

VIRTUAL ONBOARDING REPORT

POLYMENSA

TAILOR-MADE LEARNING & DEVELOPMENT
FOR AGENCIES

RESEARCH BACKGROUND

In 2020 our sector was forced to shift to a remote working model. For most agencies hiring new starters in a virtual environment was a first.

This research will reveal experiences from companies we carefully selected. Those that demonstrated the best virtual onboarding experiences, validated by exceptional feedback from their new starters.

The goal:

To ensure your new starters are fully immersed in your culture, despite working from home and are as productive as quick as possible.

RESEARCH BASE

41 companies

33 agencies and **8** SAAS businesses

36 UK based and **5** US based

40 – 350 staff (range of company sizes)

0.5 – 1 hr qualitative interviews...

...with people ops / HR directors and founders

**THANK YOU TO ALL
PEOPLE WHO TOOK PART
IN THIS RESEARCH AND
THOSE THAT HELPED
REVIEW THE REPORT!**

EXECUTIVE SUMMARY

KEY PHASES OF ONBOARDING

In all companies there were minor variations of these key four phases:

1. Pre-boarding (begins typically after employee contract is signed)
2. 1st day
3. 1st-2nd week
4. The next 30-60-90 days

PRE-BOARDING

This phase existed in all but one business we spoke to. Companies reported a significant reduction in employees leaving during the probation period, after implementing a well-planned pre-boarding process.

Those that did it well also had rigorous checklists of what needs to be done to ensure the starter has everything they need.

This checklist either lives in a system ([pages 16-18 list the platforms mentioned](#)) or in a spreadsheet.

EXECUTIVE SUMMARY

— ORG CHARTS

Sending an org chart with pictures of each company employee and highlighting the new starter's department was mentioned several times. The org chart was always sent during the pre-boarding stage.

— EQUIPMENT AND WELCOME BOXES

87% of companies ensured that new starters receive a welcome box with 'swag' and their equipment before the first day of work (when possible). Some companies set up equipment, ready to go from day one. IT (if available) supports this step.

— A CLEAR SCHEDULE

Companies that reported positive feedback about their onboarding, also had prepared a 1-2 week onboarding schedule. This schedule was sent to new starters during the pre-boarding phase and included calendar invites for all key meetings.

EXECUTIVE SUMMARY

MEETING THE FOUNDERS/CEOS/MDS VIRTUALLY

Having the ability to meet the company execs and founders made new starters feel cared for – especially in the current climate. Ideally done in a 1-to-1.

This was harder for the larger organisations 150+ staff who ended up doing group Q&As with board execs. Or recorded personalised welcome messages.

EXPECTATIONS MET SURVEY

One company we researched sends a survey after 90 days that asks:

“Do you feel the company is meeting your expectations?”

If the answer is "no" – new starters tend to leave the company just before 9 months.

If "undecided" they stay a maximum of 14 months.

EXECUTIVE SUMMARY

VIRTUAL 1-TO-1 COFFEES / LUNCHES

Half of the companies interviewed gave their teams vouchers to have virtual regular coffees with new starters.

One company stressed:

"Make them vouchers though. Otherwise they'll just end up not doing the coffee meets, because it's too much hassle to expense them."

The companies that did virtual team lunches, ensured the 'meeting host' was equipped with lots of info about the new starter and had questions to fill any awkward silences.

EXECUTIVE SUMMARY

BOOKS TO READ

Those companies that seemed to truly adhere to their values, sent new starters books that accompanied these values and were mandatory reading during onboarding.

For example those that used [EOS](#) as their people ops framework, sent a copy of the book [Traction](#) to new starters during their onboarding.

It gave new employees a deeper understanding of the company's values, culture and why those values exist.

