

Onboarding 101

Everything you need to know to help your groups implement a successful onboarding strategy.

What is Onboarding

Onboarding is the action or process of integrating a new employee into an organization or familiarizing a new customer or client with one's products or services.

What does onboarding look like?

Most HR administrators have spent time thinking about onboarding. At the surface, onboarding looks like a string of a few simple tasks at the beginning of someone's term of employment. In reality, a successful onboarding process "spans from several months to a full year and includes constant communication, feedback, and performance measurement."

In this lesson, we will review the importance of onboarding, what to look for in onboarding technology, and what a successful onboarding process entails. You will also learn how EaseCentral can strengthen the onboarding process.

The Importance of Onboarding

We've noticed that employers are showing an increased interest in implementing onboarding strategies and software. This is likely because an onboarding program can be greatly beneficial for the long-term financial and cultural success of a business.

1. Longer Employee Retention

Investing in a strategic onboarding process can increase the tenure of employees. A recent study found that 69% of employees were more likely to stay with a company for at least three years if they had a positive onboarding experience. This is particularly useful because turnover is costly, especially when thinking about conducting interviews, extending offers, and training new hires.

2. Higher Productivity

Companies with a standard onboarding process experience 54% greater new hire productivity, and employees of those companies that have the longest onboarding programs gain full proficiency 34% faster.

3. Happier Employees

Happy employees reinforce a positive work environment. Strong onboarding programs help employees engage with one another and understand how their roles

work together. This can lead to office friendships, which also contribute to a positive work environment.

4. Better Employee-Manager Relationships

Managers experience less stress and greater satisfaction with new hires after the implementation of an onboarding program. This is because onboarding programs give employees the resources they need to succeed earlier, as well as outlets to ask questions.

The Onboarding Process

Now that you've learned about the importance of onboarding, let's review what successful onboarding program looks like, step by step.

For the purpose of this course, we'll review the process of onboarding an employee from the time they are sent an offer letter to the end of their first year. We've included how Onboarding with EaseCentral, included with each broker subscription renewed or bought after March 2017, can play a part in each step as well.

1) The Official Offer

Employers should include as much information as possible when extending an offer. This includes salary, start date, team structure, and benefits eligibility.

With EaseCentral

- The Offer Letter Flow available through Onboarding with EaseCentral includes the ability to create and send personalized offer letters. HR admins can use this feature to extend an offer letter to a new applicant with specific details like salary and start date via the system. The employee can send the offer back to the employer and officially accept the new position via e-signature.
- HR admins can choose to show an applicant the benefits they are eligible for before they accept an offer.
- HR admins can also allow the applicant to begin the onboarding process after they accept the offer. This will allow them to log in to EaseCentral and begin entering required information.

2) Preboarding

The second an official offer is accepted, employers should begin acclimating a new employee. This is also known as "pre-boarding." Pre-boarding can include explaining

the company mission, company structure, and the responsibilities the new employee will be expected to tackle in their first six months. These steps can ensure that the employer and employee are on the same page, and that both are working toward the same goals.

With EaseCentral

HR admins can use Onboarding with EaseCentral's Custom Documents feature to send new employees educational materials like a flyer about the company structure or a company handbook, all before their first day. These documents can be sent at any time via EaseCentral, and the HR admin can choose to require a signature or review too. They can also be configured to send with an Offer Letter, but only be displayed if an offer is accepted.

3) Required Documents

Once an employee has accepted their offer and is on their way to being acclimated with their new role and company, it's time for them to complete any information that is required by their new company, the IRS and/or U.S. government documentation. This includes:

1.

1. **W-4 Form:** An Internal Revenue Service (IRS) tax form completed by an employee in the United States to indicate his or her tax situation (exemptions, status, etc.) to the employer. The W-4 form tells the employer the correct amount of tax to withhold from an employee's paycheck.
2. **I-9 Form:** Also known as the Employment Eligibility Verification, this form is used to verify the identity and legal authorization to work of all paid employees in the United States. All U.S. employers must ensure proper completion of Form I-9 for each individual they hire for employment in the United States. This process is usually completed by the employee submitting proofs of legal status such as a driver's license, passport, birth certificate, or social security card.
3. **Employee Information and Emergency Contacts:** For legal purposes, most companies require a new employee's full name, phone number, email, birth date, address, and social security number. Many companies also require each employee to provide emergency contact information.

Additionally, HR admins must complete W-2 forms for each employee. The W-2 form is an Internal Revenue Service (IRS) tax form used in the United States to report wages paid to employees and the taxes withheld from them. Employers must complete a Form W-2 for each employee to whom they pay a salary, wage, or other compensation as part of the employment relationship.

