

**Purple Sky**  
C o n s u l t i n g

# **Guide to Brilliant Onboarding**

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### Introduction

If you have been following my [Top 5 Tips for Brilliant Onboarding](#) from the [Purple Sky Thinking Blog](#) you'll already know the importance of getting the onboarding experience right. Onboarding can't just be a paper exercise focusing on compliance, it needs to go beyond the first few weeks and it needs to deliver.

This guide and the supporting preparation template will help you create brilliant onboarding experiences.

My Top 5 Tips form the structure of this guide. Here is a reminder of each of them. You can navigate the guide by selecting which area you want to focus on.

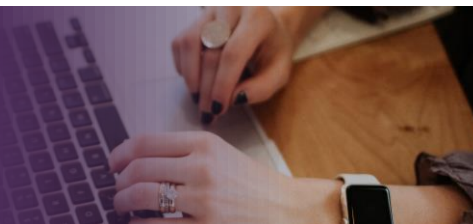
Accountability where it belongs



Stay connected



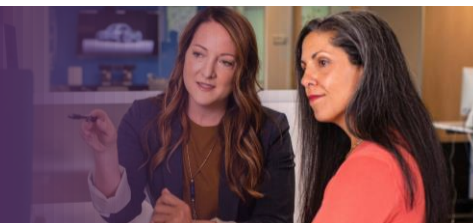
Get the basics right



Orientation matters



Set them up for success



### Accountability where it belongs



**Hiring Leaders** – You must be clear on your responsibilities for the quality and delivery of the onboarding experience for your new or returning colleague. If the experience is brilliant, you will be remembered for it. If it's not, this will stick too. This onboarding is one of the first moments that matter, and it will set the tone for their overall experience.

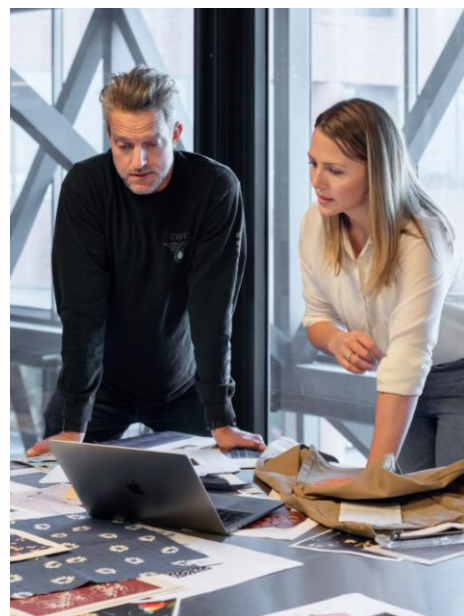
Start by thinking about how you want to be remembered for this onboarding experience. Use the preparation template to capture your aims and intentions.

### People Team Partner/Hiring Leader Together

– Connect and work through the ideal requirements for this onboarding experience. You can use the preparation template to capture who will do what and identify where you'll need support.

This will help you clarify what needs to happen and when.

Start these discussions as soon as you have an agreed start date. It should be no later than one month before the start date, to ensure you all have enough time to prepare for a brilliant experience.



Being clear on who is doing what and when and creating a comprehensive plan will be essential to the overall onboarding experience. Sharing it with your colleague in advance will build their confidence and their excitement for their new start.

### Stay connected



Start building the relationship from the moment of appointment. This will give you a head start with the new or returning colleague and it will help them feel closer to you, their team and the organisation, even before they officially start.



This reduces the risk of drift whilst they are serving their notice period. It helps them to feel involved and excited about their new opportunity.

This is especially important for those returning to their role after a period of absence.

You may not know what is happening in their world, but it's essential you get their consent to engage in pre-onboarding activity and make sure they don't feel under pressure.

After they've accepted your offer, arrange an initial call or in-person catch-up to actively involve them in an approach to stay connected until they start.

It might help to have some ideas ready, there are a few on the next page to get you thinking. Share your ideas with them, and ask them what would be good for them. They should feel under no pressure to do anything and you can adjust your approach to reflect what they are comfortable with.

Based on the conversation, prepare a plan of the agreed activities and share this with them.



*Remember to take care if you are using your colleague's personal information when making arrangements. Check you have their consent to add them to group invites or before you share it with someone else.*



### Stay connected

Here are a few ideas to get you thinking about pre-onboarding activities to help you stay connected.

The preparation template with this guide provides a space to capture your ideas so you can then discuss them with your colleague before confirming a final plan.

