Dipstick NGO
Onboarding Practices Benchmarking

Final Report

2024 August

This document is shared as a public document, towards strengthening our ability to support our employees, and is meant as an input to decision-making for Indian non-profit organization leadership.

Please feel free to share with others.

RAAHI:IMPACT
WITH GIRISH ANANTH

Foreword: About the Document (1/2)

Why?

We all remember many of the "firsts" in our lives, personally as well as professionally. Needless to say, the first days and weeks of an employee in an organization is sure to leave a significant impression on them, and how they engage with the organization.

Onboarding, i.e. facilitating that integration process of the first many days/weeks of the employee, navigating a new office, new people, new processes, **is a critical process that most organizations do for their new hires.** Research shows that employees who have an exceptional onboarding tend to stay significantly longer in organizations.

At the same time, onboarding is never important enough in our priority list to discuss. In the four years I was part of a non-profit leadership team, we discussed onboarding and revised the induction process multiple times – but as I look back, not once did I take the time to ask around about how other organizations do it, and learn from others' best practices. It wasn't ever the focus of the conferences and talks I'd attend, and naturally, I wasn't ever at the receiving end after I had joined, to learn through lived first-hand experience.

And so, when the opportunity presented itself, **we have this report: a dipstick benchmarking and knowledge sharing of Onboarding practices across 40+ non-profits across India.**

How?

This has been built much along the same lines as the previous Raahi:Impact reports – the Compensation & Benefits benchmarking and NGO Travel Policy Benchmarking: a rapid, community-driven exercise, and with wonderful NGO founders/HR leaders sharing their concerns and their knowledge via a survey, and it being synthesized into this report.

The report took a surprising amount of time to prepare – a good 30 hours of work – because of the amount of detail provided by all the participants. **There was rich information in there** I didn't want to lose out on. Along with the quantitative percentage analysis, much of the work was absorbing and synthesizing meaning from the detailed comments provided, and then presenting it in a consumable format on slides. You will find that this report, more than the previous ones, emphasizes more on qualitative comments and reflections, and what you can take inspiration from, than a primary focus on quantitative data.

Also – while I am a proponent and power user of ChatGPT, the services of AI tools were not employed for this exercise: to meaningfully and reliably bring it together, required me to read through, break down and connect the dots to build an understanding of the broader implications myself, to then share with you.

Foreword: About the Document (2/2)

What?

And so, in this report, you will find **a structured set of insights** around onboarding practices of NGOs – from pre-joining practices to induction to impact tracking of the onboarding. For each section, there are **synthesized highlights** as well as many of the **verbatim responses** provided, to really give the flavour of the inputs. There are also **bonus pages** with tools / templates / ideas shared by participants.

So what?

I hope this report helps you reflect on and strengthen your Onboarding practices – and more broadly, help you invest meaningfully in Professional Development practices. **If we collectively strengthen our practices, we can truly up the game, to help our employees become our assets and ambassadors.**

And of course, I would love to know your feedback and be happy to take questions. For anything, write to me anytime at raahi.impact@gmail.com. And please do share this along to others who may benefit.

Regards,
Girish Ananthanarayanan
September 2024
Raahi: Email | YouTube | Instagram
Raahi LinkedIn | My LinkedIn

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Check out the

NGO Travel Policy 2024 Benchmarking Report

Check out (and subscribe to)

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What is onboarding?

Let's get on the same page.

This schematic provides an overview of the terms used in the document, to describe the phases of onboarding, and how they are meant.

Focus of this document

Hiring need identified		
	Recruitment	Process of selecting candidates who fit the role needs and the organization culture
Offer of employment given and accepted		
	Pre-joining Onboarding	Phase of helping a new hire prepare for Day 1 in the organization, providing relevant documents and pointers
New hire joins the organization		
	Induction	Initial high-intensity onboarding phase, where the new hire is provided an overview of the organization's purpose, expectations from them and support available.
New hire gets into the swing of work		
	Orientation	A longer, lower-intensity onboarding phase, where the new hire is supported to be fully understand the nuances of the organization.
New hire is fully integrated into the organization		

This document is structured around these three phases.

How to use this document (and how not to)

Use this document for inspiration.

Many organizations have provided their practices for common welfare. Yet, remember there is no absolute right or wrong here – **use this document for inspiration and reflection, not as a guidebook** on what exactly you need to do.

Also, remember that **a *common* practice reported doesn't mean it is a *best* practice**. The organizations are all in their own journeys – so in some places, you could definitely be innovating and going beyond what is typically done.

Respect everyone's confidentiality, and use the document judiciously.

This document has been made through the trust of many organizations, sharing their data and practices for common use. There has been immense care taken to ensure no personally identifiable information about any organization is made available. **In case there is something you do notice, please write to me here**.

Ultimately, what matters is your own individual strategy.

Remember, **all participants are at different stages of growth and different funding situations**. Ultimately, the use of the document will depend on the organization strategy, team size, requirements and ability. We've all been through the ups and downs – so don't let anything in the document concern you!

