

## 7.3: A Guide to Onboarding New Hires for First Time Managers

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### A Guide to Onboarding New Hires (For First-Time Managers)

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#### Summary.

Despite evidence that good onboarding matters, most managers and organizations don't get it right. A recent survey found that only 52% of new hires feel satisfied with their onboarding experience, with 32% finding it confusing and 22% disorganized. A poor onboarding experience can leave employees feeling uncomfortable, confused, and dejected. It could also make your employees less engaged at work. Reports show that disengaged employees cost businesses the equivalent of 18% of their salary. Addressing these gaps is vital for first-time managers to retain their teammates and maintain productivity.

Prepare them for the role. Start by preparing a detailed job description including any specific tasks, responsibilities, and expectations you have for your new employee within the first three months. Next, put together performance metrics that align with the job description. These metrics should be measurable, relevant, and achievable. Design a training schedule that progressively helps your new hire understand their responsibilities and achieve their goals. Finally, check in with your new employee frequently to assess their progress, address any challenges, and provide support as needed.

Help them integrate. Fostering a sense of belonging is a critical aspect of this integration. Organize in-person or virtual activities that range from games to virtual workshops, all aimed at promoting interaction and engagement among team members. Designate a member of the team to be the go-to mentor or "buddy" for your new hire. This mentor can also provide guidance, answer questions, and offer support, making the new hire feel welcomed and valued.

Re-onboard when necessary. As a first-time manager, it's crucial to recognize the signs of ineffective onboarding so you can address an employee's needs before it's too late. Red flags include your employee underperforming or seeming disinterested and disengaged, or asking too many questions and seeming confused.

Starting a new job is like jumping into a swimming pool. A refreshing and invigorating dive can make for a memorable experience, but a belly flop can cause a lot of pain and embarrassment. Whether employees dive gracefully into a new job, or belly flop into their role, can depend on their onboarding.

Onboarding is the crucial process through which new employees acquire the knowledge, skills, and behaviors needed to integrate into an organization. It begins with administrative tasks (such as paperwork) and first-day orientation, typically handled by HR. Then, there's role-specific training (such as shadowing another employee) and integration with the team (such as formal team introductions and informal social gatherings). This part of onboarding, which is typically handled by the new employee's manager, can help them build relationships, understand team dynamics, and feel a part of the organization.

If you're new to managing people, taking on a new employee's onboarding can be challenging. After all, you may still be figuring out your own role. But there are ways you can help your new employees have a positive onboarding experience that will set them up for long-term success on your team.

## Why (Good) Onboarding Matters

A poor onboarding experience can leave employees feeling uncomfortable, confused, and dejected. A recent [survey](#) by Paychex found that 52% of new hires feel undertrained after onboarding, with employees of small companies (66%) and remote workers (63%) suffering the most. This, of course, impacts productivity and retention. According to one [report](#), 51% of employees say they'd go "above and beyond" in their work if they had a good onboarding experience. A poor onboarding experience, on the other hand, could make your employees less engaged at work. [Reports](#) show that disengaged employees cost businesses the equivalent of 18% of their salary. And with disengagement comes quitting — a staggering [50% of newly hired employees](#) plan to leave their job soon, with that number skyrocketing to 80% for those feeling undertrained due to poor onboarding. On the flip side, only 7% of well-trained employees plan to leave soon.

Despite all of the evidence that good onboarding matters, most managers and organizations don't get it right. A recent [survey](#) found that only 52% of new hires feel satisfied with their onboarding experience, with 32% finding it confusing and 22% disorganized. Remote workers fare worse, with 36% of them finding the process baffling.

[Addressing](#) these gaps is vital for first-time managers to retain their teammates and maintain productivity.

## How to Optimize Your Onboarding Process

Managers don't always have control over every aspect of an employee's onboarding. For example, HR typically handles the more administrative parts of the process. In most organizations, however, managers do shoulder the responsibility of designing and implementing training specific to a new hire's role. They are also usually in charge of helping new employees integrate into their teams and providing ongoing onboarding support when necessary.