With EaseCentral

- Each employee can complete their profile in EaseCentral and enter personal information necessary for online enrollment. They can also add emergency contacts.
- Employees will also be able to complete W-4 information and submit documents for their I-9 forms through EaseCentral. Employers and HR admins can use the rules-based system to ensure completed and signed W-4 and I-9 forms. All of this information will be stored securely in EaseCentral.

Raina Sheth

MarketingCity, CA

- Profile
- Contacts
- W-4
- I-9
- Sign Forms
- Finish

W-4 Tax Information

Use the [W-4 Worksheet](#) or [IRS](#) c

FILING STATUS	Married
LAST NAME DIFFERENT?	<input type="checkbox"/> Yes, last name shown on so
DECLINE WITHHOLDING?	<input type="checkbox"/> Yes, decline
WITHHOLDING ALLOWANCE	1
ADDITIONAL WITHHOLDING	\$0.00

4) Collect Payroll Information

To pay employees with direct deposit, employers must collect their bank information. They typically collect the bank name, account number, and routing number. This information is needed during the onboarding process to ensure prompt payment to the new employee.

With EaseCentral

Employers can collect direct deposit information during the onboarding process. This feature uses the same rules-based system we mentioned earlier to ensure accurate bank account information.

5) Benefits Enrollment

Employees should enroll in (or waive) benefits during their first few days of work.

With EaseCentral

If an employee completes onboarding with EaseCentral's Onboarding feature, they will be prompted to begin online enrollment with EaseCentral. Here, they can review their benefit options, view side-by-side plan comparisons, cost per pay period, and informational videos and brochures. The rules-based system we mentioned for required documentation also applies here, reducing the administrative burden on HR.

6) Explain the Company Culture

Once a new employee has completed all the mandatory and legal steps for onboarding, it's important to remember to continue communicating information that will help them succeed beyond their first few days.

The quicker an individual acclimates to company culture, the quicker they'll adapt to the rest of their role. This is because they will promptly learn the proper channels to ask questions, who to approach for training and advice, and how policies involving PTO and working from home operate.

To help this cause, employers can pair each new employee with a veteran employee who can provide insight into how the company works from every angle. With a dedicated person to ask questions, a new employee will likely adapt to company norms quicker.

7) Collect Feedback

Almost 1/3 of employees begin searching for a new job within six months of starting their current job. There can be several reasons for this, including surprise expectations, knowledge gaps, and team structures.

Unfortunately, many of these reasons are left unsaid. To help an employee succeed and decrease turnover, employers should conduct surveys or set up meetings with new hires every 2-3 months during the first year.

These meetings and surveys should include questions like:

1. Do you have questions about any company policies?
2. Are you working on projects that you expected to be working on?
3. What is something you'd like to be working on that you currently are not?

4. How can we help you become better acclimated with our company or your role?
5. Are you making progress in building a relationship with your manager?

With EaseCentral

If your groups are using [HRIS by EaseCentral](#), they can use the surveys feature to collect feedback.

Onboarding Technology

Employers are increasingly adopting onboarding technology to assist with building onboarding programs. Onboarding technology can help efficiently complete the required aspects of onboarding that we mentioned above, so employers and their HR admins can focus on the more strategic pieces. This is definitely something we recommend all businesses explore.

The following are some key considerations for choosing onboarding software:

1. **Cost:** Employers should determine their budget (or if they even have one) for onboarding technology.
2. **Ability to Sync:** Employers should ensure that the onboarding technology they choose works well with their other HR and benefits technology software.
We recommend picking software that can sync with payroll management or benefits administration. This way, employers don't have to juggle multiple logins or worry about learning different systems.
3. **Training and Implementation:** If the software requires employee action, ask about tools and guides that can help the entire company adapt to the new technology.
4. **Efficiency:** Will the onboarding software help cut down the amount of time and administrative duties? Look for features like online document storage, electronic forms with e-signatures, employee records management, and even tools for hiring, like applicant tracking or offer letters.
5. **Security:** Employers should ensure that the software they choose keeps their data secure and their employees safe.

Did you know? EaseCentral has an Onboarding feature that is included with every EaseCentral broker subscription. Onboarding with EaseCentral is seamless, completed entirely online, and syncs with online enrollment, which means that you can offer your groups a technology solution that does not require an additional cost, set up, or login.



ease
onboarding

Enable

Cancel

Pro Tip: Companies like Rippling are using Onboarding software to force their way into your groups, just like Zenefits. Be proactive and offer your groups a solution today.

That's a wrap for Onboarding 101. We hope this course taught you more about onboarding and how you can help your groups build a successful onboarding program.