

EBOOK

The Complete Guide to **Onboarding** Training

The When, What, and How
of Modern Onboarding for the
Most Successful Organizations



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Why is Onboarding Important?

Every organization needs to onboard new employees. For some, onboarding is just another series of boxes to check. But the most successful companies understand that it is a critical stage for their employees' future success. Not only does an organization get the employee up to speed on company benefits, policies, and practices, but the employee is also getting a sense for the organization. In their minds, they are quietly making decisions about their new place of employment: Is this a place where I will be engaged, or just "punching the clock"? Will my short- and long-term career goals be met working with this team?

While we can't know everything that goes on in a new employee's head, we do find strong evidence that good onboarding leads to strong retention rates.

Zippia reported that employees who went through a structured onboarding program **were 58 percent more likely to be with the organization after three years.**¹

A study published in Training magazine puts this percentage even higher, finding that, in the companies studied, **69 percent of employees stayed three years or more when they experienced good onboarding.**²

These studies make sense when one considers the psychological impact of effective onboarding. Management conveys a clear understanding and the expectations of the new hire's role. The company provides the proper training for success. This in turn makes them more comfortable in the role. They are able to achieve their peak performance sooner, and with more early "wins" under their belt, they are more likely to feel the organization is a good fit for them.

58%

More likely to be with the organization three years after going through a structured onboarding program

69%

Stayed three years or more when experiencing good onboarding

The Onboarding Challenge: Appropriate Training

Of all the different parts, appropriate training for new employees takes the most time, and potentially requires the most internal resources.

But training is also the most critical component for onboarding success. Ask yourself: **what part of onboarding is likely to make the greatest impression on new hires?** It's probably not going to be filling out paperwork, or seeing where the break rooms are located. No, the first meaningful interaction with any organization is the organization's commitment to provide quality, and ongoing, training throughout their career.

This eBook is here to help!

We want to give professionals an overview of onboarding training and the ways in which modern companies are rethinking that training. Onboarding training profoundly impacts the way new hires view the organization's learning culture. Take this opportunity to make a good impression... one that will boost engagement and retain key talent.

An effective onboarding program includes many critical components:

- HR personnel forms
- Benefit presentations
- Policies and compliance training
- Colleague and peer introductions
- Job role and realistic expectations with achievable benchmarks discussion
- On-the-job training



Goals of Onboarding Training

Onboarding training sets the tone for the new hire's experience. Not only should training include compliance and policies and procedure topics but it should also fill in any skill gaps. Proper training will help them be successful in their new role.

Skills building: Management should focus on skills training. This encompasses everything the new hire needs to successfully perform their job. This includes relevant skills needed such as time management training as well as very specific training, like how to operate equipment or use a particular software program. Safety procedure training is also included in skills training.

Knowledge building: The employer also needs to share their knowledge. This includes what new hires need to know aside from the skills they'll need to perform their job. For example, compliance training, such as, anti-harassment, is necessary to understand company policy.

Impression building: Remember, "You never get a second chance to make a first impression." The employee is trying to get a feel for their new company during their first critical weeks. They want to know what the company is all about, the culture, and who they can ask for guidance and help. They want to feel excited about their new role and they will take their cue from the onboarding experience.



Planning Steps:

Getting Started on Your Goals

- Think about what is currently included in your onboarding training.
- Is skills training included so the new hires are well equipped to successfully perform their job? Is safety training given?
- Is knowledge shared? And, is compliance training required?
- What impression is your onboarding conveying to not only new hires but your entire company? Do you truly have a people-first learning culture?
- Looking at the big picture, what onboarding goals are under-represented or lacking?
- How effective is your training in all areas of your company?
- Is your current training program meeting your company's short- and long-term goals? How are you measuring ROI?



Getting the Timing Right for Onboarding Training

Some successful employers realize onboarding can take up to a year depending upon the role. Many organizations adopt a 30/60/90-day model for onboarding plans. Others make a big deal about “Day 1” training and orientation.

While it’s good to have a worked-out road map for onboarding, why count days from the start of work? Why not prepare new hires before they even come into the office?

Successful companies already do this. **One study by Aberdeen Group found that 83 percent of the highest-performing organizations began onboarding before the new hire’s first day.**³ This allows employees time to absorb a lot of the material they will need to know on Day 1, freeing up that time for more personal introductions, mentoring, and brief team meetings.

83%

of the highest-performing organizations began onboarding **before the new hire's first day**



What Can Companies Cover Before Day 1?

Here are some ideas:

Share a taste of the culture. Send your new hires a video greeting welcoming them to the company. Capture video of other employees talking about their work, their coworkers, the company, and how all three make them feel.