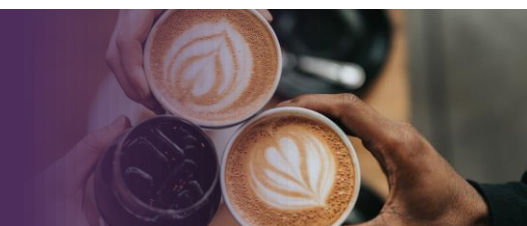
**Invite them to meet the team** – this could be for a team event, a strategy session or just for coffee.

**Schedule check-in calls** – this is an opportunity to start building your relationship. You can use the calls to answer any questions they have, begin sharing with them the onboarding experience and share a bit about the work you are focused on.

**Send them a congratulations card and welcome pack** – if you have the resources, send them a card and a gift as a welcome. This is a great way to create a connection.

**Actively discuss the support they'll need** – it may be they require some adjustments for their working space, or if they are going to be leading a team, they could benefit from development and coaching – my **Boost** Leadership Onboarding Experience could help you here.

**Ask them how they'd like to connect** – they may also have some ideas about the best way to connect to be included in the plan.



### Get the basics right

Nothing is more frustrating on your first day than not having the basics you need.

It has a noticeable impact on new starters, they may be forgiving, but it will impact their confidence in the organisation and possibly you.

Make sure you make the basics simple. Providing clear instructions will set your new colleague up to be independent and will avoid them having to spend 3 hours on the telephone with IT on their first day.



You can use the preparation template to capture all the basics required for a brilliant first impression and to enable your new or returning colleague to perform.

You can start by considering these key areas:

- What equipment do they need
- What systems do they need access to
- What physical spaces do they need access to
- What office or desk space will be required
- Anything else they will need from day 1

Make sure you consider where the new or returning colleague will be working from on their first day and make arrangements to ensure the basics are in the right place at the right time.

### Orientation matters

Helping your colleague feel at ease in their physical and virtual workplace is essential. The quicker they are settled and orientated, the easier it will be for them to perform successfully.



Orientation is more than a quick tour through the office or front page of the intranet; It is an opportunity to make a positive impression on your colleague by demonstrating your care and attention to them feeling at ease in their surroundings.

Think of the following areas, listed below and on the next page, when you are developing your orientation for a brilliant onboarding experience. Make use of the preparation template to capture your orientation plan.

Explore **the physical spaces** together – show them how to access the building safely, where the essential facilities are and share any information required to use them, e.g., paying for lunch, booking meeting rooms etc. You can use this as an opportunity to build your relationship by sharing where you like to go for lunch or a walk to get some thinking time.

Consider **inclusion with your orientation** and don't make assumptions – show them where all the facilities are, not just the ones you use, e.g., when it comes to the toilets, show them all genders (if they aren't already gender-neutral) and this includes the disabled facilities – you may not know what they need to use, so showing them all facilities allows them to feel included.

This sets a great example of how they can help others feel included and supported. This isn't just about toilets though, be clear about all the facilities available and visit them all.





### Orientation matters



**Online orientation** is often more complicated, but it is critical. Most organisations have extensive intranets or apps.

Help new starters or returners understand how to navigate these and make the best use of them so they can be independent and, therefore, ready to perform successfully.

**Introductions** – maybe not necessarily the relationship-building needed to deliver their responsibilities but those key people who will be their support network, e.g., the receptionist, the PA, the travel Booker and if they lead people, their People Team business partner.

These people will help your colleague waste less time and create a safe and welcoming space in their first few weeks.



Assign them a **welcome buddy** – this is a great way to help someone orientate well by giving them a key contact, in addition to you, for those quick questions to help them settle in.

This person may also be able to point out some of the 'need to know' in terms of the team's ways of working or deciphering the numerous acronyms.



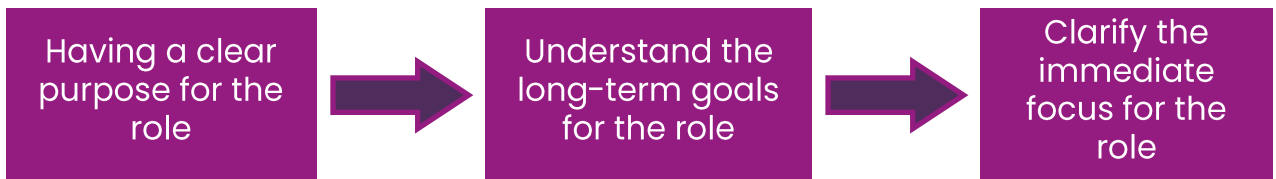


### Set them up for success



My definition of successful onboarding is: “giving someone access to the **information, resources, relationships, insights, support, and development** they need, in a way that enables them to perform their role successfully.”

