

The New Joiner Experience:

# Skillfully Onboard New Team Members



“Sloppy onboarding turns into a sloppy culture.”

—Carley Guthrie, HealthCeramics

There's no better way to unintentionally say “We don't really care about you” than a minimal investment in onboarding new team members. **On the flip side, an awesome onboarding experience pays significant dividends to everyone involved.**

A lot of fast moving startups use this excuse: “Well, we're scrappy and moving so fast that we don't have a lot of time” Guthrie says. Words like “We need people that can hit the ground running abound in startups.” BUT wanting someone to be self-motivated and work to solve problems is different than spending the time to give people the context they need to succeed. Not taking the time for this sends the message that you can't be bothered, that you're not into the finer details, that you're about broad-strokes, and most dangerously, that they shouldn't trouble you to ask questions. What does this tell people about how to treat your company's product or users when they see a bug or something wrong?”

**“Onboarding is your chance to be who you said you were in the recruiting process.”** And excellent onboarding starts before day one.<sup>1</sup>

“If you accept the fact that people are too busy to give new employees a good experience, that attitude will perpetuate every time you bring someone new on,” she says.

Being too busy, regardless of size, is no excuse, Guthrie says. “You're not too busy. You just spent all this time, energy and money getting this new person to join. Blowing it is going to cost you even more when you have to start the hiring process again from scratch. **Don't make someone feel like you're too busy to make them feel good about choosing to work with your company.**”

Your goal should always be to make people believe on a gut level that your organization is so amazing that they couldn't possibly work anywhere else. Building that attitude starts immediately once an offer letter is signed. And if you do

it right, when the phone rings, and it's a recruiter on the end of the line offering the next big thing, they'll say, “Sorry, I'm happy where I am.”

<sup>1</sup> <https://firstround.com/review/our-6-must-reads-for-onboarding-tactics-that-help-new-hires-succeed-and-stay/>

## Set the Bar High

Onboarding is a tactical list of tasks and experiences that **gives newcomers what they need to get started**, acclimatize quickly and become productive contributors. When it is done well, individuals understand expectations, company culture, the various elements of their work and how things get done day-to-day. It's a celebration. Transitioning into a new company is rife with uncertainty for the new team member: "Did I make the right decision? Am I competent in this role? Am I seen as worthy? Do we like each other?" How will you know if you've delivered an awesome onboarding process? What is your organization's approach?

The approaches that most organizations take vary wildly, and so do the results. HBR lays out 4 different levels of onboarding.<sup>2</sup> Which best describes you?

	<p><b>0. Sink or swim:</b> Doing little more than making sure people have a desk and technology access. 5% of global companies fit here. Our experience is that about 20% of startups fall in this category.</p>
	<p><b>1. The Basics:</b> Sharing info about the company, the team, org structure, strategy, and business results. This is where most startups and 60+% of global companies land.</p>
	<p><b>2. Integration:</b> The startup organizes key meetings to transfer deeper knowledge. For a junior member this would be connecting not just with their team, but with other teams to see how their role fits in. For experienced hires this may include customers, suppliers, and/or the board as well as the leadership team.</p>
	<p><b>3. Contribution:</b> The company orchestrates events to bring on new people and/or organizes its structures to accelerate onboarding. It creates a place where new joiners can be their full selves, complete with gifts, flaws, and developmental areas.</p>

Most startups are at different stages in different areas of onboarding. You may be great at transferring knowledge of the role, but severely missing in helping new joiners navigate the nuance of the culture. A good example of a company that has many practices at level 3 is Menlo Innovations. They are a software consultancy who have a practice of pair coding. This practice means that a new hire gets exposure to people with deep knowledge very early on. This allows new hires to ramp up, but it also allows tenured people to onboard onto and off of projects with ease.

Traditionally at best we think of onboarding as *integration*, or level 2. How fast can we integrate the newbie into our team? How fast can we get this person to think and work like us? A more powerful approach is to ask, "**How fast can we create an environment for new team members to be fully contributing as themselves?**" When everyone is willing to fully be themselves— sharing fears, weaknesses and uncertainties— the whole team is free of unnecessary distractions. You create space for personal and team development faster. And those first few weeks set the foundation for how joiners settle into your culture, their roles and their long-term prospects at your company.

<sup>2</sup> <https://hbr.org/2017/05/onboarding-isnt-enough>

## The Pre-onboarding Phase

The onboarding experience with the first interaction a candidate has with your company.

