

# Successfully Onboarding New Employees



**Presented by: Krystal Daugherty**

**Date: June 12, 2024**

**Session: # 33062**

## ▶ Agenda

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- Why onboarding is important?
- Things to do before they start
- 2-week Schedule
  - Day 1
  - Week 1
  - Week 2
- Week 3 and Beyond
- Remote considerations

## ▶ Onboarding by the Numbers

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- HBR - 30% of new hires leave in the 1<sup>st</sup> 90 days
- 58% of companies retain new employees 3+ years IF they have a structured onboarding program
  - 77% of new hires hit their 1<sup>st</sup> performance milestone
- Positive onboarding exp = 18 times more committed to company & 37% more effective

## ▶ Before They Start

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- Call New Hire
  - Start Date / Time
  - Dress code – be specific
  - Office environment – their space (cube, office, shared)
- Two Days before Start Date
  - Start Date / Time
  - Full address of your office
  - Lunch covered on 1<sup>st</sup> day
  - You cell phone number
  - Where to park
  - Documents to bring (SSN, DOL, Passport)

## ▶ Preparation

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- Order company branded swag
- Clean work area
- Request access – vendor websites, shared emails, apps
- Create an onboarding schedule
  - Notify team members of when they will be training

## ▶ Completing the Schedule: Week 1

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Week 1																
	Monday			Tuesday			Wednesday			Thursday			Friday			
Time	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	
8am - 8:30am																
8:30am - 9am																
9am - 9:30am																
9:30am - 10am																
10am - 10:10am																
10:10am - 10:30am																
10:30am - 11am																
11am - 11:30am																
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noon - 12:30pm																
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1:30pm - 2pm																
2pm - 2:30pm																
2:30pm - 3pm																
3pm - 3:10pm																
3:10pm - 3:30pm																
3:30pm - 4pm																
4pm - 4:30pm																
4:30pm - 5pm																

▶ No Mondays - No 8am - No 5pm

Week 1

Time	Monday			Tuesday			Wednesday			Thursday			Friday		
	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact
8am - 8:30am					X										
8:30am - 9am															
9am - 9:30am															
9:30am - 10am															
10am - 10:10am															
10:10am - 10:30am															
10:30am - 11am															
11am - 11:30am															
11:30am - noon															
noon - 12:30pm															
12:30pm - 1pm															
1pm - 1:30pm															
1:30pm - 2pm															
2pm - 2:30pm															
2:30pm - 3pm															
3pm - 3:10pm															
3:10pm - 3:30pm															
3:30pm - 4pm															
4pm - 4:30pm															
4:30pm - 5pm						X									

▶ Setting a Good Example

Week 1

Time	Tuesday			Wednesday			Thursday			Friday		
	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact
8am - 8:30am												
8:30am - 9am												
9am - 9:30am												
9:30am - 10am												
10am - 10:10am	Break			Break			Break			Break		
10:10am - 10:30am												
10:30am - 11am												
11am - 11:30am												
11:30am - noon												
noon - 12:30pm	Lunch			Lunch			Lunch			Lunch		
12:30pm - 1pm												
1pm - 1:30pm												
1:30pm - 2pm												
2pm - 2:30pm												
2:30pm - 3pm												
3pm - 3:10pm	Break			Break			Break			Break		
3:10pm - 3:30pm												
3:30pm - 4pm												
4pm - 4:30pm												
4:30pm - 5pm	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal

## ► Add Your Calendar Items

Week 1												
Time	Tuesday			Wednesday			Thursday			Friday		
	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact
8am - 8:30am												
8:30am - 9am												
9am - 9:30am												
9:30am - 10am										Dispute Mtg	Confr Rm	John (Br Mgr)
10am - 10:10am	Break			Break			Break			Break		
10:10am - 10:30am												
10:30am - 11am												
11am - 11:30am												
11:30am - noon												
noon - 12:30pm	Lunch			Lunch			Lunch			Lunch		
12:30pm - 1pm												
1pm - 1:30pm												
1:30pm - 2pm												
2pm - 2:30pm												
2:30pm - 3pm												
3pm - 3:10pm	Break			Break			Break			Break		
3:10pm - 3:30pm												
3:30pm - 4pm												
4pm - 4:30pm												
4:30pm - 5pm	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal

## ► Thoughtful Scheduling

- Think about the natural order of learning a process
- Break up long bouts of computer learning
- Use peer training strategically
  - Align training topic to peer's strengths
  - Build confidence
  - Provide growth opportunity
- Leverage shadowing peers when unavailable for training

## ▶ Day 1 Handout

Week 1			
Tuesday			
Time	Task	Location	Contact
8am - 8:30am			
8:30am - 9am			
9am - 9:30am	Computer Setup / HR Docs	Your Desk	Self Guided
9:30am - 10am	General Expectations	K's Office	Krystal
10am - 10:10am	Break		
10:10am - 10:30am	Office Tour	Office	Newest Team Mbr
10:30am - 11am	Learning Style Assessment	Your Desk	Self Guided
11am - 11:30am	ERP Training: Customer File	Your Desk	Lead Team Mbr
11:30am - noon	Maintenance		
noon - 12:30pm			
12:30pm - 1pm	Lunch w/ Mrgs	Lobby	Krystal
1pm - 1:30pm			
1:30pm - 2pm	ERP Training: AR Screen	Your Desk	Lead Team Mbr
2pm - 2:30pm	ERP Training: Payment Screen	Your Desk	Lead Team Mbr
2:30pm - 3pm	ERP Training: Invoice Screen	Your Desk	Lead Team Mbr
3pm - 3:10pm	Break		
3:10pm - 3:30pm	Wrap Up	K's Office	Krystal
3:30pm - 4pm	Safety Training Videos	Your Desk	Self Guided
4pm - 4:30pm			
4:30pm - 5pm			

## ▶ Day 1

- Swag on desk
- Introduce to their team only
- Office tour
- Learning assessment <https://www.learningstylequiz.com/>
- Take to lunch w/managers or key contacts
- Let them go home early!

