Cultivated Onboarding

How to run an effective onboarding process – a sample process

By Rob Lambert
www.cultivatedmanagement.com

Disclaimer

Please note that much of this publication is based on personal experience and anecdotal evidence.

Although the author and publisher have made every reasonable attempt to achieve complete accuracy of the content in this Guide, they assume no responsibility for errors or omissions.

Also, you should use this information as you see fit, and at your own risk. Your particular situation may not be exactly suited to the examples illustrated here; in fact, it's likely that they won't be the same, and you should adjust your use of the information and recommendations accordingly.

This Guide

This is a free resource made available by Rob Lambert from [Cultivated Management](#).

Feel free to copy this Evernote template or use the public Trello board as a guide too.

If you need any further help or advice with hiring Technologists my book "[Join Our Company](#)" will be helpful for you.

This guide is also available in Trello - [here](#) and Evernote - [here](#).

This Guide

TABLE OF CONTENT

Table of Contents

INTRODUCTION

This guide is a sample guide. It's a good starter. It will not be perfect.
Mash it around until you get something you like. Add, remove, move, change

DISCPLINE allows learning

When you are disciplined and follow a process you can study what works and what does not.
If you do this process randomly, or sporadically - how will you ever gain enough data to
improve? How will you know what works and what does not? How will you improve the
process?

Be aware - you "own" the process of making your new starter as effective as they can be.
Even if some of the tasks are done by others - it's YOUR responsibility as a manager - make
sure you're doing all you can

PURPOSE

The purpose of the onboarding process is two-fold

1. To make your new starter effective quickly.
2. To make your new starter feel welcomed to the team and the organisation.

Effectiveness early is good for your team. It's therefore your responsibility as a manager to
ensure early effectiveness by following and adapting a high performing process like this one.
It's not HR, IT or anyone else - it's you and your direct report.

1. Create a new template to your Evernote account and then create a new one for each
   new employee
2. **Ensure you have this document and where it is stored approved to store
   personally identifiable data (GDPR)**
3. Ensure you have a mechanism to lock down who can see this process, and a process
   in place to delete data after your retention period
4. Assign tasks to your new starter - there are plenty of things for them to do (share this
   note)
5. Tick the tasks, chase up on progress, ensure your new team member gives feedback
   on this process.

BEFORE THEY JOIN

Extend the offer - and create your new starter process

- Create the new starter process that is relevant to your business.
  - Identity creation
  - Hardware and software provisions
  - HR process
  - Offer and contract process

** IMPORTANT **

Ensure there is a deadline attached to the offer - and ensure its chased. At this point you are waiting for the candidate - they have the "ball in their court" - until you have the ball back (a signed commitment) they have not technically accepted - don't rush ahead.

Make the Team Aware

- Team to be aware of new starter and be ready to welcome them to the team.
  - How will they welcome the new person?
  - Do they need to prep anything?

Set a meeting in your calendar

- Organise a meeting in your calendar with whoever is welcoming the new starter (HR, YOU, TEAM) to ensure it's not a last-minute surprise, or even worse - that nobody is there to greet them on their first day :(

Manager sends a welcome message

- Consider video for this - it works REALLY well for welcoming new people to the team. An email is ok too.
  - Some ideas for topics below
    - Should they do any reading or preparing before first day?
    - Give a big picture view of the team and how their role fits in?
    - Anything specific they need for their first week?
    - Provide relevant contact information within your team

- Who will they be working with?
- What is the dress code?
- Things to do while in the new location
- Who will be their mentor/buddy on day one?
- Who should they ask for on their first day?
- What time should they start?

Send some books through the post

- You expect your new starters to learn, right?
- A nicely packaged book bundle with stationery and welcome note sets the tone perfectly. Learning is key.
- "Here's some free books and feel free to read any of them before you start" - powerful

Organise travel, parking, bike lockers

- Do they need a space booking, or a taxi from the train station, or a guess pass to the building pre-organised?
- Do they need a bike locker code?
- Make it seamless.

Assign a Buddy / Mentor

- Ensure there is a buddy/mentor assigned and that they are prepared for the new starter.

Schedule meetings with people

- Schedule meetings with managers, execs, teams etc across the business.
- The first week is a great week to get to know the "why" of the organisation and become smart about the organisation right from the start.
- Get them all booked in to ensure a higher chance of availability. Don't wait until they start to book these in - although there may be some delay if email addresses for the new starter have not yet been provisioned.

