Overhauling Recruitment

Onboarding Toolkit

Target audience: Deputy HRD/AD/Heads of resourcing

About this toolkit

The Overhauling Recruitment Programme is seeking to change the way that the NHS attracts, selects and onboards people into the service.

This toolkit looks at onboarding to develop and embed good recruitment practice, and help retain newly recruited staff.

This pack is designed to support Deputy HR Directors, Heads of Resourcing and their teams in NHS provider organisations and systems to review, develop and implement effective approaches and policies relating to preboarding and onboarding of newly recruited staff in order to:

- Improve staff retention rates

- Relieve pressure on operational and recruitment teams constantly recruiting to stand still

- Maximise positive candidate experience

- Guard against bias and encourage fairness and diversity

This is one of several tools, part of the overhauling recruitment series.
Model documents, case studies and other helpful resources can be found on FutureNHS.

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The Onboarding process

NHS England

Onboarding, or inducting new starters can help organisations address several problems related to employee turnover, productivity, engagement, compliance, and employer brand. By investing in effective onboarding programs, organisations can set their new employees up for success and improve overall employee retention and satisfaction.

	Why do we need an onboarding process?
1	**Reducing turnover:** One of the main problems that organisations face is high turnover rates, which can be costly and disruptive. Effective onboarding can help reduce turnover by providing new employees with the tools and resources they need to succeed in their roles.
2	**Improving productivity**: New employees may take some time to get up to speed with their job responsibilities. Effective onboarding can help speed up the process and provide new employees with clear job expectations and training on policies and procedures, aiding quicker productivity.
3	**Enhancing employee engagement**: Onboarding can help new employees feel valued and welcomed, which can lead to higher levels of employee engagement. Engaged employees are more likely to be satisfied with their jobs, perform better, and stay with the organisation longer.
4	**Ensuring compliance:** organisations have legal and ethical responsibilities to comply with laws and regulations related to employment. Effective onboarding can help ensure that new employees understand their obligations and responsibilities related to compliance.
5	**Building a positive employer brand:** Providing a positive onboarding experience can help organisations build a positive employer brand. New employees who feel supported and valued are more likely to share their positive experiences with others, which can help attract top talent to the organisation.

Onboarding means different things to different people and services:

- Introduction to organisational culture and values
- Introduction to the wider team
- Job-specific training
- Benefits and policy
- Organisation wide training
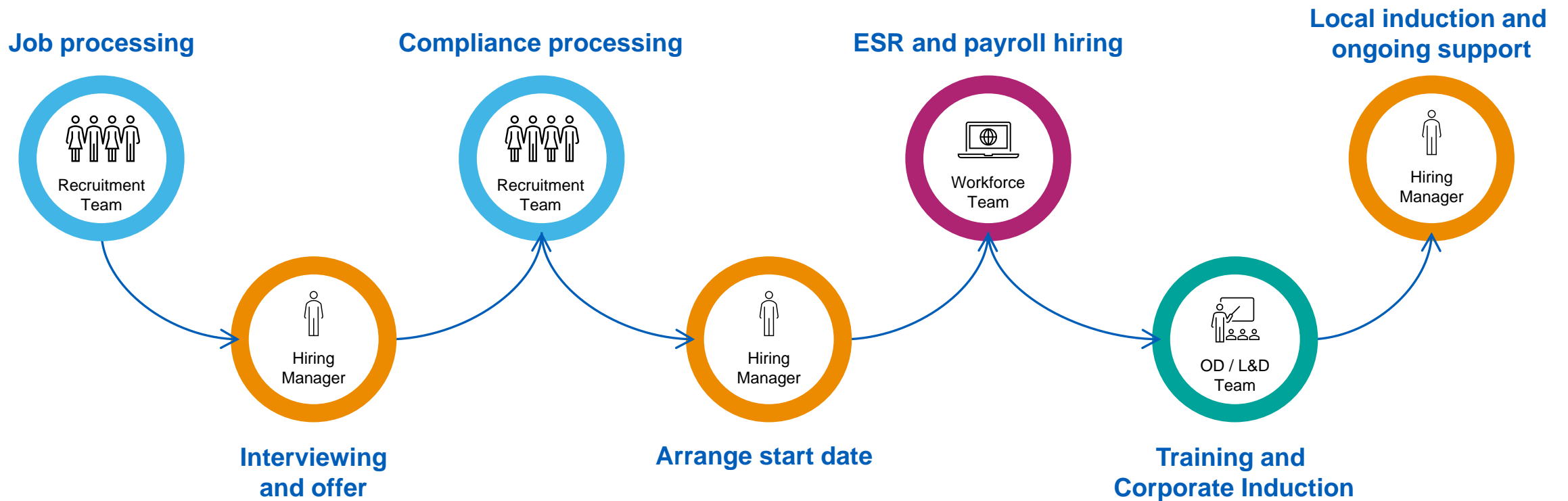- Performance expectations
- Ongoing support and development