## ▶ Day 2 – 4 Handout

Week 1				Wednesday			Thursday			Friday		
Time	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact			
8am - 8:30am	Company Structure	K's Office	Krystal	Review portfolio accts / Knowledge transfer	Your Desk	Krystal	ERP Navigation Activity	Your Desk	Self Guided			
8:30am - 9am	Company/Dept Culture	K's Office	Krystal	Collection Calls	Your Desk	Shadowed by Team Lead	Dispute Meeting	Confer Rm	John (Br Mgr)			
9am - 9:30am	How to print invoice/statement	Your Desk	Team Member									
9:30am - 10am	How to take an electronic payment	Your Desk	Team Member	Break			Break					
10am - 10:10am	Break			Break			Break					
10:10am - 10:30am	Shadow Collection Calls	Coworker's Desk	Team Member	Collection Calls	Your Desk	Shadowed by Krystal	Collection Calls	Your Desk	Self Guided			
10:30am - 11am				Dept Policy: Terms, Late Fees, CC Fees	Your Desk	Krystal						
11am - 11:30am				Lunch			Lunch					
11:30am - noon	Lunch			Lunch			Lunch					
noon - 12:30pm	Lunch			Lunch			Lunch					
12:30pm - 1pm	Lunch			Lunch			Lunch					
1pm - 1:30pm	ERP Navigation Activity	Your Desk	Self Guided	How to search for a payment	Your Desk	Team Member	Collection Calls	Your Desk	Self Guided			
1:30pm - 2pm	Review Navigation Activity	K's Office	Krystal	Office Introductions	Office	Team Member						
2pm - 2:30pm	Job Specific Expectations	K's Office	Krystal	Outlook / Teams Setup	Your Desk	Team Member						
2:30pm - 3pm				Break			Break					
3pm - 3:10pm	Break			Break			Break					
3:10pm - 3:30pm	Collection Calls	Your Desk	Shadowed by Krystal	Collection Calls	Your Desk	Shadowed by Krystal	Collection Calls	Your Desk	Self Guided			
3:30pm - 4pm												
4pm - 4:30pm	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal			
4:30pm - 5pm												

## ▶ Day 2 - 4

- Navigation Activity – ask for data points found across the different screens you trained on
- Need to have real examples to process
  - Different types of payments (EFT, CC, check), call list, etc
- Email them standard forms
  - Remit instructions, ACH/wire info, credit app, list of helpful websites (SOS, vendor sign-ins, state/industry specific)

## ▶ Tips for Week 1

- Try to teach them one activity ASAP
  - Collector – collection calls
  - Credit Analyst – sending trade references
  - Cash Specialist – answering emails on pymnt rec'd
  
- Make annotated notes on your schedule
  - Jot down notes of what topics went short/long
  - Push any topics that were skipped for Week 2
  
- Create a “clean” copy w/updated timeframes
  - Save this as a template for next new hire

## ▶ Week 2 Handout

Week 2															
Time	Monday			Tuesday			Wednesday			Thursday			Friday		
	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact	Task	Location	Contact
8am - 8:30am															
8:30am - 9am															
9am - 9:30am	Team Mtg	Confr Rm	Krystal										Dispute Mtg	Confr Rm	John (Br Mgr)
9:30am - 10am															
10am - 10:10am	Break			Break			Break			Break			Break		
10:10am - 10:30am															
10:30am - 11am															
11am - 11:30am															
11:30am - noon															
noon - 12:30pm	Lunch			Lunch			Lunch			Lunch			Team Lunch		
12:30pm - 1pm															
1pm - 1:30pm															
1:30pm - 2pm															
2pm - 2:30pm															
2:30pm - 3pm															
3pm - 3:10pm	Break			Break			Break			Break			Break		
3:10pm - 3:30pm															
3:30pm - 4pm													Wrap Up	K's office	Krystal
4pm - 4:30pm															
4:30pm - 5pm	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal	Wrap Up	K's Office	Krystal			



## ▶ Tips for Week 2

- Send internal announcement of new hire
- Daily introductions to coworkers
- Increase autonomy
- Team lunch
  - Have ice breakers ready if needed

## ▶ Next Steps

- Weekly Check-ins
  - Take notes
- Schedule 30 / 60 / 90 day check ins
  - Provide feedback on trends from weekly check-ins
  - Outline goals for next 30 days

## ▶ Remote Considerations

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- Communicate team/dept/company culture
  - Small talk vs dive straight into business
  - Camera expectations
    - Multitasking on camera
    - Messy background
- Schedule coffee talks w/key stakeholders
- Assign a peer contact for each day



# Questions

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