EXECUTIVE SUMMARY

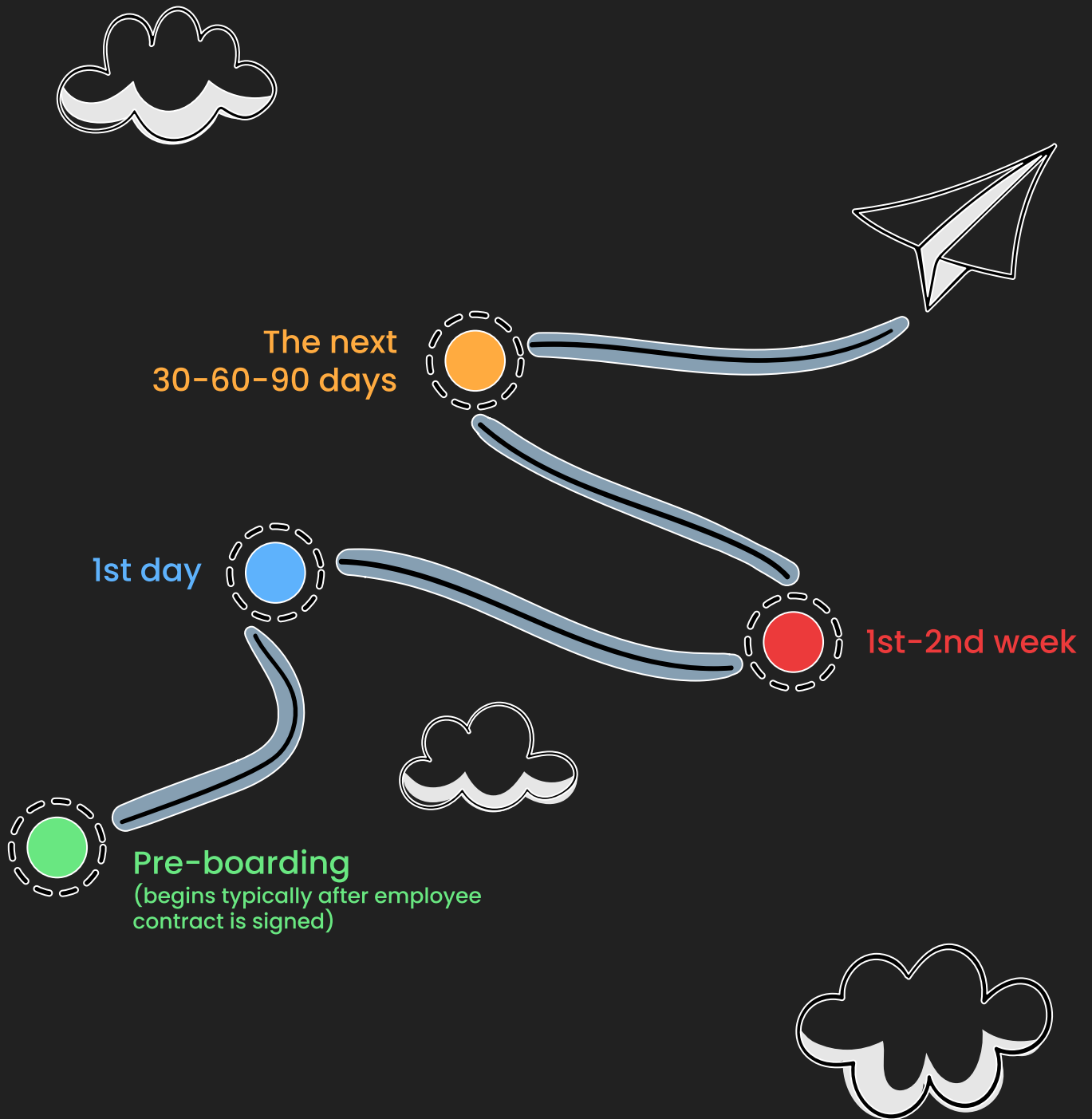
— INFORMATION OVERLOAD

There was a general caution about overloading new starters with information and virtual meetings. One went as far as capping meetings to max 3 a day (at a max 20 mins duration each) – especially on the first day.

Most companies had a clear policy around system 'notifications'. Making sure the new starter doesn't feel obliged to be 'seen online' to prove they are working. These guidelines also included expected response times.

The people ops director role is crucial here, as they will be the one person in the business new starters can come to for any help.