A great way to structure what is required for a successful onboarding is to clarify the **purpose** and **goals** of the role. You can use the preparation template to capture this and then use it to guide your thinking to set your colleague up for success.



#### Purpose of the role

You should have already identified this in the hiring process but it may not be the case for a returning colleague. If you already have it, great; if you don't, here's your opportunity to be clear about the purpose of the role from day one.

Articulate the purpose of the role by identifying the required impact of the role; this will guide the activity and behaviours of your new and returning colleague so they can achieve the required impacts of the role.



#### Goals - Part One - Long-term performance

Be clear in setting the expectations for your new or returning colleague. Ensure the required performance includes outcomes and behaviours, as it is not just about our impact on results but the way we achieve those results.

This will help your colleague develop their longer-term strategy and plans for the role by being clear on these expectations upfront.

### Set them up for success



#### Goals - Part Two - Immediate focus

The purpose and long-term goals are about setting the direction for the role. This immediate focus emphasises the need for the new or returning colleague to integrate into their role successfully.

Don't try and jump to the long-term but allow the onboarding process to be effective by enabling them to get to grips with the situation and the role.

This needs appropriate time and attention so the long-term performance and the purpose of the role can genuinely be delivered.

Of course, you want to enable and empower colleagues to accelerate to success but this has to be done in a supportive and focused way if you don't want to lose them early.



One of the common factors in new starters leaving their role in the first 12 months is they didn't feel they were achieving and therefore they didn't feel the role was for them.

Having immediate goals to focus on, which are achievable within the onboarding period will enable them to feel they are making a difference.

Look at what is required in the first 12 weeks and then the rest of the first year to set them up for long-term success. Be realistic, and supportive and give them regular feedback throughout this time on how they are doing.

### Set them up for success



Now you have clarity on the purpose and goals, you can consider the six components (information, resources, relationships, insights, development and support) required for successful onboarding.



For each of the six components, ask yourself these questions:

- What do they need to enable them to be successful?
- How can I help them understand this to enable them to be successful?
- Is this an immediate need (first 12 weeks or first year)?
- Is this a longer-term need (they don't need this immediately, but it's useful for them to be aware of it)?
- Are there any adjustments they need from day 1 to successfully enable them to interact with this (discuss this with them)?
- How could they use this to enable them to be successful?

These questions will help you pinpoint and prioritise what will enable them to be successful.

Use the preparation template to capture what you need to collate, ready for the onboarding experience to start.

Aim to have everything you've identified ready and available to be shared with your colleague in their first week.

By preparing the six components in this way, you'll provide structure and understanding to enable your colleague to feel supported and more readily prepared to perform.





## Here's a quick reference point to help you in creating a brilliant onboarding experience\*

Congratulations! They got the job and you've found a great colleague! But what next?

Here's a quick summary of what you should be doing when. Use the preparation template to help you plan and take action.

**12** WEEKS  
TO GO

- The start date is confirmed - send a congratulations card or welcome gift.
- Capture your intentions for this onboarding experience.
- Arrange a call with the colleague to discuss how you'll stay connected and start working out a pre-onboarding plan.
- Start gathering feedback and ideas from your diverse network on what will create a brilliant onboarding experience.
- Meet with your People Team colleagues to start planning for the onboarding experience

**10** WEEKS  
TO GO

- Share the pre-onboarding plan with your colleague that sets out how you'll be staying connected until they start.
- Start or check on the ordering of equipment and other items to ensure you get the basics right. Check on any adjustments required to support your colleague.
- Set up an electronic file or shared space to capture everything they'll need to be successful.
- Start identifying and collating the information, resources, relationships, insight, development and support they will need and use the file to bring this together easily for your colleague.
- Start scheduling time in people's diaries to ensure a great first few weeks.

**6** WEEKS  
TO GO

- If you are appointing a leader who will be responsible for people/teams then now is the time to sign them up for Boost. Boost is a leadership onboarding experience designed to accelerate your leaders to success. Contact me at [anwen@purpleskyconsulting.co.uk](mailto:anwen@purpleskyconsulting.co.uk) for more information.

