Fact Sheet

Supporting New Hire Reports

OnBoarder Plus

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OnBoarder New Hire Report

This workbook supports individual OnBoarder reports. It has been designed to support OnBoarder Users (HR or Line Managers) explore the engagement levels of new hires.

It sets out a range of tips and questions that you can use as part of a 1 to 1 discussion with the new starter. These tips and questions will help you to explore how engaged they are at present and what steps are needed to make them feel more engaged going forward.

⋛ Overall Tips

- Use this workbook, and the OnBoarder individual report, to support your preparation for the conversation.

- Be clear about how confidential the discussion is, i.e. if you work in HR will you share anything with their line manager? If you are taking notes, explain what will you do with these.

- If you work in HR, ensure that the individual is completely comfortable with their line manager being part of any subsequent conversation.

- At the end of the meeting, summarise the key points and agree what actions will be taken as a result of the conversation.

- Ensure a follow-up process is in place to check that the actions have been taken and that the individual is happy with the outcome.

The rest of this document requires you to have an individual new starter report to hand. An example report can be found at www.onboarder.com/product

Onboarding Profile – Page 2

1. Engagement

On page 2 of the personal new hire report, one of three levels of engagement will be shown:

- **Leaver** ~ Leaving due to factors outside their control or the job was always a temporary position.

- **At Risk** ~ Undecided about or dissatisfied with working here

- **Engaged** ~ Currently focused on their career at your organisation.

In the reports this section will only highlight factors for two types of new starters:

- For **Engaged** starters, there will be a list of likely **Retention Factors**

- For **At Risk** starters, there will be a list of potential **Turnover Drivers**.

- If they are a **Leaver** then no comments will be shown.

At Risk Turnover Drivers

⇟ Tip

Work with the individual to identify the main priorities within this list. Ensure you focus on actions that combine some 'quick wins', as well as plans to address the more complex/organisational issues. This approach is likely to make the individual feel their concerns have been heard and confident that they are being addressed. Please see page 3 onwards for example questions to explore the Turnover Drivers.

Engagement Retention Factors

⇟ Tip

Work with the individual to highlight which aspects of the list are particularly important to them and then agree what needs to happen to keep these aspects of their engagement high in future.

Explore if there were any areas that they felt dissatisfied with or unhappy about during the different stages of their onboarding process. If there are any particular areas, use the questions provided for exploring the At Risk Turnover Drivers (see page 3 onwards).

Questions

The following sets out a list of possible questions to explore for the 12 core engagement areas:

The pay and benefits package

Before the meeting

- How confident are you that the individual has been brought in at the right level?

- Have the correct pay scales and benefits been applied?

- Familiarise yourself with any industry benchmark data you have.

During the 1-to-1

- What is your understanding of your pay and benefits entitlements?

- What is your expectation in relation to pay and benefits? Has this changed since agreeing your terms and conditions?

- Explain when the next pay and benefits review will be, and clarify how it will work

- Ensure that the individual properly understands how and when any performance-related pay/bonuses operate

- Explore and challenge any perceptions of inequity the individual may hold (e.g. by comparing themselves with others).

Potential for progression through the organisation

Before the meeting

- How is the individual actually performing at present?

- What feedback discussions have they had so far?

- How clear is their line manager about career paths and promotion criteria within the organisation?

- What are the opportunities and timescales for progression? How likely is any immediate progression?

During the 1-to-1

- What are your career aspirations? E.g. What role do you want to be doing in 12 to 18 months?

    o Explore with them how realistic this aspiration is.

- How do you think you are currently performing?

    o What feedback have you received?

- What potential opportunities are you aware of?

- How aware are you of career development initiatives and opportunities? E.g. secondments, job rotation, etc.

Training and development opportunities

Before the meeting

- What strengths and development needs did the recruitment process highlight for this individual? Has the manager gone through this feedback with them?

- Is a personal development plan already in place? If not, why not?

- What training courses or programmes should the individual have been registered for/already attended?

During the 1-to-1

- What is your understanding of the development opportunities available to you?

  o Explore work-based activities such as having a mentor, taking on new work assignments, job shadowing or more regular 1-to-1 meetings

- Have you got a development plan for the next 12 months?

  o If yes, let go through this to review its quality

  o If no, what needs to happen to create one?

- Go through the list of programmes they should have already attended to identify any gaps in their training

  o Clarify other training courses that are available to the individual.

- What are the wider development opportunities available (i.e. outside of formal training)?

  o What projects/initiatives would you like to work on that would stretch you?

  o Who would you like to spend more time working with, as you feel you can learn from them?