KEY ONBOARDING PHASES



PRE-BOARDING

COMMUNICATION RESPONSE RATE

(most companies reported to respond between 1hr – 6hrs to new starters throughout onboarding)

PERSONALISED LEARNING AND DEVELOPMENT PLAN

(included mainly self-directed learning to fill time when the new starter is not working on projects)

WELCOME PACK

(swag and personalised welcome letter sent to new starters – sometimes included a book related to company culture that must be read during onboarding)

OFFER LETTER PRESENTATION

(not part of pre-boarding, but the presentation of the offer letter often had an impact on the potential candidates perception of the company)

CHECKLISTS

(this helped companies ensure no detail is missed during onboarding – [see platforms that are used by our research candidates to create onboarding checklists](#))

**CLEAR OUTLINE OF
ONBOARDING
PROCESS**

(covers 1st-2nd week
plan, sent to new
starter and
accompanied by
calendar invites)

**ORG CHART WITH PROFILE
PICTURES**

(ideally also highlights
team new starter will be
in and sent with welcome
information)

**HARDWARE SENT –
IDEALLY FULLY SET UP**

(if available,
call with IT to ensure
everything is working
on 1st day of work)

**INVITE NEW STARTER TO
“ALL HANDS” MEETINGS**

(most companies
avoided inviting new
starters to ‘company
socials’ during the
pre-boarding phase)

**TALENT DIRECTOR
AND PEOPLE OPS
DIRECTOR REACH OUT
‘REGULARLY’**

(especially a couple
of days before
the ‘1st day’)

1ST DAY

WELCOME THE NEW TEAM MEMBER

(this was done
at the start of the day)

WELCOME AT MONDAY MORNING COMPANY MEETING

(and on comms platforms
too e.g. Slack)

PROFILE OF NEW STARTER

(for recruitment
marketing e.g. on the
website team page. Also
to introduce the new
starter to other team
members. If possible do
this during pre-boarding.)

WELCOME AT MONDAY MORNING COMPANY MEETING

(and on comms platforms
too e.g. Slack)

MEETINGS WITH LINE MANAGER AND PEOPLE OPS

(for support, social
interaction and reminder
of what to expect in the
coming days)

CLEAR GUIDANCE ON NOTIFICATIONS

(companies reported their employees felt under pressure to be seen online, to prove they are working. Companies had clear guidelines on expected response time, how often they need to check in and that it was OK to switch off notifications completely)

LIMITS ON MEETING LENGTH AND NUMBER OF MEETINGS

(some companies limited meetings on 1st day to 20 mins and 3 meetings)

1ST - 2ND WEEK

FINE BALANCE BETWEEN TOO MUCH INFORMATION AND NOT ENOUGH

(most companies made
non-essential meetings
and reading optional)

MEETING WITH PEOPLE OPS

(companies used this
meeting to communicate
cultural values, HR
policies and ensure the
new starter has all the
support they need)

MEETING FELLOW TEAM AND OTHER NEW STARTERS

(building
the first relationships
beyond line manager
and people ops)

MEETINGS WITH LINE MANAGER

(the research didn't
include line managers, we
have limited information
on this step. But for most
companies this meeting
appeared to be used to
explain
working processes)

MEETING THE FOUNDER AND EXECS

(this step was reported to get great feedback from employees. Some companies did a meeting with the founder or CEO once a week)

FINE BALANCE BETWEEN TOO MUCH INFORMATION AND NOT ENOUGH

(most companies made non-essential meetings and reading optional)

MEETING FELLOW TEAM AND OTHER NEW STARTERS

(building relationships beyond line manager and people ops)

MEETING WITH PEOPLE OPS

(companies used this meeting to communicate cultural values, HR policies and ensure the new starter has all the support they need)

MEETINGS WITH LINE MANAGER

(the research didn't include line managers, we have limited information on this step. But for most companies this meeting appeared to be used to explain working processes)

PAIRED UP WITH BUDDY

(generally either from other or same department, with a long term employee, or with someone senior if a junior)

VIRTUAL TEAM LUNCHEES OR 1-TO-1 COFFEES

(companies gave vouchers to employees, instead of asking them to expense)

INVITES TO VIRTUAL SOCIAL EVENTS

(further ways to feel connected with others in the company)

ORDER OF MEETINGS IN FIRST WEEK MAY VARY

(depended on availability and priorities of people involved)

MEET COMPANY COMMITTEES

(e.g. charity committee, social committee, etc. companies usually invited new starters to these meetings in the 2nd week)

REGULAR SUPPORT CHECK IN FROM PEOPLE OPS

(one people ops director added: *"There is no formula to how often you check in - it's simply a matter of good intuition."*)

PEER SUPPORT COMMUNITY FOR PEOPLE OPS / HR DIRECTORS AT AGENCIES

Your role is one of the most important roles in an agency. You know it. Your team knows it. But what your team doesn't know is how hard it is to be the one person everyone comes to with their challenges...

