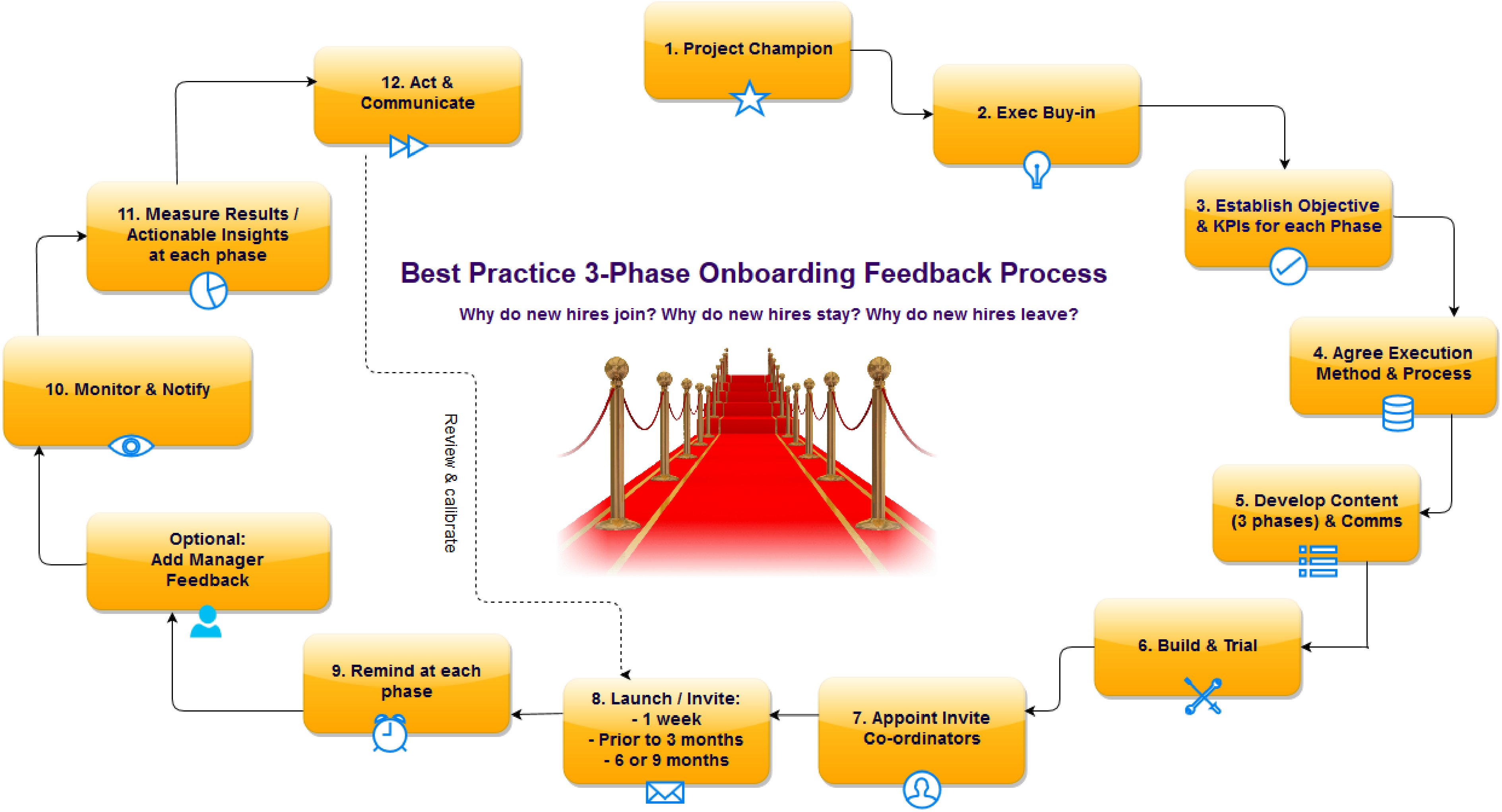
12 Steps for Creating a First Class 3-Phase Staff Onboarding Feedback Process



EXCEPTIONAL SURVEY SOLUTIONS

Appendix: - Best Practice 3-Phase Onboarding Feedback Process. 12 key steps:

1. **Project Champion -** Appoint an onboarding process project champion.

2. **Exec Buy-in** - Attain executive management agreement and desire to capture onboarding data and act on results. It is estimated that half of all hourly workers leave new jobs in the first four months, and half of senior outside hires fail within 18 months. Use Staff Turnover tools such as https://bonus.ly/cost-of-employee-turnover-calculator to calculate this cost.

3. **Establish Objective & KPIs for each phase** – for example:

   All phases:

   a. Improve early churn (departure within 1st 12mths) from new hires from (eg): 25% to 15%.
   b. Identify cultural issues.
   c. Improve satisfaction with the induction and onboarding process.

   Phase 1 – First Impressions. Objectives might include:

   a. Identify the best source of candidates.
   b. Identify any weaknesses in the current recruitment process.
   c. Gain an understanding of what is important to the new hire and then measure how satisfied they are against this criteria.

   Phase 2 – Settling in. Objectives might include:

   a. Reconfirm what is important to the new hire and then measure how satisfied they are against this criteria.
   b. Improve time to productivity – ensure that all compliance and clarification of tasks have been satisfactorily completed.
   c. Identify training / compliance gaps.
   d. Assess the performance of the new hire – seek Manager feedback too.

