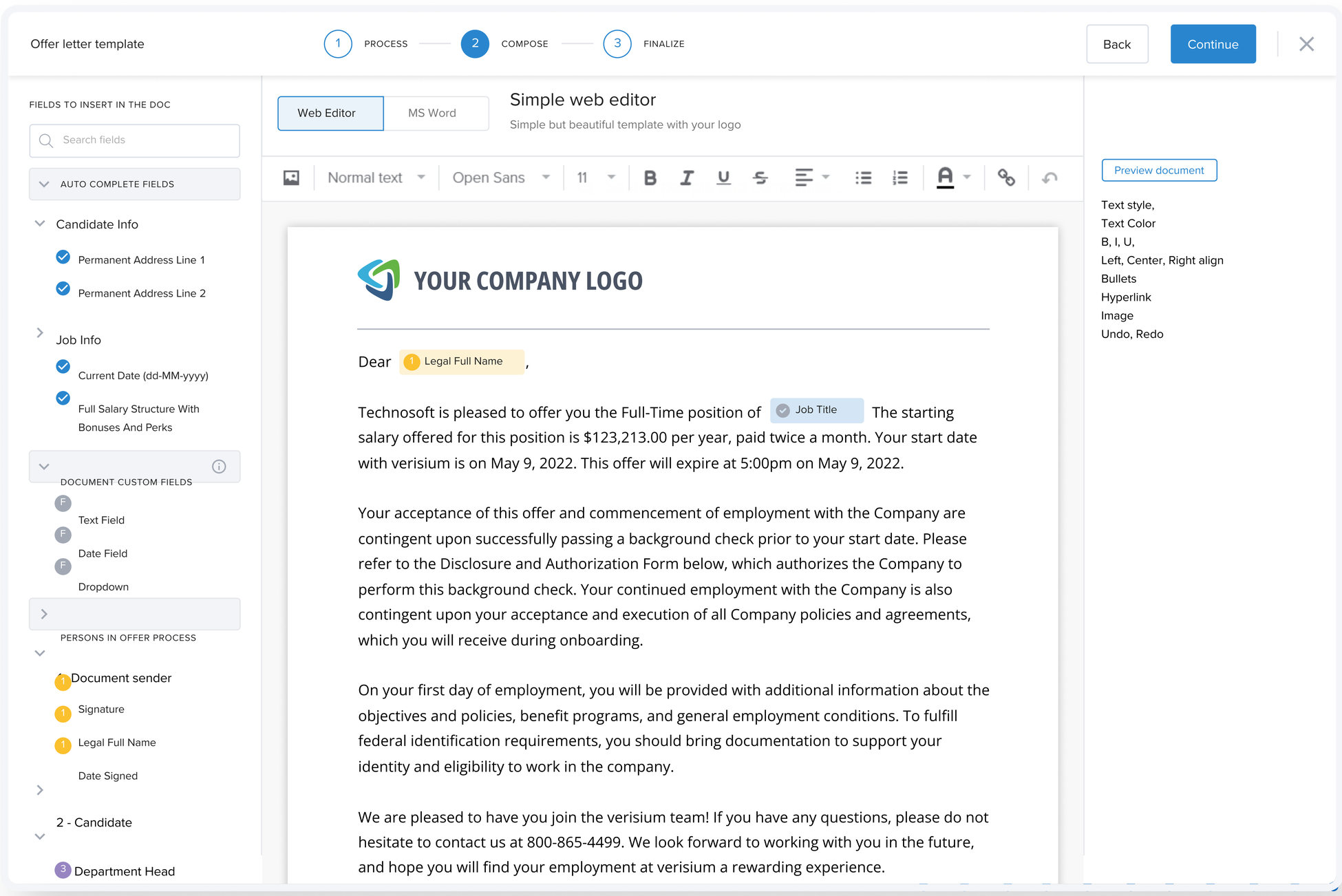
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CHAPTER-7

Ready-made Onboarding Emails

Welcome email

When to send: A week before the new employee starts
Whom to send it to: The new hire
Whom to CC: Their hiring manager
Who sends it: HR Ready-made
Subject: We're looking forward to having you as part of the team



Introduction email

When to send: On the day of joining
Whom to send it to: The whole department/company
Whom to CC: The new hire and the CEO/leadership team
Who sends it: The hiring manager
Subject: Let’s welcome [employee's name] to the team!