Here's how you can help create a smoother onboarding experience for your new hires.

### [Prepare them for the role.](#)

As a manager, you have the most in-depth knowledge of the job requirements of a new hire, and the dynamics of the team they're joining. To set your new employee up for success, you need to make sure they have the necessary tools and information from the get-go.

**Prepare a detailed job description:** This document should include any specific tasks, responsibilities, and expectations you have for your new employee within the first three months. You can reference the job description used to hire for the role to create this document, but it should be refined based on any new information you have. This step is crucial, as it provides the new hire with clarity about their role and what is expected of them. It also serves as a reference point for future performance evaluations.

**Establish performance metrics:** Next, put together performance metrics that align with the job description. These metrics should be measurable, relevant, and achievable, such as the completion of various trainings, adherence to timelines, number of tasks completed, etc. These metrics should provide a clear path for the new hire to understand what success looks like in their role. They should also help you to objectively assess your new hire's performance and provide constructive feedback.

**Plan a progressive training schedule:** Design a training schedule that progressively helps your new hire understand their responsibilities and achieve their goals. This could include a mix of on-the-job training, workshops, and mentorship programs. This step is important as it ensures that the new hire is gradually introduced to their role and responsibilities, reducing the risk of overwhelm and increasing their confidence and competence.

The cadence of the training schedule should be customized to what they need to learn as they are integrated into your organization. At first, the large majority of their activities will be centered around training, but gradually they will start doing more of the work and spend less time training.

Make sure to customize the schedule to the learning pace of the new hire: some learn more quickly, while others need more time to absorb new knowledge. This training schedule should naturally transition over time into the kind of professional development you offer every employee.

**Regularly follow up:** Check in with your new employee frequently to assess their progress, address any challenges, and provide support as needed. This could be through weekly check-ins or feedback sessions. Regular follow-ups can help you promptly address any issues and provide ongoing support, thereby enhancing your new hire's learning experience and job satisfaction. These check-ins can also be an opportunity for you to gauge the effectiveness of your training approach and make changes if necessary.

When meeting with your new hire, you can ask them:

- How are you settling into your role? Are there any aspects you're finding challenging?
- Do you feel you have a clear understanding of your responsibilities and expectations?
- Are there any areas of your job where you feel you need more training or support?
- How comfortable do you feel with the team dynamics and the company culture?
- Do you feel you have all the resources and tools you need to perform your job effectively?
- Do you have any suggestions for improving the onboarding process based on your experience?

If your employee raises any concerns or conveys that the onboarding process isn't going well, it's important to actively listen and take their complaints seriously. Make sure they feel heard and understood and ask clarifying questions if necessary. Then, express your commitment to addressing their concerns. You could say, "I hear you. What you're saying is that you still feel confused about how the payments tool works so it's difficult for you to submit the expense report. Thank you for sharing that, and I'll get Jon to give you another demo."

This proactive approach demonstrates that you value their input and are committed to their success in the organization.

### Help them integrate with the team.

Managers also play a pivotal role in integrating new hires into their teams and shaping their initial experiences and perceptions.

Fostering a sense of belonging is a critical aspect of this integration. When employees feel a sense of belonging, they are [more likely](#) to be engaged and productive. They feel valued and understood, which motivates them to contribute their best work. This sense of [belonging](#) also significantly increases employee retention as they are [less likely](#) to leave an organization where they feel they are part of the community and have positive relationships. Moreover, a sense of belonging can [positively impact](#) an employee's well-being. Employees who feel connected and valued are likely to experience higher job satisfaction and lower levels of work-related stress.

How can you help your new employee develop that sense of belonging?

**Organize in-person or virtual team-building activities:** These activities could range from games to virtual workshops, all aimed at promoting interaction and engagement among team members. You can also conduct informal catch-ups through virtual/in-person coffee breaks or lunches where team members can connect on a personal level, share experiences, and build relationships. This can help break down barriers and allow remote and hybrid workers to feel more connected to their colleagues.

