

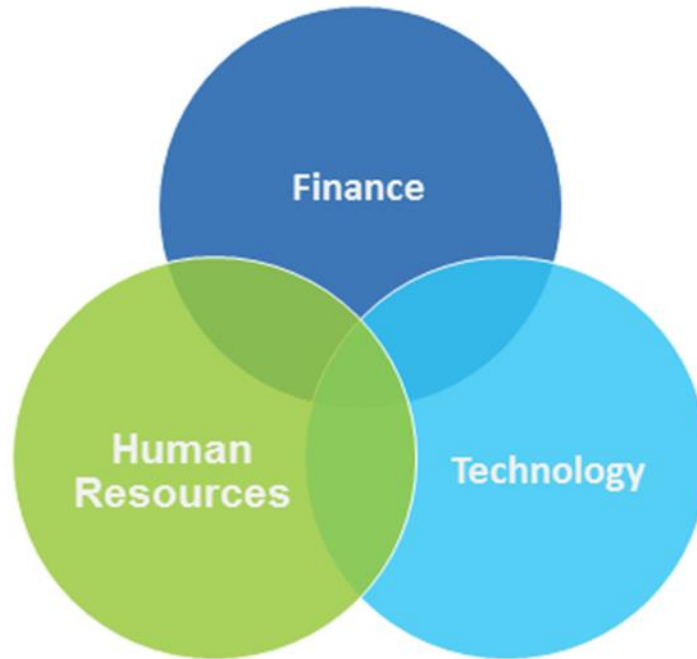
Employee Onboarding: The Key to a Successful and Happy Staff

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Insource Services, Inc.



*At Insource, we believe that HR, Finance & IT
start with people*

Insource Services, Inc.

What We Do:

- Full department outsourcing - generally part-time and long-term
- “A la carte” services
- Assessments
- Trainings
- Project/interim assignments

How We Do It:

- Seek to understand client businesses and mission
- Experienced, expert senior account leaders
- Account team with multiple skill levels; work is performed at the most cost-effective level
- Approximately 75 employees

Agenda

I. Nonprofit realities

- Lean staffing
- Common hiring and onboarding pitfalls
- Strategies to avoid falling into the pit

II. Onboarding - Framework for a more impactful process

- Goals of onboarding
- Conceptual framework

III. Tools, Tips & Checklists

- Insource – an example
- Day one – paperwork, introductions, common concerns
- 30-60-90 days

IV. Summary and Questions

Non-Profit Realities



- Lack of HR and hiring expertise – HR as a junior administrative function or HR as a Finance function until there is a problem. Overly complex hiring processes or not rigorous enough hiring processes
- Limited, traditional benefit packages or choppy generic programs not customized to culture or demographics
- Missed opportunities to capitalize on standard processes you are doing already – high impact points of influence
- Lack of access to information about how organizations like yours handle these functions

Common Pitfalls

- Over or under building systems – complicated processes that are challenging to institutionalize or no standard systems
- Hiring – inefficient processes and standards or none at all
- Untrained staff handling high touch interactions
- Undervaluing the hiring, onboarding, and exit processes
- Viewing HR as a set of rules vs. a form of marketing for your brand
- Processes are out of legal compliance – documentation, administration, etc.



Strategies to Avoid Falling Into the Pit

- Know what you know, know when you need expertise
- Remember that whomever handles HR for you is your face to the external world – to candidates, to new hires, those who leave happily or not so happily
- Add value to high touch employee interaction processes



Strategies to Avoid Falling Into the Pit

- Hiring is marketing to all of the candidates you don't hire, do it well and respectfully
- Have systems and standards – they make you look and work better
- Use tools and templates that can be customized



Onboarding

- Opportunity to market the company – benefits & professionalism –sets a tone.
- Opportunity to develop a rapport at a mid to high level – do not delegate to a junior person.
- Use this initial meeting well; 50% of the people you on-board will later be involved in an employment matter.



Goals of Onboarding

1. Help new employees adjust to company **culture**, social **environment**, and **performance** aspects of their **role** and **responsibilities**
2. Greater job satisfaction, confidence, and sense of contribution
3. Less stress
4. Greater organizational commitment

The quicker new hires feel welcomed and are prepared for THEIR job, the quicker they can contribute.

Increase Job Satisfaction

- Jump start relationships

Increase Performance

- Clarify delivery expectations
- Clarify objectives

Innoculate Against Turnover

- Provide support through feedback, coaching and follow-up

Onboarding helps new employees adjust to their jobs by establishing better relationships to increase satisfaction, clarifying expectations and objectives to improve performance, and providing support to help reduce unwanted turnover.