Work-life balance

Before the meeting

- Check their current working hours. How does this tally with what was advertised for the role/what they should typically be doing?

- Is there anything that could be having a short-term impact on their work-life balance (e.g. a major project deadline)?

- What is your policy on flexible working?

    o And what is their manager's attitude towards this?

During the 1-to-1

- What factors are affecting your work-life balance?

    o How is this impacting you personally? E.g. working late impacting on child-care

- Do you feel any particular aspects of work are placing more demands on you than you expected?

    o Explore which aspects of the role are responsible for these demands (e.g. travel to client sites, unreliable IT, etc.)

- What changes would help improve your work-life balance?

    o This should include exploring what development support might help them, e.g. prioritisation, time management/personal effectiveness, ability to say no

- Are any flexibility initiatives your organisation operates not working out as the individual expected (e.g. job-sharing, working from home, etc.)?

Relationships with your colleagues

Before the meeting

- Nothing specific

During the 1-to-1

- What are your initial observations about the people you are working with?

    - Who do you respect most? How can you get to work more with this person(s)?

- What specific elements of the relationships are not right? E.g. the quality of work/competence of certain colleagues, their experience or qualifications, conflicts with team-members or others, etc.

    - Explore this sensitively, understanding the likely reluctance of the new starter to name names

- Have you been introduced to everyone you feel you should have been since joining?

- How good a relationship network do you feel you are developing around the business?

    - Where is this working well/less well and why?

- How good is their network of approachable 'experts'?

    - How could this be improved?

- What chances have you had to learn from their more experienced/established colleagues?

    - If useful, how can you get more opportunities like these?

- What are their social expectations in relation to work?

    - How well are these being met?

The nature of the work itself

Before the meeting

- Make sure the manager has a copy of the relevant job description and check they have already been through this with the individual. Clarify if anything has changed since the person joined

- Be clear about the value of the employee to the organisation. If they are already seen as top talent, what other opportunities might exist for them?

During the 1-to-1

- Which elements of the work are you finding:

    o Most enjoyable? Why?

    o Least enjoyable? Why?

- If there was one thing you could change to make your work more satisfying, what would it be?

- How well has the reality of the job matched your expectations of it?

    o They have already answered this in the questionnaire, see *Section B Meeting of Expectations*. Explore whether any mismatch is a result of misinformation provided by the organisation, or a more general impression held by the individual which you can explore and challenge appropriately

- How well do you feel your skills are a good match for the requirements of the job?

    o If not, what training and development might be suitable?

- How clear are you about how you contribute to our organisational performance?

    o Understanding how they personally contribute and impact organisational performance (i.e. knowing how they make a difference) can increase the meaningfulness and importance the individual attributes to their work

- What other roles would interest you? Why?

Confidence in the organisation

Before the meeting

- Make sure you know what your current reputation is as an employer, e.g. ask your recruitment team, check employee engagement data, etc.

- Check how this is being positioned within the recruitment process.

During the 1-to-1

- What is your overall perception of the organisation to date?

    o What have you liked most?

    o What have you liked least?

- Explore how clear they are about the organisation's vision/mission, strategic goals, and your core offerings. Provide missing pieces of information to help build a more complete understanding

    o What do you understand about what our organisation stands for?

    o How would you describe our brand/image?

- How has your perception changed since you joined?

    o What has happened to cause this change?

    o What can be done to make this perception more positive?

    o If appropriate/necessary, provide a different perspective, e.g. walk them through the organisation's successes, its values, feedback from others

- How effective do you feel communication of major organisational announcements is?

    o Make sure they know where the sources of information about the organisation are, e.g. intranet, monthly forums, etc.

    o Clarify any points of misunderstanding or ambiguity relating to recent organisational decisions

The physical working environment

Before the meeting

- Check the individual has got all the necessary equipment, and have received all appropriate training for it

- If you conduct any kind of ergonomics/health and safety briefing, check whether they have received this

- Make sure there are no issues relating to disability or Health and Safety

- Are there any simple changes that can be made?

During the 1-to-1

- What specifically is missing from/could be improved in your working environment?

  o Is there anything simple that could be changed? E.g. additional equipment, they sit directly underneath an air conditioning unit, lighting, etc.

- How are our systems or processes supporting you in doing your job?

  o If there is any level of frustration, what is causing this? E.g. is this a result of a knowledge gap on their part, or a more widely acknowledged frustration felt by others?

  o How could the system or process be improved or optimised?

- Do you have all the necessary equipment to do your job?

  o It is all working correctly?

  o Do you know how to use it correctly?

