Improving the Onboarding Process

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About the Author

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Many service desk professionals may not feel the need to concern themselves with onboarding, as it is traditionally a Human Resources process. However, the onboarding process involves a multitude of departments, and is therefore an important process for service desk managers to understand. The SDI global best practice Service Desk Standard defines the onboarding process as part of the People Management concept:

There is a structured on-boarding process to ensure that new staff feel valued and part of the business, understand company culture and become efficient and effective as soon as possible.

* There is a basic induction or onboarding process in place.

** Specific onboarding metrics are defined that incorporate training, culture and compliance. Timescale milestones are identified. Regular formal reviews are conducted to assess progress against required outcomes.

*** The onboarding process includes specific metrics, tracked at multiple points in time that inform recruitment decisions. The process is documented and regularly reviewed and updated.

**** The onboarding experience is integrated with recruitment and is customised for the service desk. It teaches organisational culture and strategy, supports interpersonal network development and provides early career support and job readiness skills.

The cost of onboarding new employees of IT service management can be measured in both the time and resources it takes to bring new staff up to speed. It is not unreasonable to predict that an unsatisfactory process can contribute to a higher rate of staff turnover. Therefore, in order to maximize value, service desk managers must consider several factors when it comes to the onboarding process.
What to avoid

Unclear Expectations
The key thing to try to prevent for new employees is confusion, as this may cause them to spend unnecessary time and energy being unsure about what they are meant to be doing. They may also disrupt other employees with questions that could be easily answered with the right onboarding material, such as an FAQ written by the hiring manager, or a self-help portal. Furthermore, to avoid confusion, it is necessary to make sure new employees are completely clear from the beginning what their manager’s goals and expectations for the new starter are. Using something such as Objective and Key Results (OKRs) framework to set goals is an easy and effective way to create that clarity. Moreover, this will empower them to work on their own initiative and could improve the onboarding experience.

A Hurried Onboarding Process
This is perhaps the most common error made with employee onboarding. Typically, service desk managers want their new employees to be able to start working as quickly as possible, so they may not invest the right amount of time in developing their knowledge or skills. It is necessary to do this as a service desk analyst who has not had a full onboarding process may be lacking certain areas of knowledge, be it industry or process related, or skills, such as dealing with frustrated customers, and will not perform to their full ability. Investing time and resources into the onboarding process can allow new starters to become more productive in the long term.

Having a Flawed Process
Onboarding is what sets an organisation up for long term success, and it is therefore important to ensure processes are in place. A good onboarding process will have several aspects. Firstly, a checklist will ensure that all criteria of the process are met. A plan should detail each procedure, and give anyone involved in the onboarding process a good basis to understand how to best undertake their part. There should also be a set of goals for the new starter, in order to give them some guidance on what they should be achieving in the early days. This can include any training or development goals, which new starters should be provided with. Lastly, a basic onboarding process should include regular check-ins by the hiring manager. This will allow both manager and employee to assess how the new starter is settling in, and any ways in which the employee requires assistance or guidance.

Having a process will make onboarding more efficient as well a better experience for both employee and employer. An easy way to create a process is to work with multiple members of your team to create a formal process that is inspired by actual employee needs and ideas. Conversely, having too rigorous of a process can also be detrimental to the onboarding experience. It is important to make sure each employee is welcomed to the team and trained the way that best suits them. Each employee is unique and will settle into their role at different paces, and so it is important to adjust your process depending on their preference. Some employees will require more feedback, and others will want to learn about their role in a different way, so it may be necessary to adjust the process accordingly. Personalising the onboarding process can allow for a better experience for the employee, and help ensure that they are more confident in their role on the service desk, leading to better morale and motivation from the outset.

Not Collecting Feedback
It is important to collect feedback about your onboarding process in order to gauge its effectiveness. Failing to do so can lead to a flawed process and unhappy employees. It is imperative to make sure that employees are actually getting value out of the programme, so that the onboarding process can become more effective for future new starters. Using onboarding surveys is a great way to get consistent feedback on the process and organise it in an easy way. An onboarding survey should ask how new starters what they thought was most effective, as well as how the process could be improved. The survey could include questions such as:

• How have you found your onboarding experience?
• Do you feel like you are being supported in your new role by your manager/team leader?
• So far, what part of the onboarding process has been the most effective/beneficial?
• Do you have any tips on how we can improve the onboarding experience?
How to conduct a successful onboarding process

Do Not Rush the Process
This is by far and away the most important tip for employee onboarding. The process should take a minimum of three months to complete, but it is not uncommon for organisations to give their employees no more than a week. Most of the time, hiring managers want their new starters to start working as quickly as possible. However, an inadequate onboarding process runs the risk of underdeveloped employees, who may not be able to reach their full potential. Alongside learning the job, there is a significant amount of other things a new starter must learn, such as understanding the business and their role within it, company culture, product and service, how the team works, the tools to use, and so on. With onboarding, patience, communication, and support is key. The more time and resources given to new starters to allow them to settle in and become comfortable and knowledgeable about their role, the faster they will reach full productivity after the fact.