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How to Read this Document

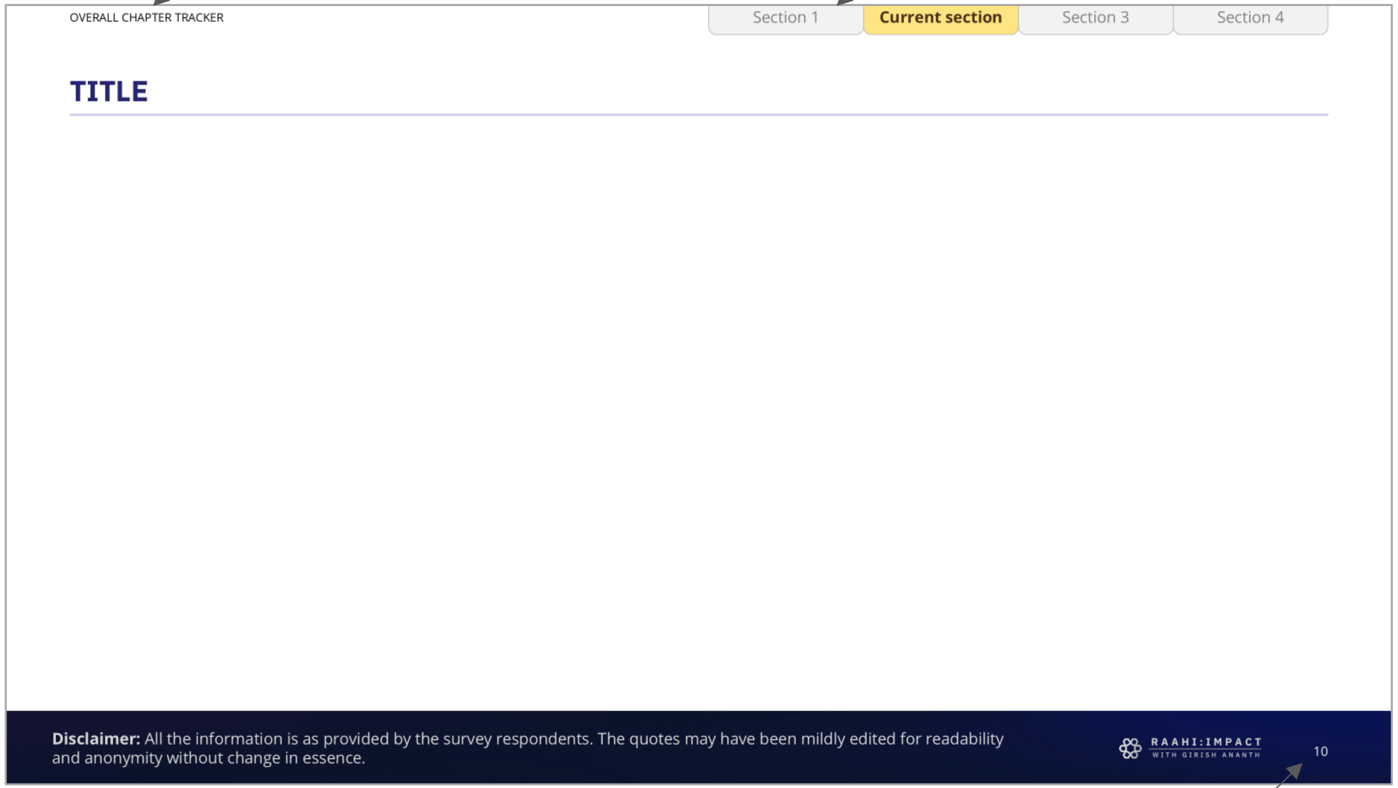
An overview of a typical page so you can follow the document.

Overall Chapter Tracker

Follow where you are in the *document* with this.

Section Tracker within Chapter

Follow where you are in the *chapter* with this.



Slide number

You can use this to refer to a particular slide, when sharing with a friend.

Also – please don't be overwhelmed seeing this is an 80-page document.

The key information is easily available in a few pages.

Many of the deep-dives are available only in case you want to go in depth on any point. ☺

Table of Contents

★ Potentially most useful

Contents

Disclaimer: All the information is as provided by the survey respondents. The quotes may have been mildly edited for readability and anonymity without change in essence.

Participant Profile

Overall

- We had **41 participating organizations** from across India, who filled in the survey form.

Budget Size

- The organizations are **spread across a full range of budget sizes** – from INR 5-50 Lakhs, to INR 50-200 Crores in annual budget.
- **Almost half** the participating organizations are in the **INR 5-20 Crores range.**

Sector of Work

- The largest sector called out by participants is **Education**, followed by **Health**.
- There is also a significant set of organizations working towards **child protection, livelihoods, vocational education, employment** etc.
- There are also mentions of technology, urban development, community development, etc.

Staff Size

- The organizations are **spread across a full range of team size** – from less than 25 employees to over 500 employees. However, **80%** of the participating organizations have < **250 employees.**
- The organizations are **spread across a full range of team composition** – from no field staff, to 80% of staff as field staff.

Hiring volume

- A majority of participants (50%+) hire 3-10 employees per month, on average. However, many indicate that this may not be a regular flow. Overall, it is clear that most of the participating organizations **hire in small batches**.

Pre-joining Practices

Pre-joining Events

- Less than half the organizations indicated any pre-joining events with the new hires.
- Some mention this is not done as a practice; it **happens on occasion**. Some others indicate this is usually done in **senior management hirings**.
- Those who do, may **facilitate conversations with team members**, or **organize office / field visits** to ensure the new hire fully understands the role context before joining.

Pre-joining Materials

- **A little less than half** send any materials before joining.
- Those who do, typically **send basic materials** (policies, org overview). Some go further, sharing **onboarding plan, access credentials and support team's contact details.**

References and Background Checks

- **Reference checks:** 17 organizations (40%+) explained that what they do is reference checks. Everyone agrees its best to do this before joining – in fact, before rolling out the offer letter.
    - Typically there are 2 reference checks with the previous organization, to check for any flags.
    - This may be done via email, forms or calls, typically.
- **Background verification:** 6 organizations (~15%) mentioned doing a deeper background verification, (e.g. asking for a police clearance certificate) along with the reference checks, along with references.

Induction Overview (1/2)

Formality

- **A majority (26 organizations, 63%) have a formal and structured induction**, while almost all the others (13 organizations, 32%) have a semi-formal induction.

Group size

- A majority (~65%) of the participants indicated that the **group size for induction is typically 1-3 new joinees**.

Duration

- The duration typically **varies between a day and a week-long induction.**
- 12 organizations (29%) do one-day inductions, 10 (24%) do a week-long induction, 7 of them (17%) do a two-day induction and 5 of them (12%) do a 3-4 day long induction.
- 2 organizations each indicated that they have 2 weeks/month-long induction

Frequency

- **Half the organizations indicate that the inductions are done in an ad-hoc manner**, i.e. as and when required. This is understandable given the hiring patterns also vary over the year.