"Recruitment and onboarding has become very transactional rather than an experienced thought process. We would like to use onboarding as a way to welcome people rather than using it to tick off processes.

These are identikit to other organisations. It is a dry and uninspiring process and should be an invigorating and exciting process."

Feedback from a trust on the Overhauling Recruitment Programme

A Typical Onboarding Process

Onboarding is a structured process that necessarily includes practical elements such as pre-employment checks, however, the focus at every stage is a human one, to support new employees to feel welcomed, informed, and prepared for success in their new roles. A typical onboarding process is show below:

Job processing

Recruitment Team

Interviewing and offer

Hiring Manager

Compliance processing

Recruitment Team

Arrange start date

Hiring Manager

ESR and payroll hiring

Workforce Team

Training and Corporate Induction

OD / L&D Team

**Local induction and ongoing support**

Hiring Manager

The nature of how our services and systems interact with each other creates multiple handoffs through a process potentially resulting in many requests, interactions and occasionally, human errors.

Key stages of Onboarding

NHS England

Overall, the recruiting manager is a critical link between the organisation and the new employee. They play a key role in identifying, selecting, engaging and onboarding new employees. They are also largely responsible for ensuring that new team members are well-prepared to succeed in their new roles.

## Onboarding is a collaboration of efforts

Not a one time event → Shared responsibility → Success is dependant on collaboration
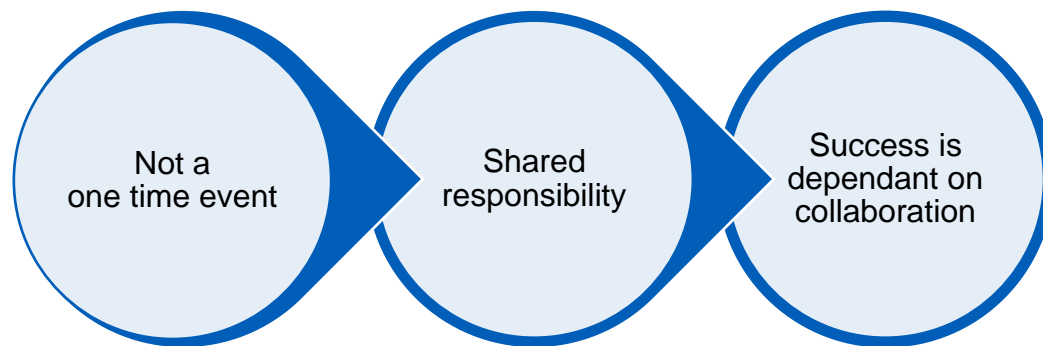
A poor onboarding experience risks:

- Increased turnover
- Damage to employer brand
- Reduced productivity
- Potential legal action