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CHAPTER-8

Best Practices in Employee Onboarding

Here are a few onboarding best practices that will help you inspire new talent:

- Set candidates up for success before their first day with a strong onboarding program. Preliminary training, paperwork, introductions, and familiarization with your culture and values can all be done before your new hire's joining date.

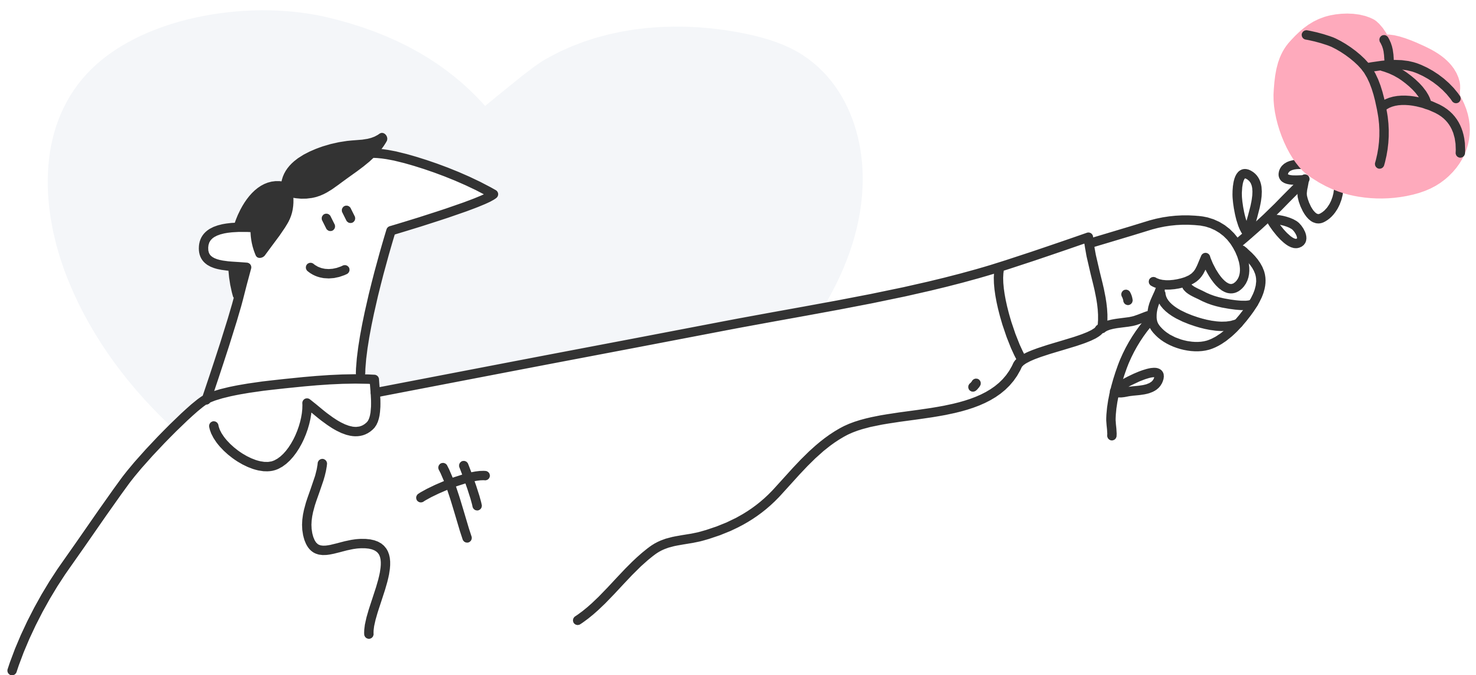
- Continue building on the trust and rapport between your recruiters and job seekers. Onboarding smooths the transition from being a candidate to an employee, increasing productivity early and the likelihood that new hires will stay longer.