- What one thing would improve your working environment?

Relationship between employees and senior management

Before the meeting

- What experience of your senior management team has the individual had, i.e. how visible is the organisation's leadership team?

- What does your employee engagement/survey data tell you about the relationship between senior management and other employees?

- How senior is the new starter's role itself, i.e. how much exposure to senior management should they be having?

During the 1-to-1

- What expectations do you have in terms of relationships with senior management?

- Are there any specific interactions/incidents that have shaped your view of them?

    o Does your view apply to senior management in general or specific individual(s)?

- To what extent do you feel senior management live our values and are good role models?

    o Explore any specific examples (positive role modelling as well as any areas where they feel the values aren't lived)

- To what extent do you trust senior management to act in the interests of and for the well-being of employees?

    o If not, why not? What evidence can they provide?

    o If it is just a general impression, explore and challenge appropriately.

What we do as an organisation

Before the meeting

- Make sure you know what your current reputation is as an employer, e.g. ask your recruitment team, check employee engagement data, social media source (e.g. Glassdoor), etc.

- Check how this is being positioned within the recruitment process.

During the 1-to-1

- What is your overall perception of the organisation to date?

    o What have you liked most?

    o What have you liked least?

- How clear are you about our organisation's vision, mission, strategic goals and our core offerings? (Provide missing pieces of information to help build a more complete understanding)

    o What do you understand about what our organisation stands for?

    o How would you describe our image?

- How has your perception changed since you joined?

    o What has happened to cause this change?

    o What can be done to make this perception more positive?

The degree of autonomy in your role

Before the meeting

- To what extent is the role constrained by a set of processes or procedures that might be perceived as reducing freedom and independence of working?

- What is their manager's style, e.g. how directive is it? What development does the manager need to enable them to adopt a more coaching approach (if suitable for the role)?

- Explore with the manager how they are managing the individual and ways in which they could relax a degree of control and give the individual greater responsibility (even if these are only small things)

During the 1-to-1

- What aspects of your work would like to have greater autonomy in and responsibility for?

  o How realistic do you think this is?

- What ideas do you have about how the role could be approached differently?

  o What is stopping you from being able to experiment with these?

- If you could change one aspect of your manager's behaviour/style, what would it be?

- Encourage the individual to give their manager feedback on which aspects of their management style they particularly value.

Relationship with your line manager

Before the meeting

- Who is their line manager? What do you know about this individual, e.g. what other feedback has there been about their style and skills?

- Are there any specific reasons why the person may not have interacted much with their line manager yet? (E.g. only just been appointed as the individual's manager, the line manager has been working away on a project or on secondment, etc.)

During the 1-to-1

- How would you describe your relationship with your line manager?

    o What do you value most about the relationship?

    o What do you find most frustrating about it?

- How regularly do you meet with your manager?

    o How effective do you find these meetings?

    o How often would you like to be meeting?

- What one thing would you change about the relationship?

- Explore the option of an additional mentor or a buddy relationship.

- Explore if there are any specific issues, e.g. in terms of approachability, feedback on their performance, setting a good example of behaviour?

    o If so, is this isolated feedback, or a more common occurrence that needs feeding back to the line manager appropriately.

Onboarding Profile – Page 2

Pre-Joining Expectations

1. Job Expectations

Unless the individual has rated this as a *Very close fit or No expectations*, you should explore this area.

Close Fit

- What would need to happen to turn this into a *Very close* fit?

Okay

- What aspects of the job have met your expectations?

- Which features have not lived up to your expectations?

    o Why do you feel these aspects haven't lived up to your expectations?

- If you had to choose **one** aspect, which one change would make you feel your expectations of the job have been better met?

Poor Fit

- What were your expectations before you joined?

    o Explore with them how realistic these were

- At what point did you feel your expectations weren't being met, e.g. straight away, after a particular incident/event, etc.?

- How accurately do you feel the job was advertised?

- How accurately do you feel the job was positioned during the different stages of the recruitment process?

    o Were any aspects of the job not explained/covered?

- What needs to happen to create a better match between your expectations and the reality of the job?

2. Organisational Expectations

Unless the individual has rated this as a *Very close fit* or *No expectations*, you should explore this area. In discussing this area, try to focus on different elements of the organisation, e.g. culture, values, reputation, what you actually do as an organisation.

Close Fit

- What needs to change to make this a *Very close fit?*

Okay

- What aspects of our organisation have met your expectations?

- Which features have not lived up to your expectations?

    o Why do you feel these aspects haven't lived up to your expectations?