Key stages

- Pre-hire

Recruitment

Pre-Boarding

Orientation

Training

Integration

Evaluation

Hiring manager
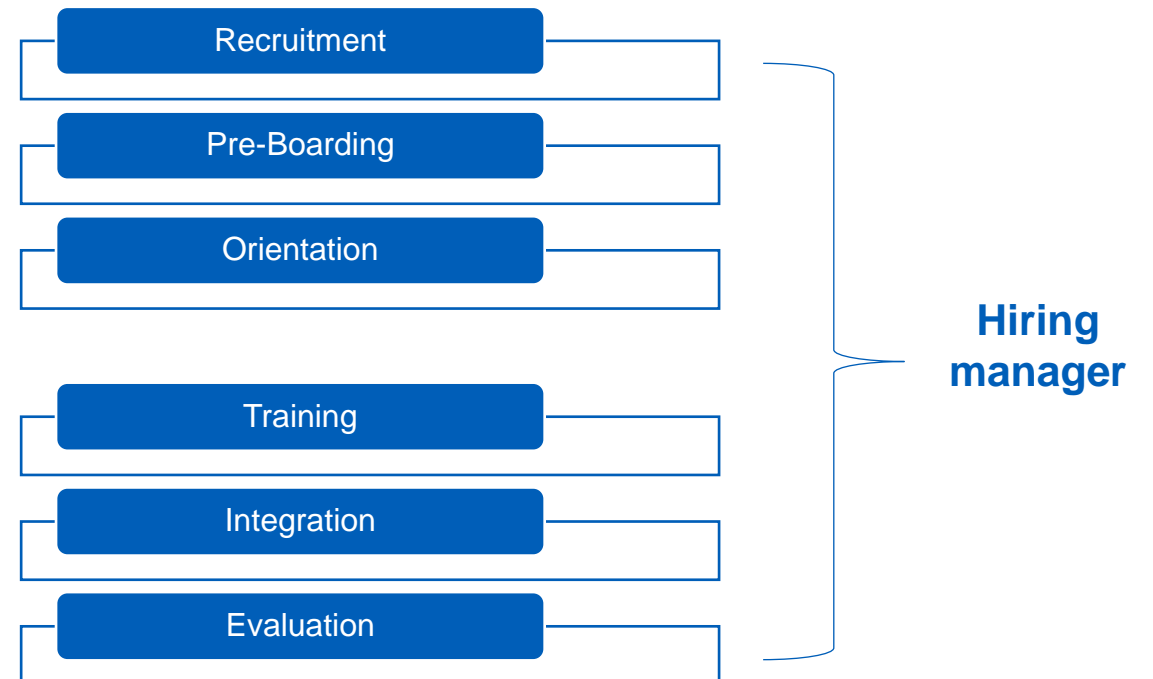
What are the elements of a great onboarding experience? *1 of 2*

The ideal candidate onboarding experience is a seamless and effective process that helps new employees feel welcomed, prepared, and excited to start their new job

Here are some key elements to a great onboarding experience:

Clear communication

The onboarding process should be clearly communicated to the new employee, including information at each stage of the hiring process.

- **Pre- boarding (recruitment checks)**
- **Onboarding (starting)**
- **Aboard (new starter)**

The candidate has bought into the recruiting manager, and whilst recruitment may manage processes it is integral to a great experience to have the hiring manager supporting and communication with their new hire.

Candidate should know what to expect, when to arrive, what to bring, where to park, about cycle to work schemes and local public transport, and who to contact if they have questions.

Assigned a mentor or buddy

A mentor or buddy should be assigned to the new employee to provide guidance and support during the onboarding process and beyond.

- They can help ensure the person is introduced to the team as well as to the organisation's values and culture
- Direct them as to resources, user guides and policy etc.

Here are some key elements to a great onboarding experience:

Feedback

Regular feedback should be provided to the new employee to ensure they are meeting performance expectations and to address any areas for improvement.