## 4 WEEKS TO GO

- Check that all the equipment and practical items that you need for day one are ordered and will be ready on time.
- For your leaders who are signed up to Boost – they'll have their pre-onboarding session where they will start to plan the leadership learning and coaching sessions to support their first few weeks. You will also have a meeting to discuss how the programme will work.
- Check on how the pre-onboarding plan is going, is there anything else that your colleague needs at this time?
- Clarify where the colleague will be for their first day to ensure that all the basics they need for a great day 1 will be in the right place.

## 2 WEEKS TO GO

- Plan the office orientation and online orientation. Don't do this too early as things may change. Remember to ensure it is inclusive and that you don't make any assumptions about what they need from the work or online environment.
- Appoint the welcome buddy. If the colleagues are happy to be introduced before day 1 make that introduction.
- This is a good time to share the plan you have put together for your colleague's orientation – dazzle them with the thought and effort you've made to ensure they have a great start to their role.

## 1 WEEK TO GO

- Finalise the schedule for their first 2-4 weeks for introductions and meetings. Hopefully, their email and calendar are set up by now so putting these directly into the diary will make it even easier.
- Check on the file of information, resources, relationships, insights, development and support you were pulling together. Do you have everything ready?

## 2 DAYS BEFORE

- Give them a quick call to see how they are and if they need anything. It's a chance to update them on any changes to what you've already shared and to confirm those final arrangements for day 1. Remember to explain anything about access to the building or any tips you have on transport/parking.

## Hurray!! Day 1 has arrived.

I'm sure you'll be delighted that this day has arrived and hopefully your colleague is too!

Now it's time to put the planning into action.

### DAY 1

- Implement your day 1 plan and check in with them at the end of the day to see how they are and if they need anything.

### WEEK 1

- Check in daily, if this isn't already part of your plan. Understand what is going well and what else they need to help them.
- Start sharing your thoughts on the immediate goals to start giving them a focus for their first few weeks. This will help them settle and not become overwhelmed – as long as you are reasonable with the ask of course.

### WEEK 2

- Start giving feedback on what you are observing to help nudge them in the right direction and to build confidence.
- They are likely to be starting their Boost experience this week – this will give them a safe and non-judgmental space to explore how the first few days have gone and work out any immediate challenges they are facing.
- Continue to check in regularly, I'd recommend daily.

### WEEK 4

- Time for a review of the onboarding so far and to make any adjustments as required, capturing any further actions.
- Talk to them about their plans for the immediate goals and if they need any more information on clarifications.

### BEYOND MONTH 1

- The onboarding experience should not finish by month 1. You need to remember that it takes good people longer than that to get really comfortable so they are able to perform. You acknowledging them remaining in an onboarding phase throughout the first year will help to manage your expectations and support the colleague to succeed in the long term.



Talk to others about what would have been helpful for them when it comes to each section of the onboarding plan. What would have helped them integrate and feel successful more quickly?

Make sure you engage with views and ideas from a diverse group and share your proposed plan and ideas with your new or returning colleague.



### Consider how you share the plans

Talk about the best way for your colleague to receive the information. Do they want everything to work through themselves from week one or would it be better to take it in stages and work it through together?

This is about finding the right balance between dependency and overwhelm, generated by having too little or too much access to what they'll need to feel enabled and empowered from the start.

### Prepare for Day One magic!

You've invested the time and effort into a brilliant pre-onboarding experience; now it's time to make Day 1 a day to remember for the right reasons.

Think about:

- Are they going to be in the workplace – schedule to be there to greet them.
- Are they going to be working remotely – schedule to mirror this, if appropriate.
- Ensure the basics they need to get started are in place wherever they work.
- Agree on a start time with them, ensuring you will be the one they connect with first.
- If you are in a workplace together, consider making their workspace welcoming and memorable.
- If they are working remotely, consider arranging for a surprise to be delivered.

### Over to you

Use this guide and the preparation template to create an experience that will engage, enable and empower your colleague from before day 1. This is about making a great first impression in those early stages of your relationship, but it is also about laying solid foundations for their successful performance.

Creating a brilliant onboarding experience matters, and this guide will help you to up your game when it comes to your onboarding experiences. This will mean the brilliant people you are appointing or returning to work remember you and the experience you created for them, for the right reasons.

Get in touch if you need any help at [anwen@purpleskyconsulting.co.uk](mailto:anwen@purpleskyconsulting.co.uk)