Phase 3 – Flourishing. Objectives might include:

a. Measure the Flight Risk of new hires
b. Reconfirm what is important to the new hire and then measure how satisfied they are against this criteria.
c. Identify star performers. Request referrals – who else do they know who may be appropriate for your role?
d. Identify development and training needs

Tactical Objectives for Administrator:

a. Achieve 75%+ participation from new hires.
b. Ensure invites go out within 7 days of the employee milestone dates at least 70% of time.
c. Distribute high-level results to the exec team, including date trend lines for key metrics at least twice annually.

4. **Agree execution method & process.** – decisions to be made include:
   a. Decide format - online only feedback, phone feedback, face to face, paper forms for remote workers, etc.
   b. Decide on pre-load data fields – eg. state, gender, department, role type, etc.
   c. Decide on approach to respondent anonymity.
   d. Decide on survey and reporting software used.
   e. Decide on manager and/or HR involvement in providing feedback about new hires.
   f. Decide on process for HR to be notified of new hires.

      - **Tip:** Payroll knows every time someone joins the organisation (otherwise new staff would not be paid!) – make sure you're in that loop.

5. **Develop Content (for 3 phases) & Communications**
      a. Agree questionnaire, invite copy, reminder copy, pre-loaded data:

   Phase 1: Does the questionnaire content assess the Recruitment Process and initial Induction and, if required, facilitate the management and collection of forms?

Phase 2: Check that your questionnaire content covers Compliance, Clarification, Culture, Connection, Growth, Work Environment and Esteem:

- Compliance: ensure all policy and legislative requirements are understood by the new hire,
- Clarification: ensure the new employee understands how to perform their role,
- Culture: ensure that the new employee understands the formal and informal norms of the Organisation,
- Connection: ensure the new employee has developed interpersonal relationships within the Organisation.
- Growth: ensure that the new employee has received the appropriate training,
- Work environment; ensure that the new employee has the appropriate tools, support and environment to be successful within the Organisation.
- Esteem; ensure that the new employee sees the growth and development path open to them and that they are feeling satisfied and successful in the role.

Phase 3: Does your questionnaire content highlight any new hires at risk of leaving the Organisation? Are there any gaps in the skill development of the new hire?

b. Proof the questionnaire content and sign off.
c. Consider any pre-launch communications that need to be sent to Management about the new initiative / benefits thereof.
d. Step back and ask yourself – will this data give me what I need to meet the objectives I set earlier and enable me to make better, more informed business decisions?

6. **Build & Trial** - set up a trial run. Check for flow. make sure your questions are branching and hiding when they should be! Check your invites and reminders are being received (remember to whitelist with IT). Have you got your notifications setup? Has recipient rules been enabled to ensure recipients don't receive multiple invites? Check your reports – will they give you what you need?

7. **Appoint Invite Co-ordinators.** Agree invite frequency. E.g. ensure invites go out +/- 7 days of the employee's milestone dates at least 70% of time. Invite tips:
   - Ensure you clearly explain who will see the feedback, and how it will be used, whether it is anonymous.
   - Look for opportunities to pre-load data. E.g. The survey form can often be pre-coded with the employee's name, their division, their Manager's name, Start Date, Source of Hire, Type of Employment, and their location so that HR can easily report and filter results by this information.

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8. **Launch / Invite** – put the process in action and conduct your first onboarding survey. Upload invites upfront for each of the 3 phases.

9. **Remind at each phase** - Allow each new hire 1 week to respond. Send an automated reminder message after 7 days if no response received.

Optional: Add Feedback on Performance –
Setup an on-forward action so that Managers can also add their feedback on new hire performance. This extra feedback mechanism can either be setup so that a summary of non-sensitive feedback from the new hire is provided to the Manager or so that the Manager simply enters their own information. Including this step in the process encourages Managers to take a moment to think more deeply about their new hires, their needs and any concerns they may have. Additionally, it provides HR with an opportunity to assist Managers with the onboarding process by flagging any issues the Managers foresee or are experiencing with their new hires. An example of this is when the New Hire may perceive their written language skills to be meeting the requirement of the role however the Manager may feel that this is an area that the New Hire requires additional support.

10. **Monitor & Notify:**

    - Once the New Hire (and the Manager) have completed the survey, HR should be notified by e-mail. HR should scan to ensure there are no red flag issues that require immediate attention and/or disconnects between the Manager’s perception and that of the New Hire.
    - Should be receiving at least 50% response rate or could point to something that needs fine tuning in your process.

11. **Measure Results / Actionable Insights at each phase** – run, or if they have been setup to auto-send to you review, the reports. Choose a system that gives you access to real time data. Schedule date-defined reports to review cumulative results, spot trends, and measure the change in ratings over time for the whole company, or broken down by department or location. Decide what’s relevant. Distribute to your exec team. Make recommendations regarding corrective actions / new initiatives to improve your new hire process.

12. **Act & Communicate** – Consider quarterly or 6 monthly high-level monitor reports. Also produce a more detailed annual action plan. Address key areas of weakness and execute new initiatives. Focus on no more than two key initiatives per 6 month period as a direct result of your new hire feedback. Assign responsibilities and timeframes.

-- Review performance against KPIs & Recalibrate where required --