Present your organization's mission and values. A landmark study by Deloitte shows that 76% of employees who put a priority on business culture also believe that a "clearly defined business strategy" does help to create such a culture.⁴ Having a clear, succinct statement of your company's mission and values can help set the tone for your new employees. It's always wise to share your company's mission statement during the job interview process. Not only does it emphasize the company's commitment to your mission but also helps the prospect determine if they would be a good fit.

Prep new hires on your benefit options. You can send them benefits information, such as 401(k) plan and benefit options, so they can review and discuss any questions on Day 1. This speeds up the benefits discussion, allowing more time for training and meeting co-workers.

Start the compliance conversation. Many compliance topics are handled by taking a required course that reviews important compliance information. With an appropriate learning management system, you can assign compliance courses, track viewings, and even administer online quizzes to ensure understanding.



Planning Steps:

What You Can Cover Before Day 1

- Make a list of what you feel your company can cover prior to the new hires' first day.
- Is there anything else you could cover? Any additional safety or compliance topics? More specifics about the company's mission, vision, and values? If so, add this detail to your list.
- Once your list is completed, put the tasks in order based upon what the new hires will need to learn first.
- Consider the following when setting priorities:
 - What topics are most important
 - How to present the information
 - How to confirm they have read or viewed the materials

Helpful Tip:

Create a "countdown to Day 1" calendar that outlines what materials new hires need prior to their start date.



Why Use Video for Onboarding Training?

Whether or not you have signed on to the idea of pre-Day 1 training, there are good reasons why you will want to consider using online video for your onboarding training. These fall into four broad categories:

Accessibility: In-person onboarding conversations may get delayed when other priorities arise. Having online videos available 24/7 means new hires can watch their training videos as necessary, on Day 1, Day 10, Day 100...or even before Day 1. This works well for important benefits conversations they may need to have with their family. They can rewatch the videos at home, at night, or on the weekend.

Consistency: Unfortunately, people can be rushed or distracted during onboarding conversations. This applies both to the new hire and the onboarding manager or HR leader. And those who continually onboard new hires can easily get bored of the same ol' same ol' and attempt to change things up only to inadvertently leave out important details. There have been cases where an enthusiastic HR leader has tried to change things up to keep these presentations interesting, but also inadvertently changed the message.



Video is ideal for content that must be delivered exactly the same way, every time. It guarantees an appropriate tone is conveyed, the correct language is used, and important details are covered.

Efficiency: Employees can watch their onboarding videos, take notes, and get their information immediately. This saves time for the HR team (which normally has to repeat these meetings and conversations over and over). It also saves time as it eliminates everyone sitting through conversations that do not apply to them. If anyone has questions, they can be answered one on one rather than take valuable time away from the group. Videos can provide the foundation, and the HR leader can provide the personalized details.

Connection: Some believe using videos and technology for onboarding is less personal than a group meeting making it harder to achieve a connection with the new hires. Video offers an alternative through a blended approach. New hires can view the video at their convenience wherever and whenever they choose, and then can have a more personal 1-on-1 conversation with the onboarding leader, if need be.



Videos make a lasting impression.

New hires will feel valued knowing their employer took time to create the videos and effectively onboard them.



Planning Steps:

Using Video for Onboarding Training

- Do you onboard new hires in large meetings at your organization?
- How much 1-on-1 time do new hires receive with the onboarding HR leader?
- Would you free up valuable time if training videos replaced onboarding meetings?