Establish Clear Goals
While it is important to take time and be patient with new employees, one way to get them up to speed faster is by establishing clear goals for their first three months, and checking in on them frequently to ensure that they are working towards achieving those goals and are sure of how to do this. Setting goals early on is a good way to keep them working on what is important.

Buddy Training
Mentorship or Buddy programmes are beneficial in many ways for a new starter. New employees might understandably be nervous, confused, and overwhelmed. Providing new employees with a mentor is an effective way to ensure they have someone to help them through the first few months while they are still finding their feet. They may feel like asking someone a question is too distracting, however, it can be beneficial to know they have a dedicated person they can go to directly. This also gives the new starter an opportunity to bond with another member of the team, which can help them settle in faster or more easily.
Streamlining the departments involved

On average, 5 separate departments are involved in an employee’s first day. Being prepared for this sets a good impression of the company, and can empower an employee to hit the ground running. As we have established, making a new employee’s first day as simple and streamlined as possible, for example, in terms of administration, can allow them to start learning the job sooner.

A fragmented onboarding process can also have a negative impact on hiring managers. Onboarding may be seen as a straightforward process, but it can be incredibly complex and time-consuming. Hiring managers need to coordinate and drive onboarding activities, working with facilities, finance, HR, IT, and other teams for varying aspects of the onboarding process. However, because the onboarding process is manual and largely unstructured, activities inevitably get delayed or overlooked. Uniting departments and streamlining processes for the onboarding has the potential to greatly improve the onboarding experience by eliminating inefficient, error-prone manual processes that rely on a multitude of separate applications or technologies.

Automating the onboarding process

There are certain aspects of the onboarding process which can become repetitive and time consuming, such as account creation, setting up payroll, and supplying appropriate hardware. By automating employee onboarding, organisations can reduce the workload of hiring managers and create a welcoming experience for new employees. With some service management tool capabilities, a hiring manager simply needs to access a self-service portal, select what onboarding steps are necessary for the new starter, and send off a series of requests. The capability will then automatically distribute each activity to the right team, be it HR, IT, facilities, or another department. It may also be able to track the status of each activity and prompt team members when if they are not taking appropriate action. Many capabilities can even completely automate repetitive tasks, such as creating employee accounts or updating payroll systems.

This signifies that hiring managers do not need to personally engage with multiple departments and spend a significant amount of time chasing to ensure all procedures are being performed. Instead, they are able to monitor the progress of all onboarding tasks through an intuitive dashboard, which can give them more control over how their new employee will experience their first day. Automating the onboarding process can also relieve some of the concerns a hiring manager may have, for example, the new starter not having the correct system access, or having hardware set up that fails to support them in their role.

Something as simple as a self-help FAQs about policies, procedures, payroll, and other HR topics can prevent a new starter becoming frustrated and can allow them to be self-sufficient without relying on other employees or their manager. It can also empower them to enable them to learn things that may have otherwise been forgotten. Giving new starters access to a self-help capability could also signify that they work more efficiently, as they have access to a wealth of knowledge which they can search as and when necessary, rather than wait for an answer from a colleague.

The main benefits of this technology are the increased efficiency in the onboarding process, and the reduced amount of time that the hiring manager needs to spend ensuring everything is in place. This allows the manager to resume their typical day to day tasks, or perhaps spend
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a bit more time ensuring that other things will be in place for the new starter’s first day, such as setting up their work station with stationery or little welcome gifts. Clearly, onboarding is not a process to be taken lightly. Having an effective process, inspired by employees, can set the tone for the new starter and allow them to make the most of their first day. Condensing the process or not setting clear objectives or goals for new starters can lead to lower staff retention and unhappy employees, therefore taking a better structured approach to onboarding could prevent this.

Empowering employees with self-service and automating the repetitive tasks can significantly improve the employee experience and lead to increases in productivity. Coupling this with streamlining the different teams involved in the onboarding process, service desk managers can spend less time on ensuring that multiple steps in the process are being worked on, and more time focusing on the new starters themselves.
About SDI

The SDI company mission is to inspire service desks to be brilliant. To achieve this mission SDI has developed a set of goals by which it aims to inspire service desks to:

**Embrace:** To raise the quality of service delivery by valuing best practice

**Engage:** To create an inspiring and engaging customer experience

**Invest:** To empower their teams to be inspired, take action and be better

**Shine:** To demonstrate and deliver exceptional business value

SDI sets the globally recognised best practice service desk standards that provide clear and measurable benchmarks for service desk operations and professionals. The standards are designed to encourage service desks to embrace and value best practice in order to raise the quality of service delivery.

For more information about SDI please visit [www.servicedeskstitute.com](http://www.servicedeskstitute.com)

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