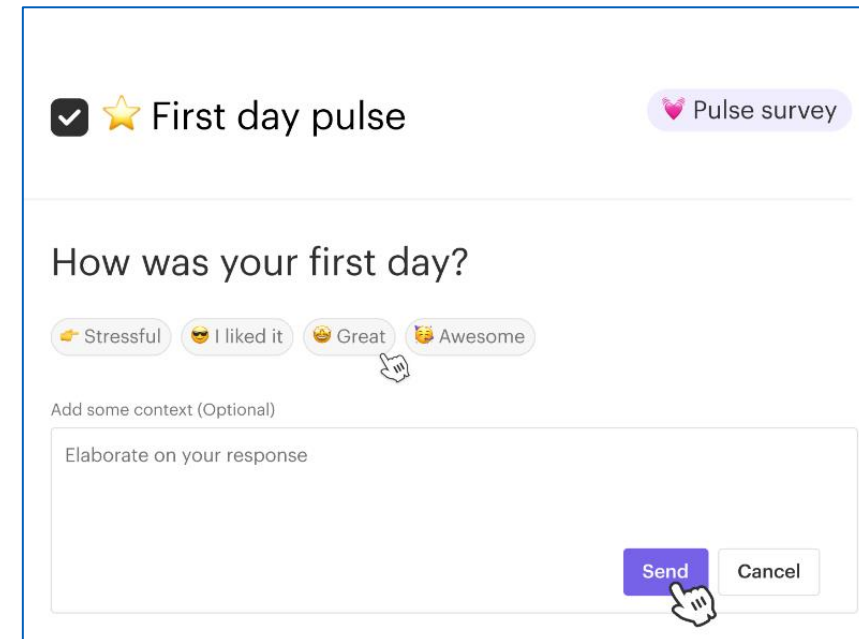**Formal and Informal Meetings**

The new employee should have the opportunity to meet with key staff, such as their manager, team members, and colleagues from other departments, to gain a better understanding of their role and how they fit into the organisation.

Open-door Policy

The new employee should feel comfortable asking questions and raising concerns with their manager or HR representative

Pulse surveys

Check, check and check again to ensure there are no surprises for the candidate. Review all feedback and then return 3 months later to check on what has been actioned and to show you care and are listening to what is important an makes the candidate feel valued.

Measurement of Success

NHS England

Overall, measuring the success of onboarding programmes is critical for organisations to ensure that they are providing a positive experience for new employees, achieving their intended outcomes, and driving long-term success. By baselining and tracking success metrics, organisations can evaluate the effectiveness of their onboarding programs and make data-driven decisions to optimise the onboarding process.

To baseline and track onboarding metrics, organisations can use various tools, such as surveys, performance evaluations, and analytics software. They can also set targets and benchmarks for each metric to track progress and identify areas for improvement.

- **Time to recruitment:** A standard recruitment metric that can indicate success, or otherwise, with your overall recruitment process.

- **Retention rates:** This metric measures the percentage of new employees who remain with the organisation for a certain period of time (e.g., 6 months, 1 year). High retention rates indicate that new employees are satisfied with their roles and the organisation and are more likely to stay with the organisation long-term.

- **Employee engagement:** This metric measures how engaged and motivated new employees are in their roles and the organisation. It can be measured through surveys, polls, or other feedback mechanisms that capture employees' attitudes, perceptions, and satisfaction with the employment process as well as their induction, work and the organisation.

- **Cost savings:** This metric measures the cost savings associated with effective onboarding. It can be measured by comparing the costs of recruiting and training new employees to the costs of retaining existing employees.

- **The "Good Hire Index" percentage figure:** Tracked over a period of time, this is a measure to show the trend for retaining new staff beyond the first three months. It can be used as a proxy measure of the success of the Onboarding Programme. The calculation is shown below:

Good Hire Index Percentage

$$\frac{\text{Total number of leavers (non-medical) with service of 90 days or less between 1st January and 31 December}}{\text{Total number of starters (non-medical) between 1st October and 30 September}} \times 100$$

Note: The calculation should be expressed in Headcount figures rather than WTE.

Equality and Diversity Considerations

NHS England

Overall, creating an inclusive and diverse onboarding process will not only help new employees feel welcomed, but also create a positive workplace culture where all employees feel valued and supported. When considering equality and diversity during onboarding, it's essential to ensure that everyone is treated fairly and with respect, regardless of their race, gender, age, religion, disability, or sexual orientation. Here are some key issues to consider:

Inclusive language: The language used during onboarding should be inclusive and not discriminate against any individual or group. Avoid using gendered or discriminatory language and make sure that all employees feel welcomed and valued.

Accessibility: Ensure that the onboarding process is accessible to everyone, including people with disabilities. Consider their needs, such as providing alternative versions, captioning, interpreters, or any necessary equipment or technology to help them participate fully in the onboarding process.

Diversity and inclusion training: Provide diversity and inclusion training to all employees, including new starters, to raise awareness about the importance of equality and diversity and promote a more inclusive workplace culture.

Cultural sensitivity: Show sensitivity to different cultures and beliefs, especially in a global or multinational organisation. Ensure that new starters understand the organisation's values and policies regarding diversity and inclusion.