Location/medium

- The most common methods are to do it virtually (27%)**, in the Head office (20%)** or as a hybrid of the two (27%).

Induction Overview (2/2)

Location/Medium

- A mix of methods are mentioned; most commonly it is **in-person session and/or online modules** that are planned.

Content focus

- The highest focus is on "**HR policies**" and "**Organizational history and values**".
- The least focus is on "**Diversity and Inclusion training**", even below "**Health and safety protocols**".

Broader Orientation beyond Induction

There is a spectrum of responses in terms of a broader orientation beyond the initial induction.

- Some organizations mention a 3-4 week, or 3 month ongoing training for their teams. Some others mention planned check-ins with the team members
- **Many place the responsibility for** the further orientation after induction to the **respective project teams / managers**.
- A couple of organizations **emphasized observations and job shadowing** as a way for the new hire to learn.
- Four organizations said they don't have any sort of broader orientation after the induction.

Support Structures for Onboarding (1/2)

Role-specific Training

- Largely, the participants believe it is the **respective teams'/Department's responsibility** to do the role-specific induction.
- Some also consider '**On-the-job training**' as the role-specific training.
- In some cases, it is split as Program and HQ roles; in some cases, it is provided for sensitive roles.

Online Portal with Resources

- This seems to be **mostly ad-hoc.** They are typically in the form of PPTs/videos loaded on a Drive, and/or to a HR Management System.
- Some of the structured approaches laid out include **Google Classroom, Keka Learn, a common server or an induction site.**

Buddy System

- **Half the organizations indicate they have a buddy system**, and another quarter indicate they have this partly. Many orgs indicate detail behind – e.g. having clear selection criteria for the buddy.
- In some cases, the organization **assume the reporting manager or the HR will be the default go-to buddy** for the new hire.
- The buddy system has been called out by many as their **best practice**; one also has given a sense that **this is hard to get right** – probably because of the commitment required.

Support Structures for Onboarding (2/2)

Mentoring

- While a majority (~75%) have indicated they provide some form of mentoring, it seems to mainly be as **support from the manager of the new hire**.
- Some good ideas shared by participants include **tagging a specific leadership team member** to each employee for mentor in the initial stages; **assigning sector leaders** to some team members as mentors.

Job Shadowing

- Many do it consciously, as part of the role-specific training. The main question seems to be one of **bandwidth to do it** – and the tension of needing the employee to be productive ASAP.
- Some organizations believe it is **enough for them to see their supervisor at work**.

Networking Events

- There are only a few organizations (4, i.e. ~10%) that **create networking events** for their new hires; e.g. playdates, workshops.
- Many use the **organization events as a proxy**, and some expect the networking to be led by the new hire.

Materials Provided during Onboarding

Job Description

- Most organizations **have a Job Description that is part of the offer/appointment letter**. Some organizations also have KRAs that are shared to the new hire, along with the JD.

Organization Chart

- Many organizations direct new hires to find the organization chart and relevant contacts **on the HRMS, or share a soft copy** (e.g. PPT) with them. One organization indicated that the org chart is **shown and discussed during the induction**, though not shared.

Organization-specific materials

- Many organizations do this **virtually** or direct the new hires to **a website/HRMS system** for soft copies.
- The **typical documents** include –documents covering the org journey, annual report, org policies / employee handbook

Digital Resources

- Some organizations have a **Learning Management System** set up (e.g. Keka Learn, Abhyaas.org) for curated courses new hires are expected to go through.
- Many mention providing **resource banks** in the form of PPT/ Videos / YouTube links on a website/Google Drive / Google Classroom.

Welcome Kit

- A majority of the organizations (~60%) give **some form of a welcome kit**.
- This may range from just **IT stuff**, and a **basic welcome kit** including stationery (notebook/diary/notepad and pen). Beyond basics, this could also include **bag, organization T-shirt, ID card, Business card** – along with a welcome note.

Impact Tracking

Feedback Collection

- **~70% of organizations** (29) indicate doing some type of feedback tracking. The most typical approach seems to be a **feedback form**, along with **informal feedback / regular check-ins** with the new hire.

Feedback Analysis

- Largely, the feedback is seen by HR team, along with the organization leadership. The feedback is used to **revise the induction docket** and **improve the orientation**. (However, the feedback provided is not specific and clear; it seems likely that this is quite limited as a focus area.)

Attrition Analysis

- This is said to be done by **~75% of organizations** (30 organizations) in some form. This is done monthly / every 2-3 months / 6 months, depending on the organization. In one case, given the hiring is quite limited, it is yearly.

Probation Period

- 14 of them (33%) mention it as **6 months long**, and another 25% indicate it as **about 3 months of probation**.
- The probation period is sometimes **differentiated by role**, and extended basis performance.

Ensuring Onboarding Completion

- In many cases, the ensuring of completion is **integrated into the process itself** (e.g. calendar invites, a formal handover, making it a KRA, have a check-in scheduled at the end of the first month, etc.) Many keep a **checklist or tracker** for ensuring completion too.

Reflections – Challenges

Challenges

Organizations call out challenges across a range of areas. The top areas are:

- **Recruitment:** Finding the right talent, timely responses from candidates, and candidates backing out
- **Bandwidth:** Staff availability to conduct inductions, bandwidth of HR team to run the operations, leadership priority and time investment in face-time with new hires
- **Induction operations:** Ensuring a structured and systematic process, time constraints and scheduling, and other ops issues (e.g. onboarding them onto multiple platforms.)
- **Induction session design:** Managing information overload, tailoring induction to roles and ensuring quality of sessions in the induction.
- **Tracking and new hire engagement:** Tracking systems and technology to manage inductions, and ensuring participant engagement
- **Ensuring success of induction:** Ensuring integration and connections, especially with remote work; ensuring completion of induction and so on.