**Pair new hires with seasoned team members:** Designate a member of the team to be the go-to mentor or "buddy" for your new hire. These more experienced colleagues can offer insider tips on navigating the team dynamics and the company culture. This mentor can also provide guidance, answer questions, and offer support, making the new hire feel welcomed and valued.

**Make meetings a safe space:** New hires may hold back their opinions, fearing that they don't have enough experience to speak up. It's important to ensure that new hires feel safe in sharing their views. Some of this relies on your team's dynamics and the level of psychological safety already in place. But you can also directly invite your new hires to express their thoughts. For example, you could say: "Let's hear from some of our newest members. I'm sure there's a point we're missing since we've been working on this product for so long. New perspectives can be very valuable."

Building a sense of belonging and community can be more challenging with remote and hybrid workers due to physical distance. Your goal is to create an inclusive environment where remote and hybrid workers feel as integral to the team as those who are physically present. By taking these steps, you can ensure that all team members feel heard, seen, and valued, thereby fostering a strong sense of community and belonging.

### Re-onboard when necessary.

Even if you put in the time and thought into how you'll effectively onboard a new hire, you won't always get it right. Different people may require different approaches, or a longer on-boarding period than others. As a first-time manager, it's crucial to recognize the signs of ineffective onboarding so you can address an employee's needs before it's too late. These red flags often manifest in various ways and can significantly impact your new hire's performance and integration into the team:

**The employee is underperforming:** If your new hire is consistently struggling to meet their performance expectations despite having the necessary skills and qualifications, this could be a sign of poor onboarding. You may also notice them making the same mistakes over and over again. If they were not properly onboarded, it's likely that they won't fully understand their role, responsibilities, or the standards they're expected to meet. They might have also been given information in a way that wasn't easily comprehensible.

**They seem disinterested or demotivated:** A new hire who seems disengaged or unenthusiastic might be feeling lost or overwhelmed. This could be due to a lack of proper introduction to the team or the company culture. They may have also been exposed to too much information with little time to process it and have had no clear [goals or milestones](#) set for them.

**They're often aloof and by themselves:** If your new hire is having trouble fitting into the team or building relationships with their colleagues, this could indicate that they didn't receive enough support or guidance during onboarding, or simply need a buddy to help them navigate the team and the culture.

**They ask too many questions or seem confused:** If your new hire frequently asks basic questions about their role or the company's processes or seem confused about what needs to be done and how, it might mean that the onboarding process didn't provide them with the necessary information.

These signs can show up at any stage, but they're often most noticeable within the first few months of employment. If you notice these red flags, consider re-onboarding your new hire. You can skip the administrative tasks and first-day orientation typically handled by HR, but a repeat of role-specific training could help improve performance. Revisit their job description together, redefine new goals and success metrics, and create an open forum for them to ask questions. You can also plan additional gatherings with your whole team to boost camaraderie and morale. This could also be a good time to reset team norms and make sure there are no toxic dynamics at play.

It may seem counterintuitive to repeat steps in the onboarding process. But research shows that re-onboarding works: [Employees become](#) more focused (47%), energized (42%), productive (34%), and efficient (33%) after being re-onboarded. Plus, re-onboarding increases employee retention by a whopping 43%.

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It's good practice to continuously evaluate and refine your onboarding process. Soliciting feedback from new hires, conducting surveys, or hosting focus groups can provide valuable insights into what worked well and what could be improved. By iterating the onboarding process based on feedback, you can ensure that it remains effective and relevant, ultimately leading to higher employee satisfaction and retention rates.

A thoughtful and engaging onboarding experience is the foundation for employee success, particularly for remote and hybrid workers who face unique challenges. By investing in a comprehensive onboarding process and providing ongoing support of the areas you control of role-specific training and team integration, you as a young manager can foster a motivated, well-trained, and loyal team that is ready to contribute to the organization's growth and success.

Source: "[A Guide to Onboarding New Hires \(For First-Time Managers\)](#)", Harvard Business Review, July 11, 2023.

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