Announce the new starter to the immediate team

- Send a department wide notification about the new starter.
- Do this nearer the start date in case there are any complications with the offer.
- (Not company-wide, but at least team/department wide)

DAY 1

Get the right tech and software for arrival

- Ensure the tech and software is ready, collected and configured/setup where possible.
- There is some power in setting up your own systems as a new starter, but sometimes it's nice to have some things ready to roll.

Ensure relevant access to systems

- If you have a great automated identity provisioning system, then you may be able to skip this section - most companies don't have this.
- This may span many days but will be good for a Day 1 activity.
- Go forth and add your tools below

Get a tour

- Cafe, Toilets, Fire Escapes, Chill out areas, Prayer Rooms, Water Coolers, Games room, etc etc
- Essential but often overlooked

Welcoming Effective Desk

- Ensure they have a desk and maybe a coffee/tea waiting.
- You should have stationery ready to go and maybe a small gift.
- Let the team own this and add their own personal style - you'll be surprised at how creative people can be in welcoming new people - especially if they have some budget.

Organise a Manager 1:1

- I believe in effective management. If you don't have managers, then organise something else.
- Book a 1:1 for later in their day and sit with them to talk about the following:
  - Who-is-who in your team - walk them around and introduce

- o Walk through company values
- o Book your regular 1:1s with them
- o Explain the 1:1 process
- o Explain their job role and behaviours expected - explain what is expected
- o Explain that you will give positive and negative feedback - this is not common in many companies so needs articulating
- o Field any question

Meet the Execs

- A meeting with your department exec would be good.
- Maybe some other execs are later in the process.
- Remember - These SHOULD already have been booked

Book a team lunch

- Team lunch - no managers makes sense, but I've seen it work with managers too. The team are best placed to decide how to roll with this one.

Employee Welcome / Handbook

- Point towards any employee handbook, wiki spaces or people in the know

Announce new starter

- You may have systems or policies in place to do this, or to stop you doing this ▯
- Announce to the business your new starter and make it feel personal - generic is pathetic - tell a story, make it interesting, let people know why this person was hired and what they bring to the business - you are hiring brilliant people to solve real problems - tell the business why.
- Although I say don't send generic - I think a "standard" template is good - that is altered and changed for each person.
- CAUTION - Do this for everyone so people do not feel others received a better welcome or special treatment.

Introduce HR Policy / Legal

- Generic overview of legal and HR policies that are really important to know from day 1.

Work Updates and Status

- Provide updates and details about the work:
- Current state, future state, processes, responsibilities, etc

Team Update

- Ensure the team have given them the information needed to understand the product, process, work items and how this person will fit.

End of day catch up

- Have a chat at the end of the day:
    - Any questions
    - Are they coming back tomorrow? ⍰
    - How may you help?

WEEKS 1 - 4

Organise Product Overviews

- Get Product overviews by people who know the products.

Organise Sales Overview

- Everyone in an organisation should know how the product/service is sold, who buys it and why. Sales leaders often give good talks ☺

Meet HR

- Meet someone from HR if this has not been done already on day 1.
- Get to know the process, who is who and what HR are there for.

Delivery Process and Improvement Plan

- Walk through how the software and service gets to the customers and show the improvement plan.
- This is important as it shows how their work contributes to the bigger picture but also why there will be gaps, flaws, challenges and nuances - they can then see how they may help address these. If you have a perfect delivery process, you're likely lying.

Talk about performance

- Start talking about performance, what's expected of them, how the appraisal/promotion process works (or doesn't) and how they can progress through their career.
- It might be too early to talk about this in their first week, or it might not be - use judgment - but don't avoid this.
- You must let them know what the standard is and how they will be measured against it.
- Put in place a learning plan.

Read any compliance/security/health and safety shizzle

- Read any compliance/security/health and safety shizzle

Review the process - how has it gone?

- Review this onboarding process - how has it gone?
- What could be better?
- Is everything completed?

Frequently Asked Questions

In this section include any FAQ that come up a lot or add them to the guide above.

This is a free resource made available by Rob Lambert from Cultivated Management.

Feel free to copy this Evernote template or use the public Trello board as a guide too.

If you need any further help or advice with hiring Technologists my book "Join Our Company" will be helpful for you.

This guide is also available in Trello - here and Evernote - here.