Looking to design more engaging and effective sessions?

In this 10-minute video on "Raahi: Impact Journeys", you will find five techniques inspired by the world's best teachers and trainers, that can help make your sessions more engaging, interactive and effective.

Reflections – Advice and ideas for organizations (1/2)

Pre-joining and joining

- **Interviews:** Three-point interview system; collecting feedback from rejected candidates
- Pre-joining comms for a smooth induction
- Resources for induction
- Ensuring induction happens for all

Warm welcome and ensuring process

- Keeping the induction warm and welcoming – e.g. welcome kit, introductory email to entire team, etc.
- Ensuring process – including dedicated onboarding days, timely admin completion, customized inductions, etc.

Induction Content and Pacing

- **Induction content** – e.g. handover of previous performance reports of team members , discussion of responsibilities and KRAs, etc.
- **Induction pacing:** Minimizing information overload, giving the new hires time to settle
- **Leadership exposure:** ensure that you have face-time of new hires with org leadership

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Reflections – Advice and ideas for organizations (2/2)

Support Structures

- **Buddy system and shadowing:** These seem to be critical best practices many organizations call out
- **Field / exposure visits and Observation:** To ensure new hires can understand the organization's work and their role in practice.
- **Others:** Role-specific induction, mentoring, sharing resources and keeping up a fun environment.

Monitoring & Evaluation, and Checking In

- Ensuring monitoring and evaluation
- Ensuring regular check-ins *(e.g. 30-60-90 model)* and touchpoints for feedback.

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Thank you to all the participating organizations!

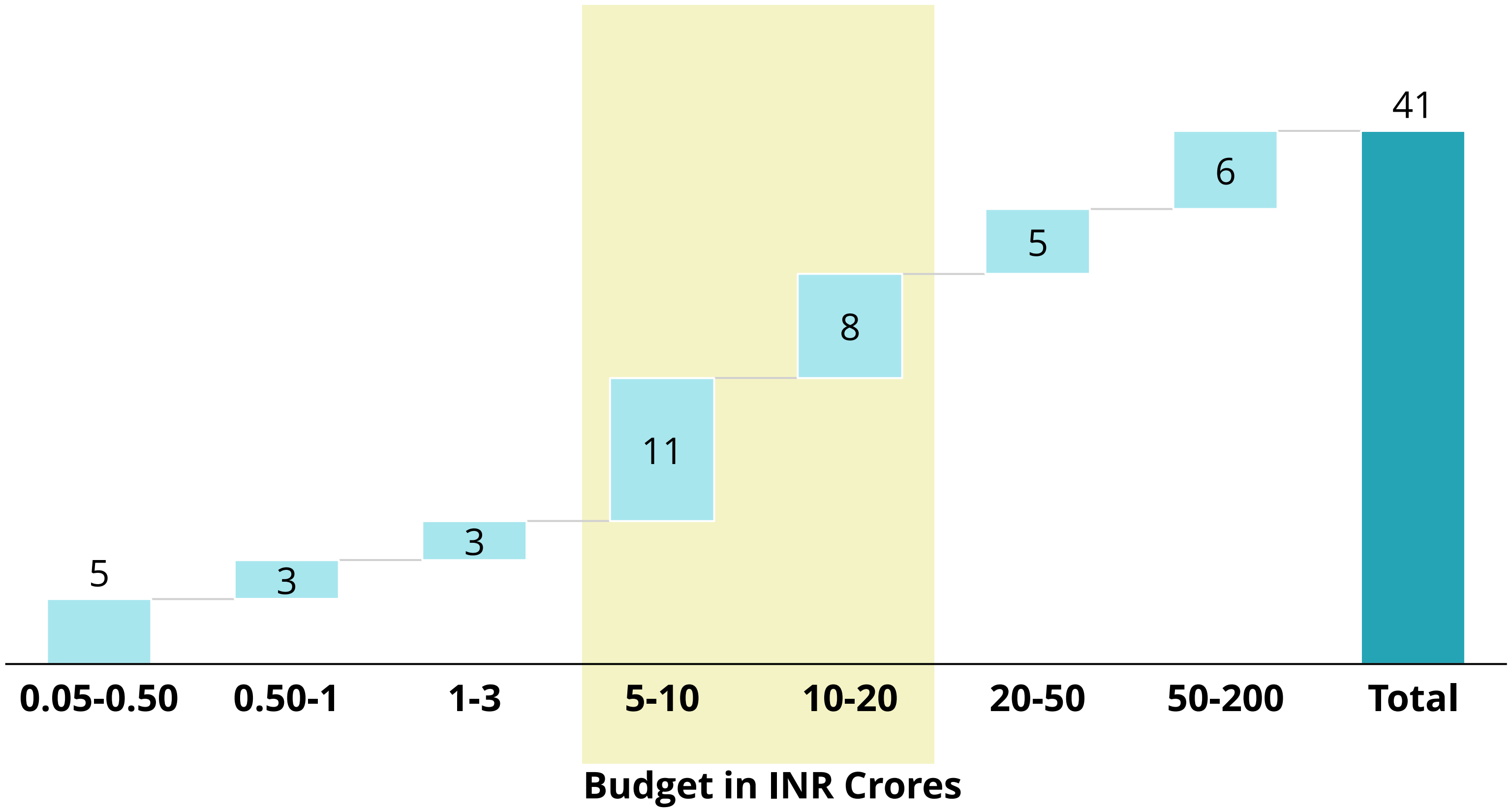
Your participation has enabled and empowered this report – and for that, you deserve a shout-out!

