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## A Simple Employee Onboarding Guide for SME's

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HR ENTRIES  
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### Introduction

In HR parlance, employee onboarding is defined as the process of familiarizing a new employee with the organization. Onboarding begins from the moment an offer is made to the employee until the time the employee becomes a productive member of the organization.

On web research, you will find several articles on this topic and most of them are quite exhaustive and impractical. Several of them suggesting that the onboarding process extends for months. But for most SME's this is impractical.

At the same time in multiple onboarding research studies, we find the below two important conclusions

- Hiring is not only time-consuming, but it is also an expensive affair.
- Retaining employees depends on how these difficult-to-find employees are onboarded. If they are not onboarded optimally, you may lose them, and that will result in another expensive hiring cycle.

In this guide we focus on simple, practical and straight forward steps for SME's to create an effective onboarding process/checklist. It should involve creating an environment in which the employee is made comfortable enough to interact freely with their colleagues and establish social relationships in the workplace.

Specifically, it involves getting the employee to complete the necessary paperwork for statutory compliance and equipping them with all the tools they need to do their job well. During onboarding, employees learn what the organization expects from them in terms of skills, communication style, and attitude.

### Step by Step onboarding guide

When a prospective employee accepts an offer letter, they officially become a part of the organization. The following steps are what make up the onboarding process smooth and effective.

First and foremost, the HR should prepare an onboarding policy and create a checklist of onboarding activities. It should be a comprehensive one to include all stakeholders like facilities, IT infrastructure, security, reporting manager & teams, and most importantly the HR executive who was involved during the recruitment.



Step 1 : Generally there is significant time between the acceptance of the offer and date of joining.

Make productive use of this time and have regular contact with the prospective employee. Create and capture the basic information of the employee in your system. Share and circulate the joining formality details with the candidate and allow them to share all the relevant information/documents pertaining to education, employment history so that you can finish the background verification process well before the joining date. Please find below sample list of documents to be collected.

Task Name
<b>Candidate File Creation</b>
Resume
Offer Letter
Offer Acceptance Copy
Bank forms (If needed)
Insurance forms
<b>Personal info</b>
Name, Family details
Identity Proof (Aadhar, Passport, Etc)
Candidate ID Creation
Collect Mandatory Docs from Candidate
<b>Educational Documents</b>
10th Marks card
12th Marks card
Degree Marks Card
Degree certificate
Masters certificate
Any other educational certificate
<b>Employment History</b>
Company 1 Employment Certificate
Company 2 Employment Certificate
Latest Relieving Letter
Payslips of 3 months
PF/UAN No
Bank A/c No



Step 2 Allocate tasks to all relevant stakeholders and track them for completion. If you do not have a software to do this, create a excel sheet for the same. (Download our excel template)

Step 2.1 Inform the Facilities & Security team of the new employee joining date.

They should create employee ID so that the new employee is not made to wait at the security gate for lack of information to the security and ID on the 1<sup>st</sup> day. The facilities team should allot a workplace, telephone and necessary stationary for the employee. Please find below sample list of action items for facilities team.

<b>Facilities and Infrastructure</b>
Inform Security and Create ID/Access card
Allot work space
Allot Telephone
Basic Stationery Kit

Step 3 Inform the IT team to create employee email id, access to employee self-service and tools needed to perform his role. Please find below sample list of action items for IT team.

<b>IT Team</b>
Allot Desktop/Laptop
Create email ID
Provide access to selfservice portal
Install all necessary software

Step 4 Inform the payroll processing team to include the new employee to the payroll list, sync PF, create gratuity account, initiate health insurance and another benefits and perks.

<b>Payroll</b>
Create payroll
Sync PF
Create Gratuity Account
Enroll for Health Insurance
Enroll for any other benefits/perks



**Step 5** The reporting manager and the team should be roped in to familiarize the new employee with the team. Setup a one on one meeting with the reporting manager and also host a small welcome party with the team to break the ice.

<b>Day 1 - Introduction to Hiring Team and Manager</b>
Day 1 Meeting with hiring manager
Team introductions
Welcome party Arrangements

**Step 6** Step up Induction or Initial training to educate the new employee on the organizational policies and also to equip him/her for executing the new role.

<b>Induction Training</b>
Setup dates
Inform Trainers

**Step 7** Work with the reporting the manager to setup the first month KRA and expectations from the candidate. Communicate & clarify the same to the employee. Track and provide all the necessary support to achieve so that the new employee gains confidence and is motivated for the long run.

<b>Month 1 - Expectations and Deliverables Clarification</b>
Work with hiring manager to setup 1st month KRA's
Communicate and clarify to candidate
Review and confirm and at the end of 1st Month

**Step 8** Last but no the least, collect feedback from the new employee about the onboarding process and continuously improve.

### Conclusion

If this is the process to be followed for one employee, imagine if there are multiple employees joining every day at different locations and teams, the complexity increases exponentially and HR will not be able to manage and track this important process which might result in significant frustration to employees and others involved in the process.

Ideally automation of this whole process helps significantly in streamlining and creating a significant impact on the new employee. The digital onboarding system can be used to manage profiles of the candidates prior joining, allow submission of documents digitally, create & allocate tasks and track



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completion. If organizations can automate most of these tasks then it can focus on making that 1<sup>st</sup> day of the employee exciting and productive.

hrEntries provides a modular application that automates the entire digital onboarding and exit process. It helps HR to define onboarding/exit policies, enables candidates to complete onboarding activities and submit related documents online, allows HR to create a checklist and track activities, seamless conversion of candidates to employees and digital tracking and approval of exiting processes.

For more information, Demo, or free trial, please reach out to us at [info@hrentries.com](mailto:info@hrentries.com)