Commissioned by the NHS and published in 2014, the "No More Tick Boxes" report is a review of the experiences of black and minority ethnic (BAME) staff working in the NHS in England. The report identified a range of issues and also highlighted the need for more inclusive recruitment and promotion processes.
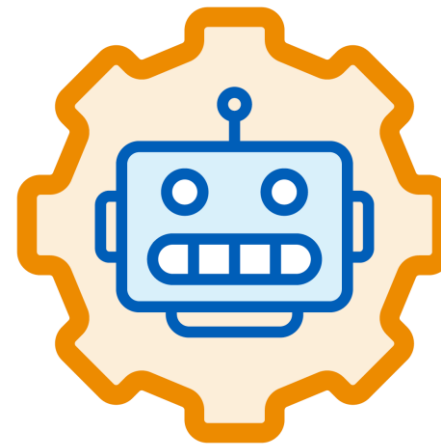
The report made several recommendations including content dedicated to onboarding. The key lessons are:

- **An inclusive team environment lessens turnover and increases team effectiveness**
- **"Outsiders" should be welcomed**, their difference valued, and their presence and expertise valued to create high-performing teams
- There should be **open discussion about welcoming difference** and what extra the new staff member brings. This is especially true where staff are overseas trained or employed where additional mentoring and other support may be essential
- **Progress after onboarding should be followed up and feedback acted upon to** lesson any potentially negative impact.

How can AI or software help the experience? *1 of 2*

AI or software can play a significant role in improving the onboarding experience for new employees. It may seem counter intuitive, but AI technology can be great for capturing 'warm and fuzzy' interactions with team members and creating memorable touch points for staff and recruiting managers alike. Many large scale private and public sector organisations use software to enable better communications and experiences throughout all their processes. This helps perpetuate positive brand association and loyalty for like-minded individuals.

- **AI-powered software can automate** not only the preboarding process, but it can help the recruiting managers too. It can help automate tasks like sending out welcome emails, collecting new starter information, and providing access to company systems and tools and can create a positive interaction with the recruiting manager prior to starting.

- **Personalisation:** AI can be used to create a personalised onboarding experiences for each new employee. Based on their role, experience, and job requirements. AI-powered software can provide customised training modules and resources that cater to their specific needs.

  Organisations with early recruiting manager engagement report a much more positive experience for new starters. Managers remembering staff birthdays and key events for staff can have a real positive impact.

- **Chatbots:** Chatbots can be used to provide immediate assistance and answers to common questions that new hires may have during the onboarding process. This can help reduce the workload for HR staff and managers and ensure new hires receive quick and accurate responses.

- **Virtual Reality:** VR technology can be used to provide new employees with a virtual tour of the company's facilities, helping them familiarise themselves with their new work environment and colleagues.

- **Data Analytics:** AI-powered data analytics can help track the effectiveness of the onboarding program and identify areas for improvement. For example, it can help track the completion rates of onboarding tasks and assess new starter retention rates.