- Adhyayan Quality Education Foundation
- Ambdhkar Yuva Jana Samkshama Sangam
- Arpan
- Bhumi
- Centre for Promotion of Equal Rights
- Committed Communities Development Trust
- Concern India Foundation
- danamojo
- Educate Girls
- FMCH
- Foster and Forge Foundation
- Grameen Foundation for Social Impact
- Indus Action Initiatives
- J&K Students Welfare Mission
- Jai Vakeel Foundation and Research Centre
- Janaagraha Centre for Citizenship and Democracy
- Karunya Trust
- Key Education Foundation
- Leadership For Equity
- Lend A Hand India
- NalandaWay Foundation
- Open Links Foundation
- Project Flashlights
- Project Tech4Dev
- Rubaroo Breaking Silences Foundation
- Saajha
- Sajhe Sapne
- Shraddha Maanu Foundation
- Sol's ARC
- Suvita
- Swasti
- Teach For India
- TechnoServe India
- The Akanksha Foundation
- The Apprentice Project (TAP)
- TNS India Foundation
- U&I Trust
- Udhyam Learning Foundation
- Ummeed Child Development Center
- United Way Mumbai
- Volunteer for India

The participants are spread across a range of budget sizes

Budget categories of participants

Number of participants in each category (Budgets in INR Crores)



Key Highlights

- The organizations are **spread across a full range of budget sizes** – from INR 5-50 Lakhs, to INR 50-200 Crores in annual budget.
- **Almost half** the participating organizations are in the **INR 5-20 Crores range.**

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The participants are also spread across a range of sectors, with a leaning towards education, health and skilling/vocational

Overview of sectors of work of participants

Word-cloud of participants' responses

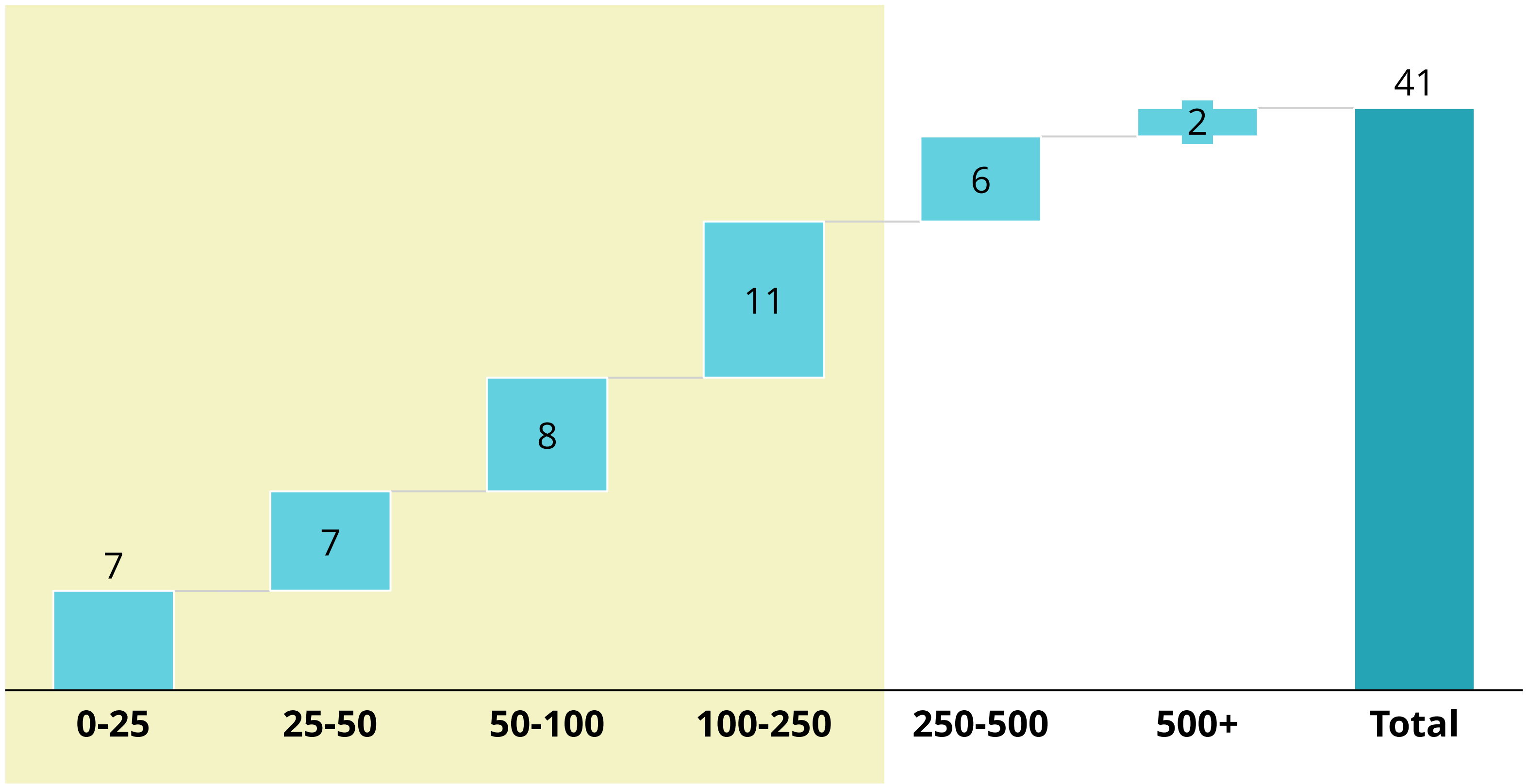
Key Highlights

- The largest sector called out by participants is **Education**, followed by **Health**.
- There is also a significant set of organizations working towards **child protection, livelihoods, vocational education, employment** etc.
- There are also mentions of technology, urban development, community development, development, etc.