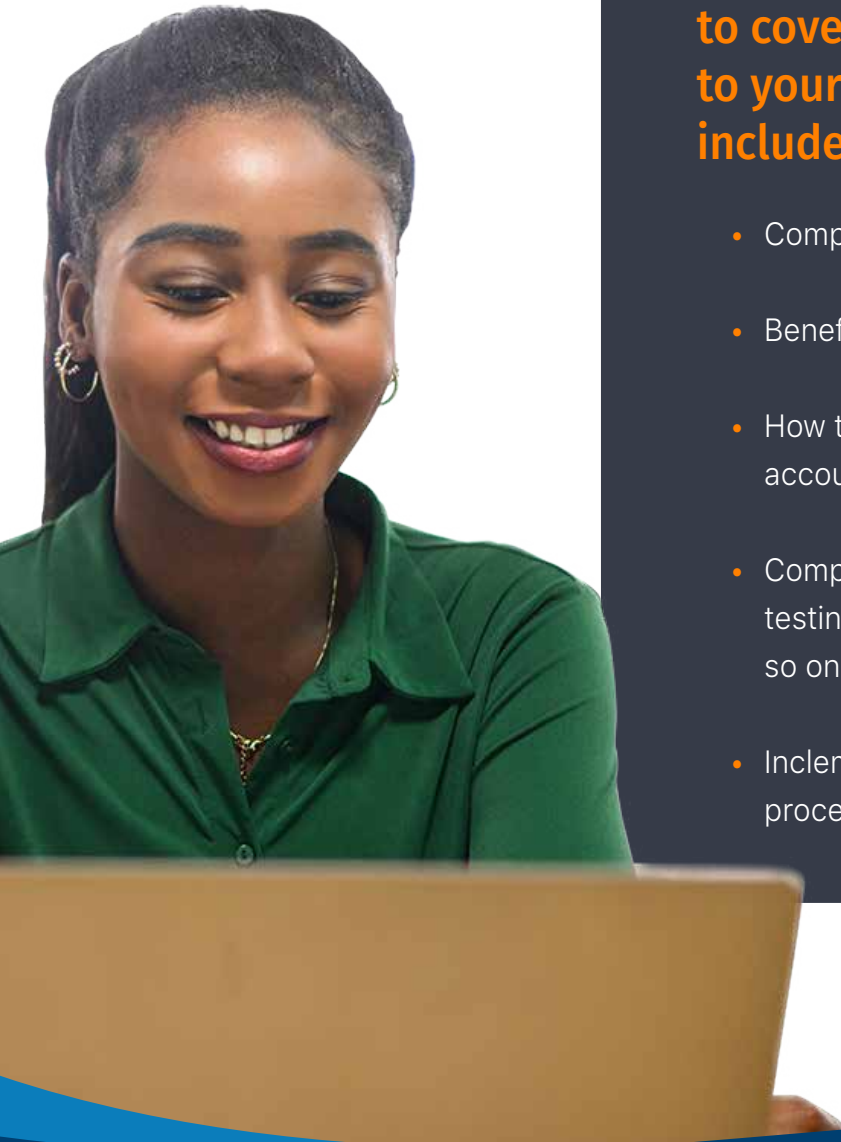
Thoughts to ponder...

It may be time for your organization to take some concrete steps toward gathering the content needed to create a video library. Keep in mind, your library could be both off-the-shelf and custom to your organization.

Custom Video Topics for Onboarding

There are many topics that are unique to your organization and can't be handled by a "one size fits all" video. In these instances, custom content would need to be created to speak to those particular values and policies.

Chances are you're stretched too thin to have the time to create effective training courses. HSI can manage the entire process and timeline for you. We are experts in transforming complicated training messages into effective microlearning training courses.



Many onboarding topics are going to cover content that is particular to your organization. These might include things like:

- Company mission, vision, and values
- Benefits options
- How to use proprietary or custom systems (for accounting, project management, IT, etc.)
- Company policies around issues like drug testing, social media use, public behavior, and so on
- Inclement weather policies and disaster procedures

Planning Steps:

Custom Video Topics for Onboarding

- Which of the topics mentioned need to be part of your onboarding at your organization?
- What else needs to be included on your list?
- Once you have a list of onboarding topics, take note of your own resources.

Please seriously consider...

Do you have the tools and bandwidth in-house to create custom content or do you need outside professional assistance?



Off-the-Shelf for Onboarding

While some onboarding content will be unique to your organization, not all will be. In fact, much of it will reflect best practices in your industry and the business world at large. They are in a sense, universal.

Take safety training videos, for example. HSI has a video course in our library that is specially about fire extinguisher operation. There's nothing "custom" about it - after all, it's not like fire extinguishers somehow work differently from company to company. The same goes for many compliance topics and skills training.

Imagine the time it takes to create custom content for all those possible topics!

According to a series of studies by the Association for Talent Development⁵ it would take **43 to 141 hours to create 1 hour of online material, or over 6 months to create a one-week program.**

Do you have that kind of time?

Using off-the-shelf video courses allows both you and the L&D team to focus on creating more company-specific training.



Here are a few more examples of areas where off-the-shelf training videos makes sense during onboarding.



Company Culture: While your company culture is obviously unique, navigating a new company culture requires skills that are universal. Training around working with diverse teams would be helpful. Courses on emotional intelligence and unconscious bias can also help new hires adjust more quickly.



Compliance: 31% of chief compliance officers either don't know or don't communicate or conduct culture trainings across their company. Imagine how much that statistic would change if compliance training was made easier and more accessible! HSI's off-the-shelf anti-harassment and anti-discrimination video courses are examples of a good fix.



Cybersecurity: The best way to protect your organization from modern cybersecurity threats like malware, phishing, ransomware, and identity theft is to train your employees from the outset, using the most up-to-date content. Here, off-the-shelf cybersecurity training videos can shine to help fill this critical need.



Practical Support Skills: All companies are unique, but most best practices, such as phone call and email etiquette, running effective meetings, and working remotely, are the same.



Technology: Some forms of technology are so pervasive that it pays for all employees to learn them — or, if they are already familiar with them, to take things further and master them. Think of Gmail and Google Suite, or Office 365 (including Microsoft Outlook and Teams). Internet usage policies might fall under this category, too.