- Focus on your organization's culture and values. Your new hires spent much time talking to your recruiters about what it's like to work for your company. Onboarding is the time to reinforce and reassure them that they made the right choice. Show new hires what approach and values will help them advance and contribute to your company.

- Make it easy for new hires to learn more about your organization and find answers to commonly asked questions. Use an onboarding portal to include information on your company, its teams, role, products and services, benefits, upcoming events, and first-day logistics, such as what to bring and where to park their vehicle.

- Include recruiters and hiring managers in the onboarding experience. According to a Harvard Business Review report, 40% of adults feel lonely at work. Friendly faces should appear throughout onboarding, including new hire onboarding groups.

- Ensure everything – laptops, onboarding packets, paperwork, training resources, etc. – is ready for new hires on their first day. Your business' level of preparedness sets the right tone about focus, productivity, efficiency, and expectations. This is even more critical for remote employees.



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CHAPTER-9

Facebook's 45-Minute Onboarding Rule

According to Tim Campos, Facebook's chief information officer, after walking through the doors on their first day, Facebook employees are productive within 45 minutes.

Campos suggested that an inability to enable employees to become productive in that time is indicative of a failure on the part of a department. With a high hiring rate, he said it is imperative that Facebook, as an organization, carries out an incredibly efficient onboarding process.

So how does the company accomplishes this 45-minute rule?

First, a bit of planning. Campos said you need to calibrate all systems and devices- from an employee's PC to their phone- before new hires even report for their first day.

Second, rather than focusing on abstract talks about what a new employee can do, you should get the new employee well-versed in the practical aspects of the job, including how to set up a meeting and where the printer is.

"And then you're off on your way," Campos said. "If we're successful, then you know exactly where to go to get things done."

"Onboarding is everyone's responsibility"
This is an often-used phrase in organizations, but without actionable items and accountability, onboarding programs will never succeed.

Campos also revealed some exciting recruiting practices.

Campos said that Facebook has a record of every single interview that's taken place at the company. Analysts correlate this date with performance reviews that employees receive every six months, and this helps Facebook identify signals during interviews that can be used to indicate whether or not someone will be a strong hire.

"For example, we look at our sales organization," Campos said. "We found that the most effective salespeople have some entrepreneurial experience in their background. This highly correlates with high performance within the company."