Most participants have < 250 employees

Staff size of participants

Number of employees



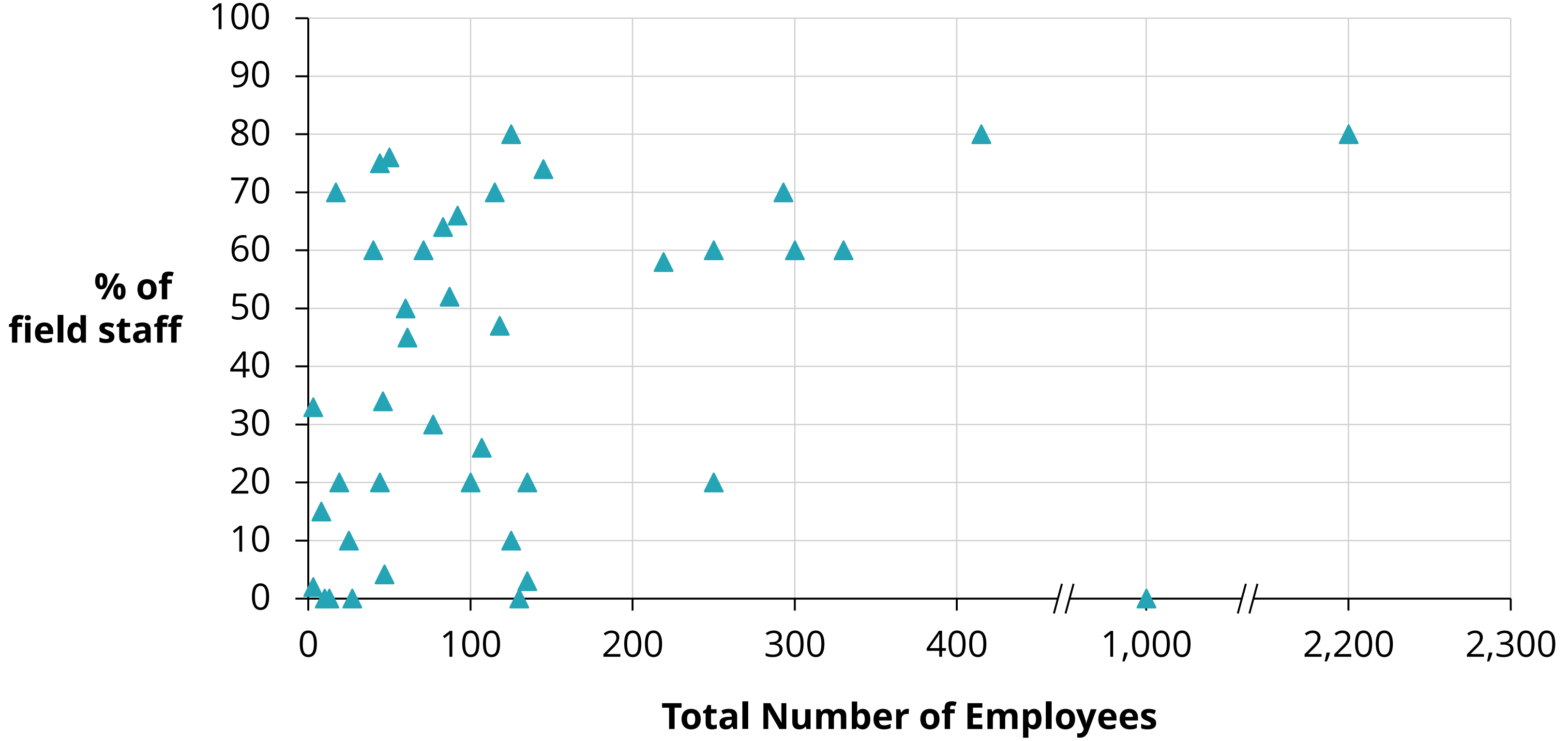
Key Highlights

- The organizations are **spread across a full range of team size** – from less than 25 employees to over 500 employees.
- However, **80%** of the participating organizations have **less then 250 employees.**

The participants a wide composition of teams, with field staff ranging from 0% to 80%