We get you and it's why we want to support you in your role at your agency.

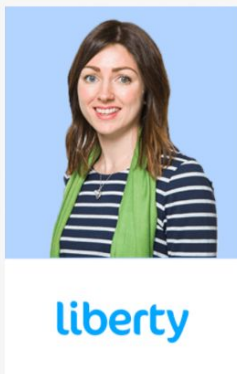
[Find out more about our community >](#)

Some of the great people ops directors in our community helping each other out...

Angela Duhig



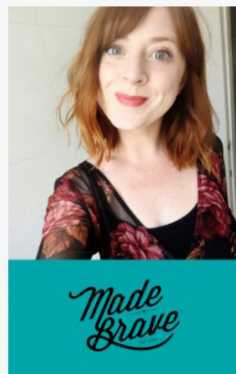
Emily Webb



Deanne Walsh



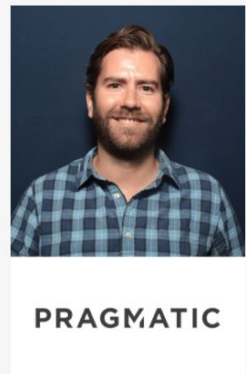
Hannah Davidson



Mizzy Lees



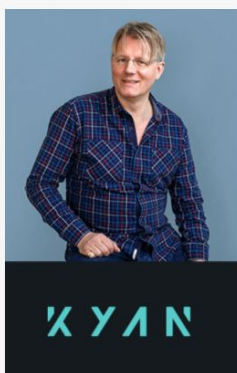
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Sean Butcher



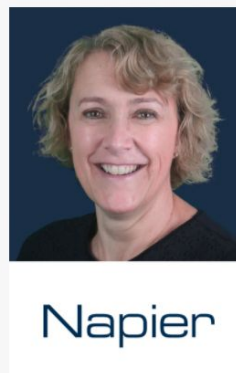
Piers Palmer



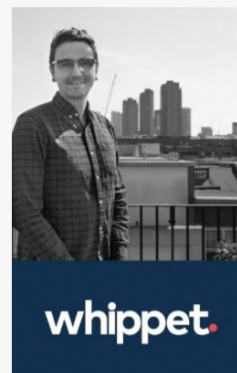
Debbie Adams



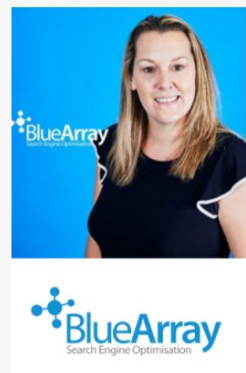
Debbie McIntosh



Max English-Merrick



Vicky Kollnberger



30-60-90 DAYS

30/60/90 day surveys

(to check whether new starter is meeting company expectations)



Employee satisfaction survey

(to check whether the company has met the expectations of the new starter – [see page 29 for more details](#))

SYSTEMS MENTIONED

**LifeLabs⁷
Learning**

www.lifelabslearning.com

Practical labs for life's most useful skills. Manager training. Teaching all workshops with a RADical lens (Remote + ADaptive skills).

go1

www.go1.com

The largest curated eLearning library from the world's top training providers. Also create and host your own 'internal' training courses.

15Five

www.15five.com

Employee performance and engagement platform. Includes pulse surveys, request feedback, OKR integration and peer recognition (High Fives).

 **Geese**

www.7geese.com

Employee performance platform. OKR goal-setting, agile performance reviews, continuous feedback, and career development plans.

