

Planning & Preboarding

Planning and preboarding are the foundations for your onboarding program because they set the tone for employees' early experiences with your organisation.

Consider the impact that an effective or poor onboarding experience has on every new employee who enters your organisation. Investing time to plan out your employee onboarding program can have a positive ripple effect on your employees and organisation. The onboarding experiences you create will impact business metrics, such as employee retention and turnover, and your reputation as an employer of choice.

So, what are some steps you can take to plan out your onboarding program?



Outline your onboarding goals

Building an onboarding program with the end in mind means working backwards from day 90 to your new employee's first day. Putting new employees first makes them feel that they made the right choice by joining your company. Onboarding isn't a race, it's a journey. Pace and spread out the information over time.

Map out the employee onboarding journey

Mapping out the employee onboarding journey is the starting point for a strategic and experience-driven onboarding program. When you thoughtfully craft your onboarding program with moments for check-in, digital touch points and experiences, you begin to build consistent, feedback-driven and measurable experiences for all new employees.

Engaging managers in this process will lead to a smoother transition into your company and reduce the anxiety that comes with change for both new and existing employees

Automate your onboarding

Automating your onboarding program helps streamline efficiency, reduce costs and create more meaningful work for your teams. When you eliminate manual onboarding administration processes with automation, you free up time to focus on higher value tasks.



Seven Steps to Building an Effective Onboarding Plan

1. Outline your onboarding goals
2. Map out key milestones and moments that matter along the onboarding journey
3. Build your programs, onboarding decks, documents and training materials
4. Identify how you will measure success at different points along the onboarding journey
5. Identify ways to scale, modernise and automate your process
6. Standardise and improve your processes incrementally
7. Regularly report feedback and results of your onboarding program to key stakeholders

Preboarding

Onboarding starts before day one. In fact, it begins the second your new hire has officially accepted your offer. “Best-in-Class” companies are 54 percent more likely than others to start the onboarding process prior to the first day.

We call this stage the preboarding process — everything you do to get your new team member situated prior to walking in the door for their first day. This sets expectations, allows new hires to adequately prepare, and instills comfortability and confidence as they know what’s to come.



New hire paperwork

Compliance is important for every business, and you can begin filling out required documents and forms before they enter your store. You'll need basic information, including name, address, date of birth, email, and emergency contact. New for 2020, employers must provide new hires a copy of the [Fair Work Information Statement](#), and it's also recommended to provide a copy of the [awards documents](#).

A quick note on types of retail employees: In Australia, employees can be classified as full-time, part-time, and casual. In the retail setting, these employees are typically casual workers. Full-time and part-time workers have a fixed term contract and are scheduled consistently each week. Casual workers have a more flexible arrangement — instead they have no guaranteed working hours, may be scheduled irregularly, don't receive paid leave, and can end employment without notice (unless otherwise agreed to in writing).

You'll also need to provide the following in the onboarding process for new employees:

- Employee contract and confidentiality agreement — you can use [templates from the Australian Fair Work Ombudsman](#)
- Bank account details (for direct deposit wages)
- [Tax file number \(TFN\) declaration form](#) (NAT 3092) — employers are required to give this to new hires and submit it to the fund within 14 days of receiving it from the employee

- **Superannuation standard choice form** (NAT 13080) — **designate an employer nominated fund**, which is a default super fund for when an employee can't or doesn't choose their own
- A copy of their driver's license or photo identification
- Working visa (for non-Australian citizens)

You can also distribute, or make available:

- ▶ Official job title and description
- ▶ Employee handbook
- ▶ Code of conduct
- ▶ Store policies and procedures
- ▶ Information about your brand, products, and customers
- ▶ Store and working hours
- ▶ Break schedules
- ▶ Benefits
- ▶ Health declaration outlining special medical requirements
- ▶ Holidays and leave
- ▶ Where to go on day one and who to ask for on arrival
- ▶ Dress code
- ▶ Keys or access card
- ▶ Schedule or agenda for first day
- ▶ Store map
- ▶ Employee portal access

Important: This can be incredibly tedious, boring, and uninspiring for your new hires. It's important to spell out why you need this paperwork, and how it benefits them specifically. For example, if they provide their banking information ahead of time, they'll get their first paycheck more quickly.

In fact, businesses that do [increase onboarding efficiency by 85 percent](#). You can then centralise all of the documents and onboarding materials for easy access by both managers and associates. Not to mention, a digital onboarding programme ensures confidentiality. Workplace regulations company [Employsure](#) uses Flare HR's digital onboarding tools as an end-to-end employee onboarding process to track employees throughout their tenure.

Get to know your new hire

Ask new hires to fill out a questionnaire with some information about themselves, including where they're from, their interests and hobbies, and career aspirations. You can also conduct an entrance interview on their first day. This information will serve as a base for many onboarding steps to come.

Onboarding Checklists



Compliance forms checklist: Bank, Tax and Super only

Manage bank, tax and superannuation in compliance with the [Fair Work Obudsman](#) and [Australian Taxation Office \(ATO\)](#)

- ❑ **Provide these forms to new employees:**

- ❑ [The Fair Work Information Statement](#)
- ❑ [Tax File Declaration Form](#)
- ❑ [Copy of relevant Award](#) (if applicable)

- ❑ **Collect these forms from employees:**

- ❑ [Superannuation form](#)
- ❑ Bank account details form

Shifting to a compliant **paperless onboarding** process **increases HR onboarding efficiency by 85%** with Flare HR's free software. [Request a demo.](#)

- ❑ **Manage tax processes with payroll:**

- ❑ Collect tax from payments you make to employees via [PAYG withholding](#)
- ❑ Review the [popular official tax forms](#) as an employee and for your employees

Pay

Manage pay practices in compliance with the

Fair Work Obudsman

- Confirm the **right pay rate** for your employee. Pay rates in Australia are established through the national minimum wage, award, enterprise agreement or other registered agreement.
- Manage and file pay slips and documents. **Pay slips and record-keeping** are mandatory.
- Review all pay practices, including **minimum wage, deducting pay and overpayments, penalty rates and allowances, unpaid work**
- Review **tax and superannuation** obligations in your award
- Ensure compliance by engaging people or organisations that specialise in employment law or conducting due diligence via the Fair Work Obudsman