Staff size vs. Percentage of field staff of participants

Number of employees; % of field staff



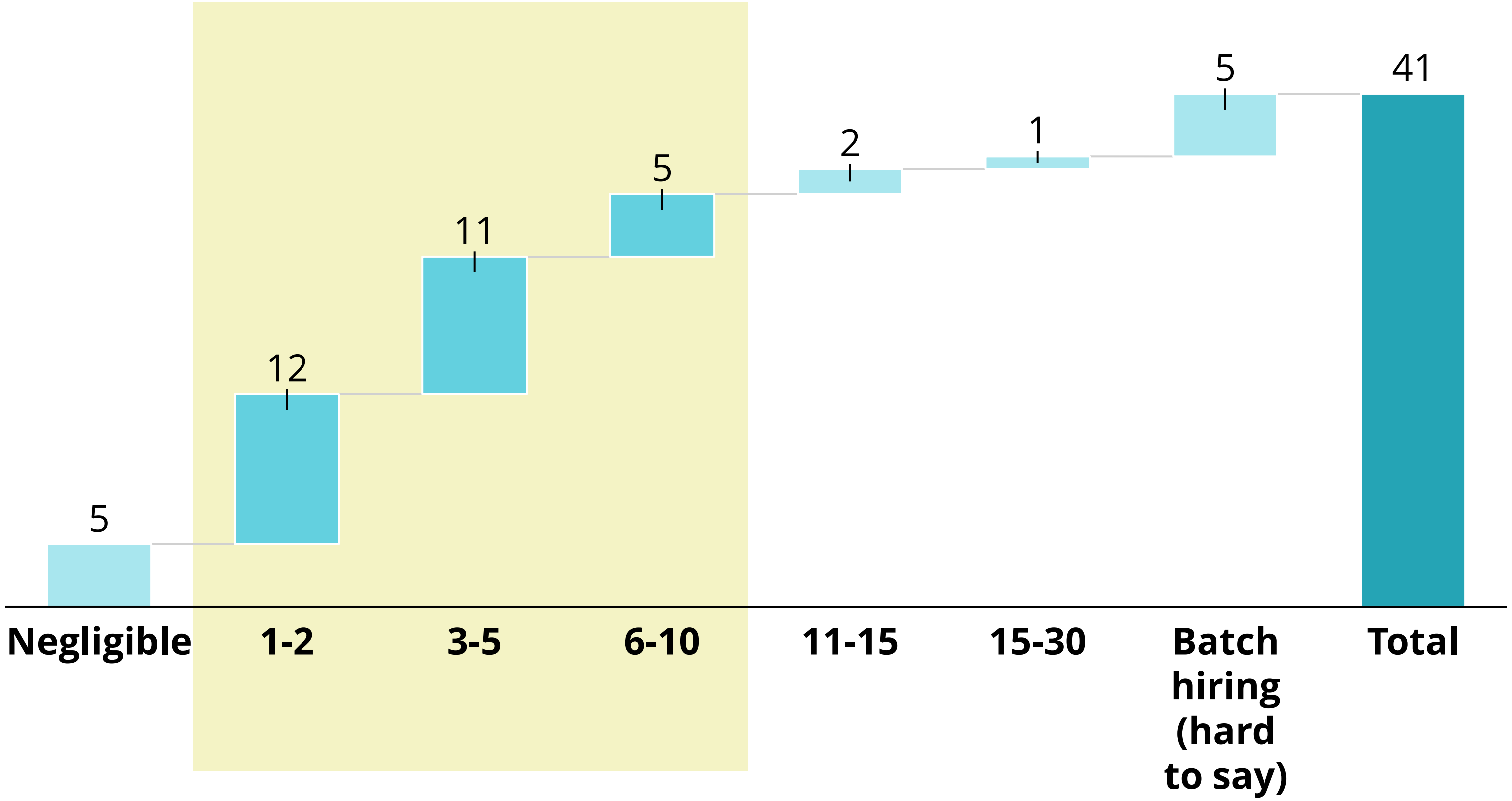
Key Highlights

- The organizations are **spread across a full range of team composition** – from no field staff, to 80% of staff as field staff.

A majority of the participants typically hire 1-10 employees a month

Number of new hires per month of participants

Number of participants in each category (Number of new hires per month)



Key Highlights

- Overall, it is clear that most of the participating organizations **hire in small batches –** typically 3-10 new hires per month.
- This question may be seen in perspective – while many have indicated an idea of the number of new hires per month, this may also vary across the months.

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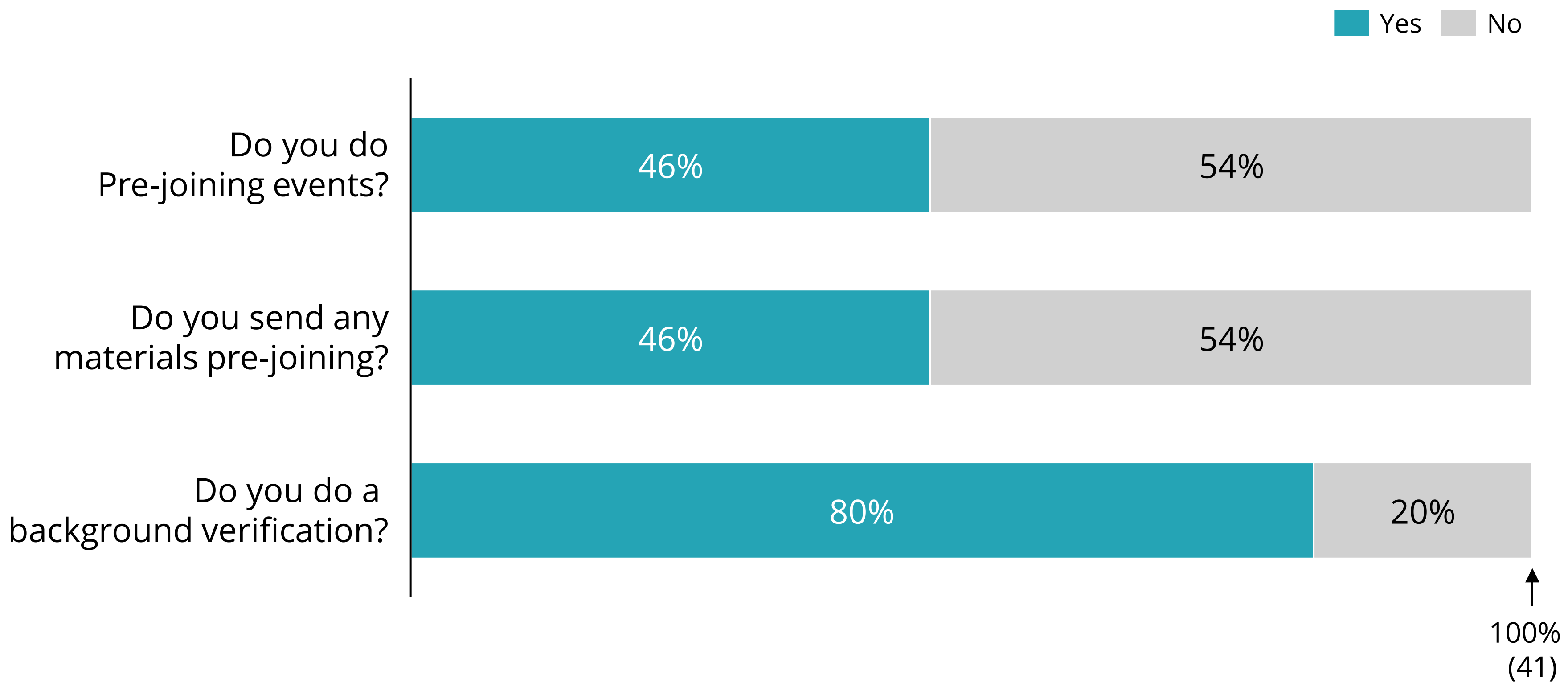
Less than half the participants engage meaningfully with their new hires before they join the organization, beyond background verification

Modes of engagement with new hire before joining

Percent of respondents answering Yes/No



A range of answers seen. See deep-dive.

A range of answers seen. See deep-dive.

Mostly folks do reference checks. Some do police clearance, etc.