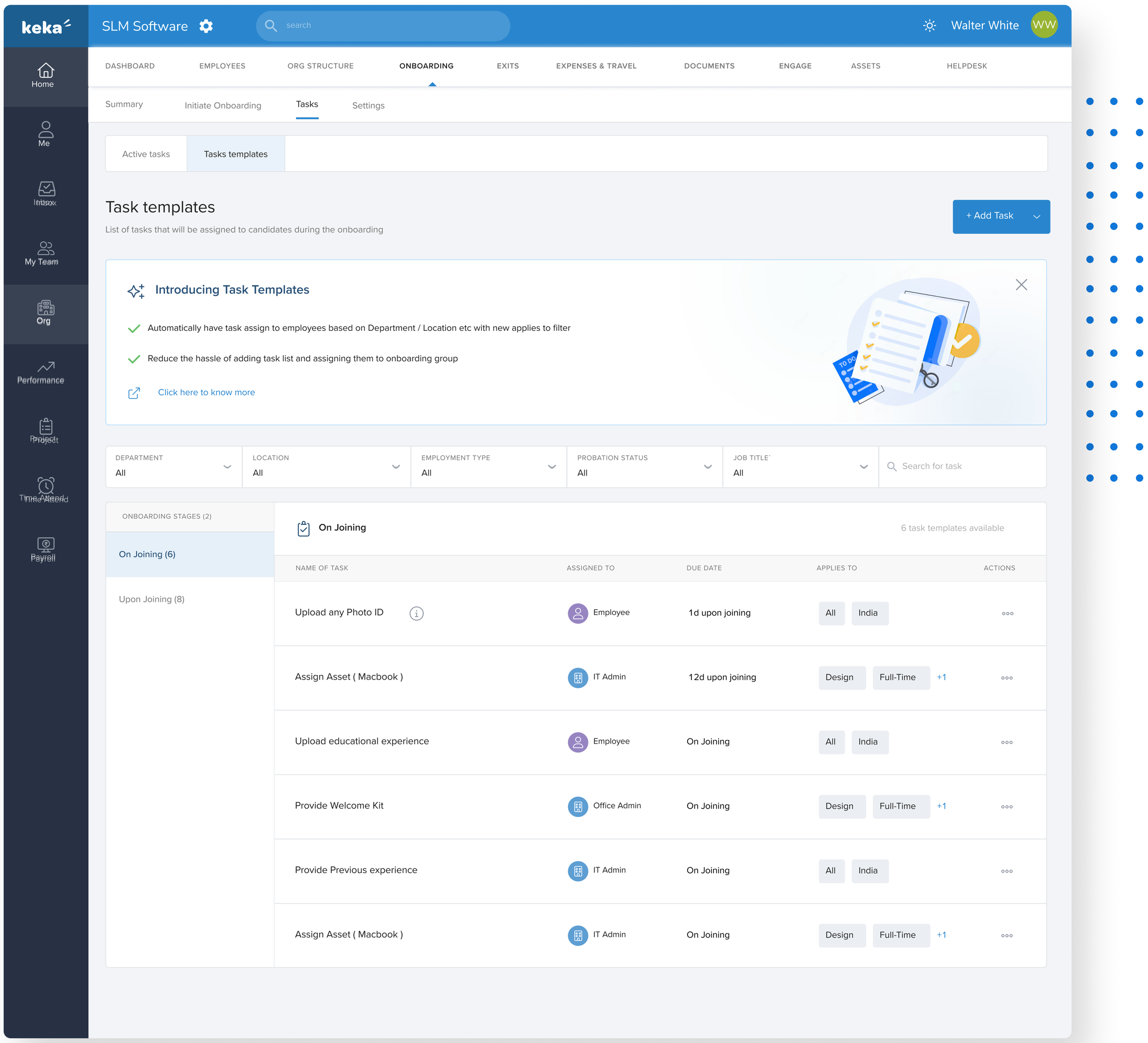
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CHAPTER-10

Onboarding Automation

Onboarding is slow and error-prone when it's manual and exists in a silo. Automated onboarding speeds up workflows, eliminates busy work for recruiters, and facilitates communication between HR, Finance, IT, hiring managers, and individual teams.

This ensures new hire tasks get assigned and accomplished before new hires arrive by providing everything like laptops, onboarding packets, paperwork, and training resources. – is set up and ready for new hires on their first day; you set the right tone about focus, productivity, efficiency, and expectations. Additionally, new hires have everything they need to hit the ground running.



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Why is employee onboarding software essential?

Many organizations need help with onboarding and with hiring in general. Companies that hire seasonal employees must move through the onboarding process quickly and efficiently. Organizations with a high turnover rate, such as the retail industry, must be able to fill roles quickly and reduce their time to reach productivity as much as possible.

Employee onboarding software helps by automating the burdensome tasks that get in the way of the actual work of onboarding, such as verification documents. It creates a clear list of tasks that must be completed, so every stakeholder can clearly understand where each new employee is in their process.

More importantly, this type of software provides the HR team and the new employee with a transparent and standardized process for incorporating new employees, which saves time and creates a consistent experience for everyone in the company. With a standardized approach, the company can collect data on the onboarding process to spot trends and make incremental improvements. It's also more accessible for the new employee, as they can rely on the software to guide them through their experience.

Most onboarding software help with compliance obligations as well. The best solutions include tools for the automated preparation, signing, and management of government forms. This reduces risks and ensures that no documents or important information is lost.