Planning Steps:

Off-the-Shelf for Onboarding Training

By now, you should have a good idea of which training topics need to be custom, and which can be satisfied with off-the-shelf content. The next natural step is to begin looking for vendors that have an appropriate off-the-shelf library for your needs.

Before you proceed with that shopping step, you need to consider:

- How many topics do I need now?
- How many additional topics will I need in the future as we grow?
- To what degree do I need content that is fresh and up to date?
- Should the videos include a live presenter?
- Are the videos created in a microlearning format?



The Blended-Learning Approach

Blended learning is “a formal education program in which a student learns at least in part through delivery of content and instruction via digital and online media with some element of student control over time, place, path, or pace.”⁶

The idea is that computer-mediated instruction is added to, or combined with, more personal face-to-face instruction. This allows learners to have more control over the learning situation, choosing the time and/or place (for example, home versus office or training center); their path (what they learn); and their pace (the rate at which they absorb content).

This is, in fact, the approach to onboarding we have been advocating for in this eBook. Now, with definition in hand, we can see the broader picture. New employees can learn a good deal from video content, made accessible to them online. This training can begin even before Day 1 and cover both topics unique to the organization and topics that are a little more universal. Because the employee is completing part of their onboarding training on their own, it frees up the onboarding managers' and HR professionals' time.

They can now spend that newly found time actually improving the onboarding experience. For example, they can now:

- Schedule more 1-on-1 time with new hires
- Focus on answering questions instead of giving presentations
- Help employees interpret difficult information
- Streamline benefits discussions
- Ensure compliance faster
- Transition training time to mentoring/shadowing time



For more on blended learning:

We highly recommend our eBook [A Guide to Blended Learning](#).



Planning Steps:

The Blended-Learning Approach

There is little reason to be concerned about transitioning to a blended-learning environment. Still, there might be some people who resist the idea of blended learning — that's why we put it toward the end of the eBook!

- Take a moment to think about which stakeholders will need to get on board with a new format.
 - Trainers, for one, will need to be comfortable adjusting live presentations to more active and engaging discussions based on material presented online.
 - Onboarding managers will need to learn how to assign online material, as well as how to track views and completions.
 - Workflows for compliance will need to change, as will paperwork for salary and benefits.
- All of these changes will be a good thing — but, like any change, people will resist and want to do things “the old way.”
 - Plan how you are going to get buy-in.
 - How will you present the advantages of blended learning for your onboarding experience?

Measuring the Impact of Onboarding Training

Resistance to change will happen not only when a new system is put in place. It can also happen later — for example, when budgeting discussions come up and leadership begins asking questions about ROI.

Which means that there will need to be proof of the impact and effectiveness of the new onboarding training. How can that be measured?

Raw Content Views: One of the advantages to using online training content is that you can monitor who accesses it, when, and for how long. If both views and viewing time go up, it will prove that new employees are that much more engaged with the new system.

Surveys: Simple surveys asking about the onboarding experience can create plenty of good data showing a better employee experience. You don't necessarily need a separate survey, though. A few questions added to a 360 survey your company is already implementing can be a great way to get data without creating more "busywork" for employees.

Employee Reviews: A lot of vendors talk about "time to productivity," which is the total time it takes for a new employee to reach their peak productivity in a company. While

it's true that this is an important metric, it is notoriously hard to capture. After all, how do we know when an employee is truly at their peak? The people who can give you the best feel for this are the managers who are already reviewing employee performance. Leverage their insights by asking them how quickly employees are getting up to speed and whether they have noticed a difference in that rate over time.

Retention Rate (Turnover Rate): A lot of turnover points to an onboarding problem, either inadequate training, poor benefits explanations, or simply bad first impressions of the company culture. If the turnover rate dips and retention rises, your new onboarding program is taking care of these issues. (Also be wary of too high a retention rate, as your organization might be hanging on to new employees who are no longer a great fit.)



Planning Steps:

Measuring the Impact of Your Onboarding Training

- Don't forget to include the appropriate metrics when planning any changes to your onboarding process.
- Think about how you will measure and prove success. Then, work this into the onboarding process from the start.



Further Reading

[A Guide to Blended Learning](#)

[A Guide to Creating an Employee Training and Development Program](#)

[How to Buy eLearning Content for Your LMS \(And Not Regret It Later\)](#)

Source Links

1. [Zippia Onboarding Statistics](#)
2. [Training Magazine: Breaking the Ice from a Distance - The Power of Corporate Gift Giving During the Remote Onboarding Process](#)
3. [A New Look at New Hires](#)
4. [Core Beliefs and Culture](#)
5. [Time to Develop One Hour of Training](#)
6. [Blended Learning](#)



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For more information, visit [hsi.com](https://www.hsi.com)