- How engaging and thoughtful is the **job posting**? Where is it placed? Is it setup to draw from a diverse candidate pool?
- **When and how does someone who loves the mission of the company engage with a potential candidate?** Outside recruiters may be necessary to source the volume of candidates, but is there intentionality of connecting with someone, ideally someone senior who loves the mission of the company?
- **How is the interviewing process structured?** Does it take into account the applicant and the interviewer? Is the interview schedule flexible? Do you assume all candidates can do lots of pre-work before even talking to a person inside the company?
- **How prepared is the interviewer with thoughtful open questions** and real stories about the company? After all, this is a "matching process" with both sides considering if it is a fling or true love.
- **Plan interviews with a diverse group of people.** Assign people to different areas so a full 360 impression of the candidate can be painted. Someone should focus on technical skills, someone on interpersonal fit, and a third on [cultural contribution \(not culture fit\)](#). Meetings and conversations with candidates are a goldmine of information that can shape an awesome onboarding experience. Pay attention to what the person enjoys and values, and you can incorporate these passions into the onboarding process.
- **When you have locked in on the ideal candidate, leverage the time between the offer and getting the candidate's "yes!"** This time is fertile with opportunities for positive interactions. Send a welcome package to the joiner and their family. Have their new colleagues reach out by phone or schedule coffee. Write a personal note.

## Onboarding Essentials

Role Description	Onboarding Checklist
<ul style="list-style-type: none"> <li>● Most startups roles actually comprise 5-9 distinct responsibilities. Define what success looks like with responsibility descriptions for each.</li> <li>● Use early conversations to edit the responsibilities together to ensure alignment</li> </ul>	<ul style="list-style-type: none"> <li>● Create a universal onboarding list that is used for all new joiners.</li> <li>● Each new joiner edits and updates the checklist to make it better for the next person as well as adds anything that is unique to their role.</li> <li>● Include steps for each of the Education, Observation, Activation and Demonstration (see example below).</li> </ul>
New Joiner Buddies/Sponsor	Relevant Learning
<ul style="list-style-type: none"> <li>● Although the new joiner is responsible for their own success, buddies or sponsors are responsible for the new joiners engagement.</li> <li>● There are 3 different roles to be filled - leader buddy, role buddy and culture buddy. Make sure each is filled, even if it's by 1 person.</li> </ul>	<ul style="list-style-type: none"> <li>● Role appropriate information</li> <li>● Top initiatives and why</li> <li>● Top clients and why</li> <li>● Industry knowledge</li> <li>● Organizational history</li> <li>● Who to go to for....?</li> <li>● Company values, "how to be"</li> </ul>
Critical Conversations	Key Relationships
<ul style="list-style-type: none"> <li>● In the first week schedule a meeting to align expectations for the next 90 days.</li> <li>● Review at 4-6 weeks and again at 90 days</li> <li>● Make specific time for hearing how things are going from the new joiner's perspective. Make this time separate from when you're offering feedback and ideas about how the new hire is integrating.</li> </ul>	<ul style="list-style-type: none"> <li>● Who is important to connect to quickly?</li> <li>● How do those people like to connect?</li> <li>● Who can help seed relationships. This can be a great place to leverage the culture buddy.</li> </ul>

## Who owns the onboarding process?

We advocate having the joiner take charge of the process with the support of buddies. No one cares more about the joiner's onboarding than they do. If you have a checklist, hand it to them on day one and explain that the ultimate responsibility to complete it falls to them. The buddy acts as an accountability partner and can raise a red flag if the process starts slipping. For example, the 'who to go for for x' may be outdated or not even exist. The new joiner should fill it in and update it for the next person.

And if you're reading this as a new joiner, you can still use all the information in here. You'll need to find your own path to gather this information in order to be successful.

### Example of Education, Observation, Activation and Demonstration:

Sales Example

<b>Education</b> What needs to be learned?	Learn products/services, see sales presentations, ask lots of questions.
<b>Observation</b> Who should the joiner observe doing a great job?	Shadow one or more peers in prospect meetings.
<b>Activation</b> What does the joiner need to do, experience or complete to build competence & confidence?	Complete several role plays, accept suggestions for improvement.
<b>Demonstration</b> What does the team need to build trust in the joiner's capabilities?	Lead the sale with a mentor, move forward alone when comfortable.