Where does onboarding software fit into the recruiting process?

Employee onboarding software almost always comes into the picture toward the end of the recruiting process after a candidate has been hired by the company. Once an applicant has been accepted, their information can be transferred or imported into the onboarding software so they can begin their onboarding journey.

Usually, employee onboarding software integrate with other human resource management systems, such as:

- Payroll
- Benefits management
- Performance management tools

With the right solution, companies can even integrate their onboarding software with their recruiting tools, enabling a seamless transition from candidacy to onboarding.

Best-in-class onboarding software include easy-to-use templates for onboarding, task management tools, and automated messages, including risk alerts and triggered emails. For the new employee, the onboarding solution may include dashboards that enable them to interact with the software through a secure portal and complete the required steps and tasks.

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Solving onboarding challenges with cloud HRMS

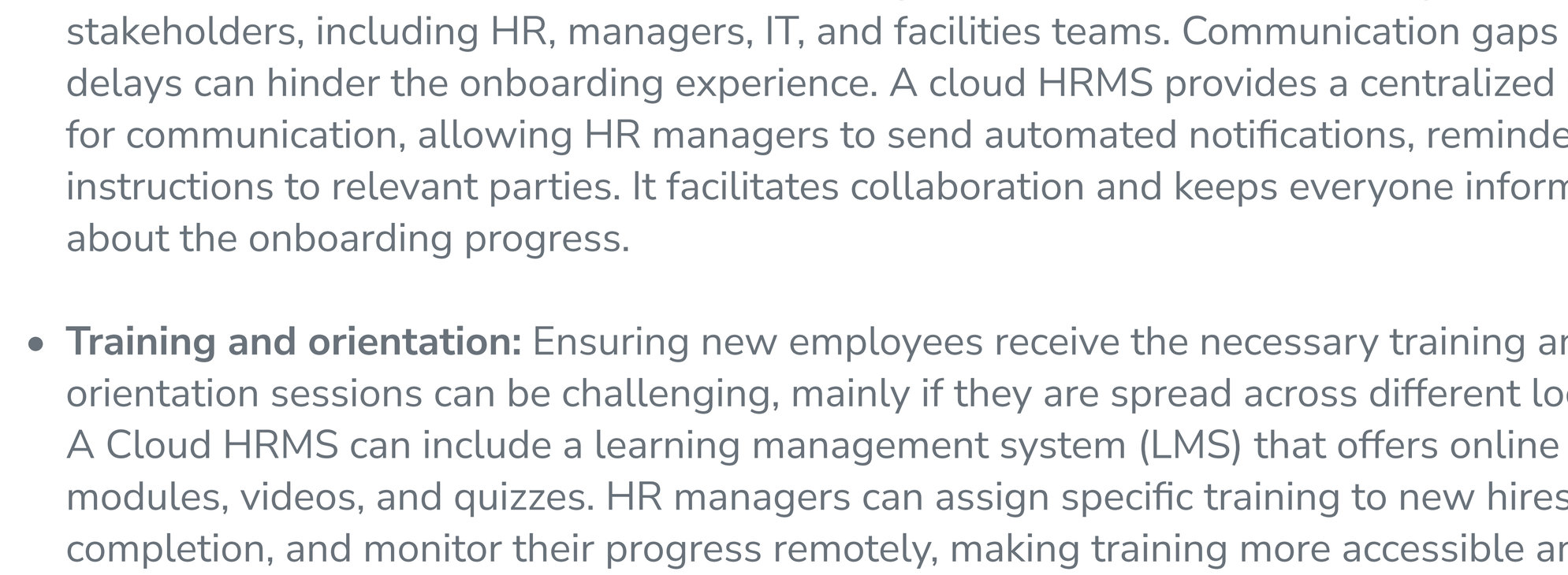
HR managers often face various challenges during the employee onboarding process. Implementing a Cloud HRMS (Human Resource Management System) can help overcome these challenges. Here are some common challenges faced by HR managers during Onboarding and how a Cloud HRMS can solve them:

- **Manual paperwork and administrative tasks:** Traditional onboarding processes involve extensive paperwork and manual data entry. This can be time-consuming, error-prone, and inefficient. With Cloud HRMS, all onboarding documents can be digitized and stored securely in the cloud. Employees can complete forms online, and the system can automatically populate employee records, reducing administrative burden and ensuring accuracy.