Connection

Culture

Clarification

Compliance

*The building blocks of successful onboarding are often called the **Four C's**.*

Onboarding at Insource

- **Things to consider:**
 - Offer letter, accompanying documents with detailed instructions — *what to bring, who to report to, where to go, etc.*
 - First day or week itinerary
 - Personalized welcome letter include vision, value, and ethos
 - Employee handbook
 - Other:
- **What needs to be done in preparation for Day 1?**
 - Desk set-up (Includes technology, phone, etc.)
 - Business cards

Tips for the Onboarding

- Develop some common ground, let the employees talk about themselves, learn a little about what makes them tick within their personal (revealed) context
- Educate them about the benefits – don't just fill out forms
- Establish yourself as a resource and a point of contact
- On average these meetings should take 1-1.5 hours



NEO - DAY 1

- Be aware of the competing cares. *What are employees thinking about?*
 - Making a good impression
 - Fit
 - Feeling confident
- Compliance (paperwork, signatures etc.)
- Present vision, value, and ethos

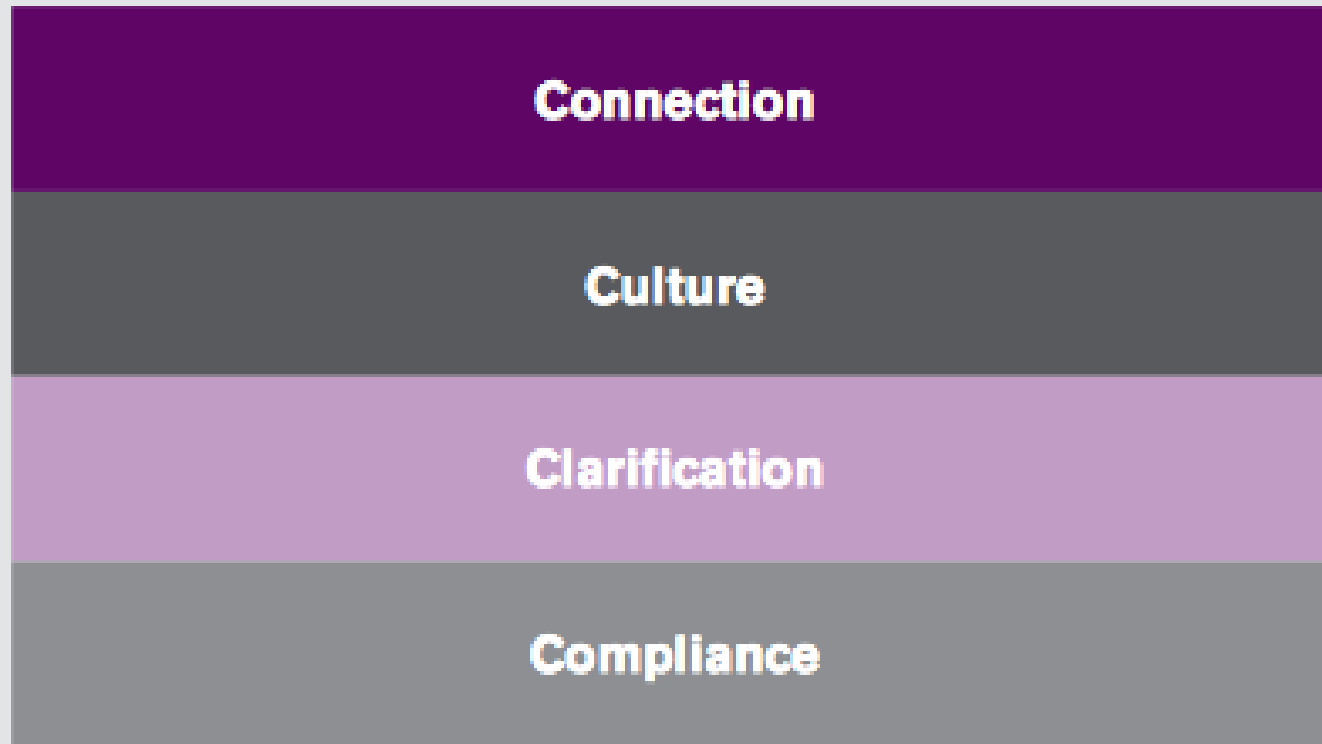


NEO - Day 1

- Assign a buddy (peer partner)
- Schedule check in times at strategic intervals
 - Everyday for the first week
 - Every other day the second week
 - Once a week for the 6 weeks
 - Every other week for the next month



Researchers have found that new employees are more likely to have learned and internalized the key values of their organization's culture if they had spent time with a mentor. ~ Bauer & Green



The building blocks of successful onboarding are often called the Four C's.

NEO - Day 1: Sample Agenda

I. Prime & Clarify

- Make the employee feel good!
- You were not hired, you were chosen!

CULTURE & CLARIFICATION

II. Welcome & Introductions

III. Compliance & Tour

- Paperwork & Policies

COMPLIANCE

IV. Seminal Company Information

- Vision, Mission, Values, etc.

CULTURE & CLARIFICATION

V. Peer Partner

- Introduction to mentor & lunch

CONNECTION

VI. Clarifying Questions

CLARIFY

VII. Key people

CONNECTION

VIII. "All Aboard!"

At-A-Glance 

OFFER



ONBOARD



NEO



INSOURCE
101
SERIES

Question & Answer

Thank You!



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