SYSTEMS MENTIONED



www.citation.co.uk/atlas

HR and Health & Safety management platform.



www.bamboohr.com

All in one HR platform. People data & analytics, hiring, onboarding, preparing compensation, or building culture.



www.breathr.com

Complete HR platform. Covering areas such as holiday and illness management, expenses, payroll, talent management, and more.



www.printfection.com

Complete swag and onboarding pack management solutions.

SYSTEMS MENTIONED



www.eosworldwide.com

Entrepreneurial operating system (EOS). Complete set of simple concepts and practical tools to help team members develop.



[Wikipedia explanation](#)

Objectives and key results (OKR) is a goal-setting framework for defining and tracking objectives and their outcomes.



[www.wearewildgoose.com/
uk/](http://www.wearewildgoose.com/uk/)

...use the games example

www.sanctus.io

Access a network of coaches to help your employees talk openly about mental health.

FURTHER FINDINGS

— Mandatory reading to inform cultural values

In some instances new starters were obliged to read a book that reflected the cultural values of the company. This book was sent as part of the welcome package to team members and expected to be read during the onboarding period.

— 90 days expectation survey

One company (with 350 employees) gave a survey to new starters after 90 days asking them: "Do you feel the company is meeting your expectations?"

If the answer was "no", they tended to not last longer than 9 months.

If "undecided" 14 months max.

FURTHER FINDINGS

Socials

From quizzes to Friday drinks and everything in between. The majority of companies in the research had tried some form of virtual social event in the past 12 months to keep morale up and connect new starters with their colleagues.

The hardest thing was to keep up ongoing interest, once the novelty passes.

Here are some ways that stood out in our research and helped new starters meet others in a social context:

1-to-1 virtual coffees

(using vouchers to avoid the need for expensing – a company reported that people wouldn't do the coffee meets before they used vouchers)

"2 truths and a lie" game on Slack / Teams

(a fun way to get to know colleagues better)

Whatsapp group

(purely for social chat)

FURTHER FINDINGS

Buddy systems

Almost every company in the research had a buddy system for new starters. The main aim in all cases was for new starters to meet others in the company. Companies reported the added benefit of easing the pressure on line managers, because it provided an alternative person to ask for support.

There were different implementations of the system, those most frequently mentioned were:

- A. Being paired with someone who is not in your team or with the same skill set
- B. Being paired with someone who has been in the company for a number of years
- C. Being paired with a senior if new starter is a junior
- D. Being paired with someone with the same skill set (e.g. developer and developer)

MENTAL WELL-BEING

At Polymensa we recently had the pleasure of speaking to human systems coach - [Daryll Scott](#) - and people engagement expert - [Mark Harland](#) - about mental well-being of team members at their agencies.

We wrote a post about the key learnings and practical tips from those two sessions.

[Read all the mental well-being tips here >](#)

3 key areas of human systems

Simplified these 3 key areas are:

1. The world around us and everything that happens in our environment
2. How do we feel about it?
3. How do we choose to feel about it?

Monotony - deprived of contextual stimulation



Psychological Needs

Rational	Emotional
Mastery Learning Control Clarity Competence Challenge	Teamwork People Trust Openness Authenticity Love

Self Determination Connection

DARYLLSCOTT.COM

can make a positive change in each one of the key three areas of:

We are all carrying the symptoms of dealing with loss

Mark rightly pointed out that we have lost a lot of things in our life this year. Simple things

FURTHER FINDINGS

— Personality profiling

One company highlighted personality profiling of new starters to aid their learning and development. New starters needed to complete an Insights Profile and Motivational Map during their pre-boarding.

— Importance of the people operations role

In most of the companies researched the people operations role played a significant part in ensuring new employees feel supported at any time.

— Lookbook profiles

At some of the companies each new employee completes a profile about themselves during the pre-boarding stage. This is then shared with the rest of the company at the first All Hands meeting.

FURTHER FINDINGS

— Frameworks

Some of the companies used strategic frameworks to guide the learning and development of their team members.

The ones mentioned most frequently were [OKRs](#) and [EOS](#). These frameworks can help align a new starters career path through the company from day 1.

— Trial period

One company offered a four-week paid trial to potential candidates. An opportunity for both sides to assess each other. Either party could walk away from working with each other at the end of the trial.



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