- **Lack of standardization:** Inconsistent onboarding processes across departments or locations can reduce clarity and dent the flow of information. A cloud HRMS allows HR managers to define standardized onboarding workflows, checklists, and templates that ensure consistency and compliance. This helps streamline the process and ensures that all necessary steps are followed for every new hire.

- **Communication and collaboration:** Onboarding involves coordination among various stakeholders, including HR, managers, IT, and facilities teams. Communication gaps and delays can hinder the onboarding experience. A cloud HRMS provides a centralized platform for communication, allowing HR managers to send automated notifications, reminders, and instructions to relevant parties. It facilitates collaboration and keeps everyone informed about the onboarding progress.

- **Training and orientation:** Ensuring new employees receive the necessary training and orientation sessions can be challenging, mainly if they are spread across different locations. A Cloud HRMS can include a learning management system (LMS) that offers online training modules, videos, and quizzes. HR managers can assign specific training to new hires, track completion, and monitor their progress remotely, making training more accessible and consistent.



- **Compliance and regulatory requirements:** Compliance with various regulations, such as employment laws and data privacy regulations, is crucial during the onboarding process. A cloud HRMS can help automate compliance checks and documentation, ensuring all legal requirements are met. The system can store and manage employee data securely, with appropriate access controls and encryption, helping HR managers maintain compliance with data protection regulations.

- **Tracking and reporting:** HR managers need to monitor the onboarding progress, track key metrics, and generate reports for management. With a cloud HRMS, they can gain real-time visibility into the onboarding process to track the status of each new hire, identify bottlenecks, and generate comprehensive reports on onboarding metrics. This data-driven approach enables continuous improvement and better decision-making.

- **Scalability and flexibility:** As organizations grow and hire more employees, managing the onboarding process manually becomes increasingly challenging. Using a cloud HRMS ensures scalability and flexibility. The system can adapt to changing business needs and accommodate remote onboarding, making it suitable for organizations with distributed teams or remote workers.



Key considerations for selecting an onboarding software

At a minimum, an employee onboarding solution should include features that enable a company to do the following:

- Seamlessly manage hiring paperwork through digital tools
- Ensure documentation compliance, even in compliance-heavy industries
- Create automated tasks or workflows for new employees and HR personnel
- Track employee progress in the onboarding process
- Create a single source of truth for employee information
- Generate analytics and reporting on the onboarding process