Challenges

NHS England
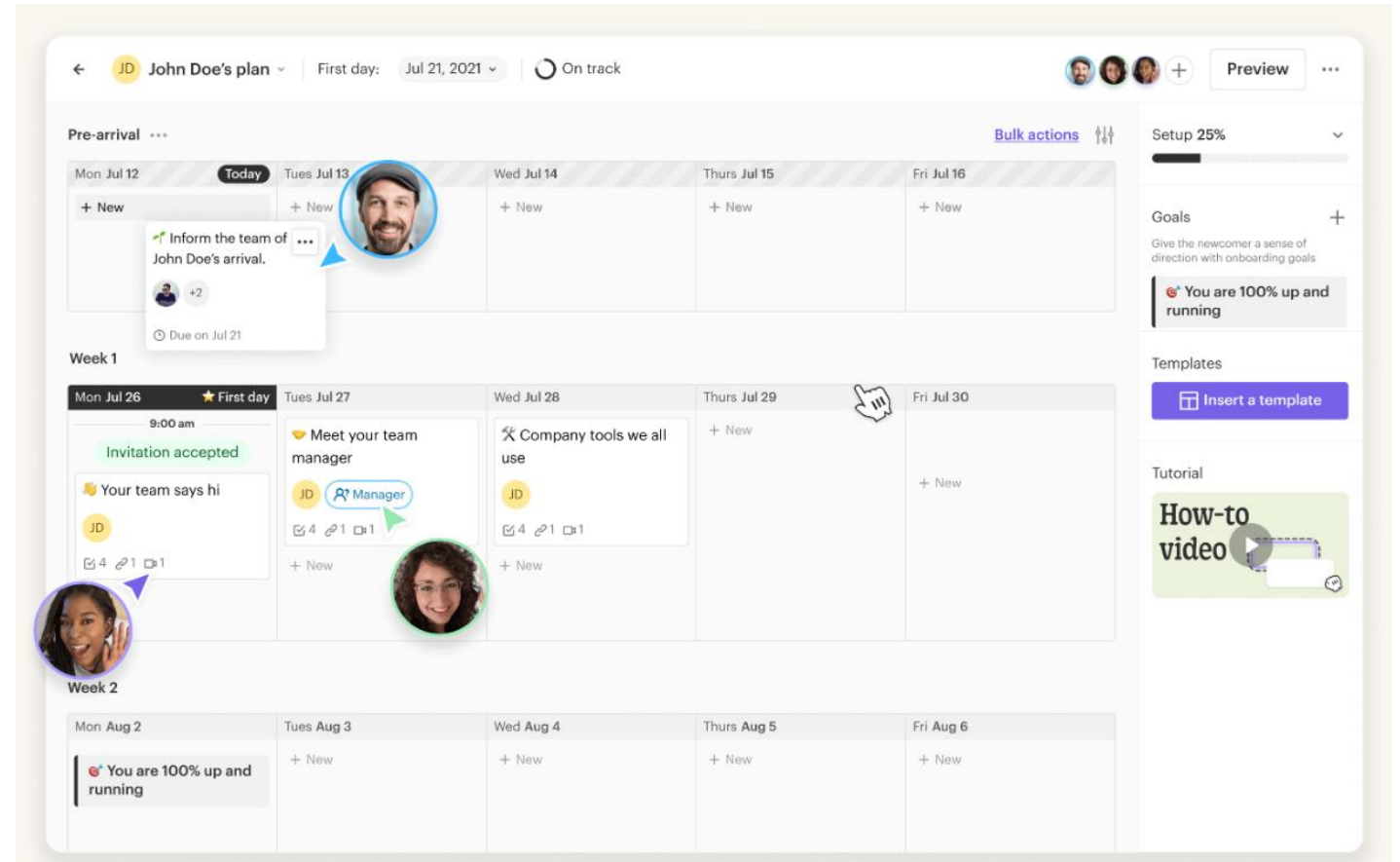
Onboarding new staff can present a range of challenges due to the complex nature of organisations and the healthcare sector. It can be a challenging and complex process. To address these challenges, it is important to have clear policies and procedures in place, effective communication and collaboration between stakeholders, and a robust IT infrastructure to support the process.

	What onboarding challenges do organisations face?
1	**Volume of new starters:** The NHS is a group of large and complex organisations, with a high volume of new staff starting across different departments, specialties, and locations. This can create logistical challenges for recruiting teams, who may struggle to manage the volume of applications and appointments.
2	**Capacity of recruiting teams:** Recruiting teams within the NHS may have limited capacity, resources, and expertise to effectively manage the recruitment and onboarding process for new staff. This can result in delays, errors, and inefficiencies in the process, which can impact the quality of patient care.
3	**Hand-offs to other teams:** The onboarding process for new staff in the NHS often involves multiple teams and stakeholders, such as HR, IT, and clinical teams. Handing off responsibilities between teams can lead to miscommunications, delays, and inconsistencies in the process.
4	**Multiple stakeholder involvement:** As mentioned above, onboarding new staff in the NHS involves multiple stakeholders, each with their own priorities and requirements. This can create a complex web of dependencies and interdependencies, which can make it difficult to align everyone around a common goal.
5	**Varying capacity and influence:** Different stakeholders within the NHS may have varying levels of capacity and influence over the onboarding process. For example, clinical teams may have more say in the onboarding process for certain roles, while IT teams may have more influence over the technology and systems used.
6	**Cost and integration of IT systems:** The NHS relies heavily on IT systems to manage patient data, appointments, and communications. Integrating new staff into these systems can be costly and time-consuming and may require significant investment in training and infrastructure.

Despite the challenges… Onboarding is an essential part of integration and belonging that links all parts of the hiring process and ultimately aids retention.

Thank you for taking the time to view this pack.

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