- If you had to choose **one** aspect, which one has:

    o Most lived up to your expectations?

    o Failed to live up to your expectations?

Poor Fit

- What were your expectations before you joined?

    o Explore with them how realistic these were.

- At what point did you feel your expectations weren't being met, e.g. straight away, after a particular incident/event, etc.?

- How accurately do you feel different aspects of our organisation were positioned during the recruitment process?

    o Were any aspects of our organisation not explained/covered?

- What needs to happen to create a better match between your expectations and the reality of our organisation?

Performance

The Performance section looks at four crucial elements that drive performance, including:

- Clarity ~ how clear the new starter is in relation to what is expected of them and how their performance is measured,

- Confidence ~ the extent to which they feel they will be successful

- Enablement ~ the extent to which they feel they have the level of support they need

- Impact ~ and finally, how well they think they are actually performing.

The table on page 2 of the OnBoarder Individual Report provides a summary of the new starter's responses to the Performance section of the questionnaire. Full details on how to explore these aspects of the report are set out on the next page (page 18-20) of this document.

Performance Profile – Page 3

⋛ Tip

- If the new starter has already had a formal review, ensure you know what rating they received. If they haven't received a formal review yet, ask the line manager to use the OnBoarder rating scale to indicate where they would place them.

- It may be worth starting with the Impact (overall rating of performance) section and their comments, use these to guide which of the other three areas you explore next.

- Except where performance is high and ratings are positive in all aspects, this conversation will be most valuable if the line manager is involved.

  o In each instance, you will need to think about the best way to ensure the new starter feels comfortable with this – e.g. is it just them and their manager, do you have a conversation with the manager first, is it all three of you in an initial conversation?

  o If the starter is immediately comfortable for their manager's involvement, it might be worth involving them straight away rather than following an initial conversation.

Scale: Impact

All ratings

- What evidence have they based their rating on?

  o What feedback have they had to date?

  o If you spoke to the line manager in advance, how does his/her view compare with the starter's self-rating?

- How often to do they meet with their line manager?

  o How helpful are these meetings?

  o What would make them even more helpful?

  o How often would they like to meet?

Above requirements

(assuming this aligns with the line manager's view)

- What are your aspirations for the next 12 months?

- What one thing can you do to perform even better?

Meeting the standards

- What aspects of your job do you feel they are doing well?

    - What would help you do these aspects even better?

- Which aspects are you finding more difficult?

    - What will help?

    - What support do you need?

Below requirements

- What aspects of your job do you feel they are doing best on?

    - What would help you do these aspects even better?

- Which aspects do you feel you are not quite meeting the standards on?

    - What would an improvement look like?

    - What will help achieve this?

    - What support do you need to ensure this happens?

- On a scale of 1 to 10 (where 10 is very high), how confident are you that you can succeed in this role?

    - What would increase this confidence by just 1 point?

    - (If lower than a 7) what would increase it by 3 points?

⋚ Tip

- Use their answers to the above questions to determine which areas of Clarity, Confidence and Enablement to explore next.

- If they really don't believe they will be successful, to what extent do you need to have an honest conversation about them leaving (so that this can be done positively, rather than end with them being managed out)? If yes, what can you do with them to ensure this is a positive experience for them and the organisation?

Scales: Clarity, Confidence and Enablement

⋛ Tip

- Remember to focus on what is working well – get them to summarise what is working well in each area.

- In exploring the Unsure and Negative responses, focus on the areas that will make the biggest difference rather than going through all of them. For example:

    o In terms of Confidence, which of the areas that you marked as Unsure or No do you feel are most important to how you are performing?

- Remember to explore what they need to take responsibility, as well as what their line manager/the organisation needs to do.

Own Words – Page 5

At the end of the individual report, you will find the individual's responses to the following open questions:

- What do you enjoy most about your job or where you work?

- What, if anything, do you dislike most about your job or where you work?

⋛ Tip

Ensure you have read these comments before meeting the individual, as their comments may provide some additional insight into their responses to other sections of the questionnaire.

Note

The Recruitment and Induction sections of the OnBoarder questionnaire have been designed to identify **themes** for improvement in the overall recruitment and induction process. As such, no details are included in the individual report, other than the overall measure shown in Section 1 of the report.

Group reports are available from great{with}talent that provide a detailed breakdown of the new starters' view of both these processes.

⋛ Tip

You can still explore these briefly with the individual. If the individual has rated these areas as strong, ask them what one thing they found particularly positive/effective. Similarly, with lower ratings if only one thing was changed to improve the experience, what would they recommend?