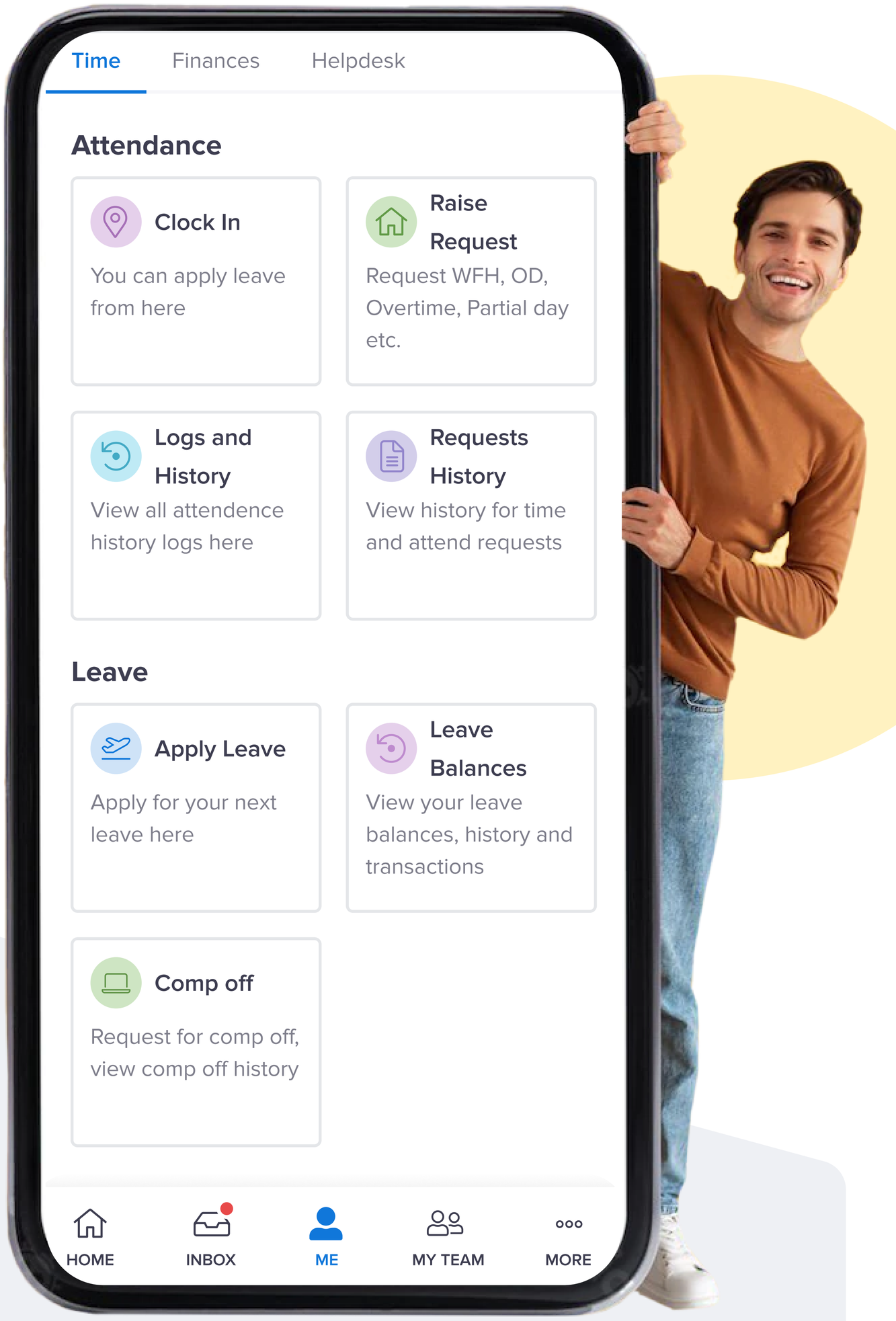
Keka has helped thousands of organizations and HR teams streamline their onboarding through its digital tools. With an expertise that spans across all major industries, we have embedded the best practices and most practical solutions within our HRMS. If you are facing onboarding challenges, just give a buzz and our expert consultants would be happy to help you!

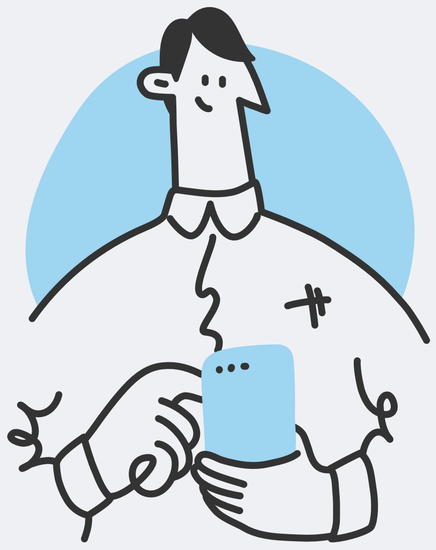
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About Keka

Everything you need to build a great company

Keka is your people enabler. From automation of people processes to creating an engaged and driven culture, Keka is all you need to build a good to great company.





Reach out to us!

+91 89292 08062