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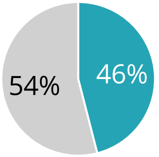


Pre-joining events: **There are a spectrum of intensity – from not engaging at all to consciously engaging**

Not really

Some start the onboarding process only post-joining. However, some call out **"strategic Interviewing",** consciously plan for the candidate to have met all the relevant team members through the interview process itself, as a way to integrate the candidates.

In Some Cases

Not as a Practice: 3-4 participants mention this is done 'on exception, if we get a chance', and it is not a 'compulsory step', or has to be an explicit request from the new hire.

*"**Not a compulsory step** in the process and also not done for all employees. For employees who have diverse needs, meetings with Line Managers / team members & HR is scheduled to understand support requirement and set expectations In the off-chance there is an event, some organizations can invite candidates to join."*

*"It depends on the individual. Before joining, **if they wish, they can connect with team members**. Upon joining, we send out a welcome email and officially conduct the induction. They are also welcome to visit the office and spend a day observing the environment and culture."*

For Senior Management Hiring: 3-4 participants mentioned this is done for senior managers/directors' role hiring – provide more organization context and to ensure culture fit.

"Yes, for Senior managers and Director's role hiring, we arrange a team meeting / interaction with the entire team and peers interaction before we set a joining date so that they are well versed with policies, protocols and organisation culture."

*"We have **invited applicants who are on the last stages of the selection process to observe our all-team Quarterly Meets. We generally do this for some Managerial or Leadership roles**, wherein we want to build investment into the organisation or check for culture fit."*

We do light engagement

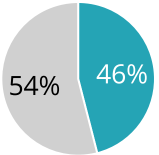
Field visits / virtual sessions with team: Some organize field visits, virtual sessions with hiring lead / line managers and sometimes potential reportees, to clear doubts and orient about the work ongoing in the organization.

We do deep engagement

Some plan **structured visits to the project locations**, especially if not a HQ-based role, to ensure expectation alignment. One even experimented with a week-long immersion for the top two contenders.

*"We ask candidates to **visit our project locations to give them a clear understanding** of where they will be placed. Managers provide a **brief orientation about the activities** at each site."*

*"We usually have a pre-joining meeting with the state specific team members in case of field roles. This is to ensure that we are transparent about the challenges and demands of the role locally and the candidate knows what they are signing up for. **We also experimented with a week-long immersion for the top two shortlisted candidates** to experience living and working in one of our tougher, remote geographies. That went well too – to connect them to the realities of our work on ground."*



Pre-joining materials: **Some organizations don't do this; when they do, they send helpful material to orient the new hire**

Not really/ Sometimes

A few say they don't prefer to do this. One calls out this as a privacy concern.

- *"Everything is shared on the day of joining."*
- *"No. We give access to the joining kits, booklets and policies materials only once the candidate gets onboarded keeping the privacy and confidentiality in mind."*

We send Basic Materials

Many organizations seem to send some basic materials. Some of them mentioned these in isolation, some mentioned them as a composite 'Welcome Kit'.

- The things they send could include:
  - **Policies:** Employee Handbook (most commonly)
  - **About the organization:** Reading materials, organization presentation. link to website, social media links, etc.
  - **Access credentials:** to their work account and any software used
  - **Details of plan:** Schedule for the induction period
  - **Contact details:** contact details of support team

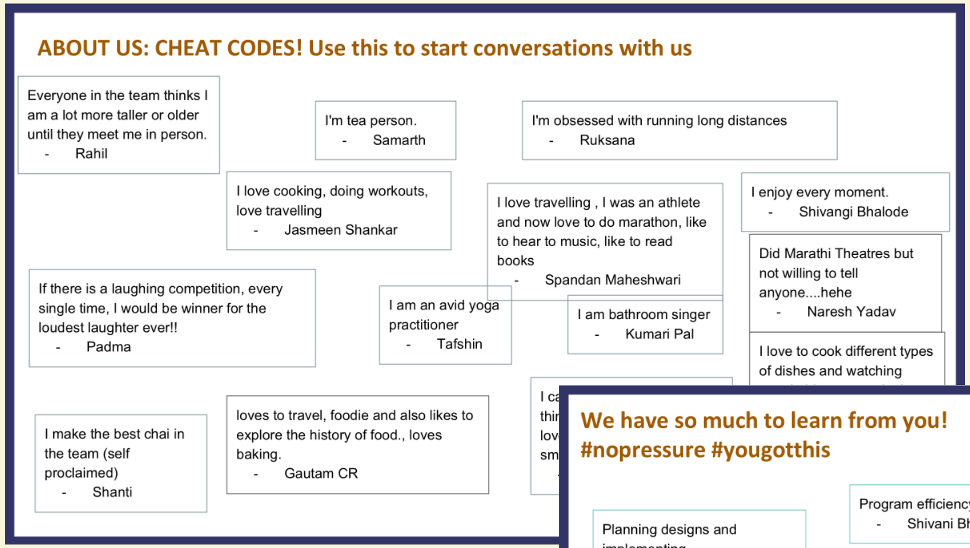
Pre- Events | **Pre- Materials** | BG Verification

Bonus!
Welcome Messages from Team and Icebreakers

Thank you to

FOUNDATION FOR MOTHER & CHILD HEALTH INDIA

for sharing the example!



ABOUT US: CHEAT CODES! Use this to start conversations with us

Everyone in the team thinks I am a lot more taller or older until they meet me in person.
- Rahil

I'm tea person.
- Samarth

I'm obsessed with running long distances
- Ruksana

I love cooking, doing workouts, love travelling
- Jasmeen Shankar

I love travelling , I was an athlete and now love to do marathon, like to hear to music, like to read books
- Spandan Maheshwari

I enjoy every moment.
- Shivangi Bhalode

Did Marathi Theatres but not willing to tell anyone....hehe
- Naresh Yadav

If there is a laughing competition, every single time, I would be winner for the loudest laughter ever!!
- Padma

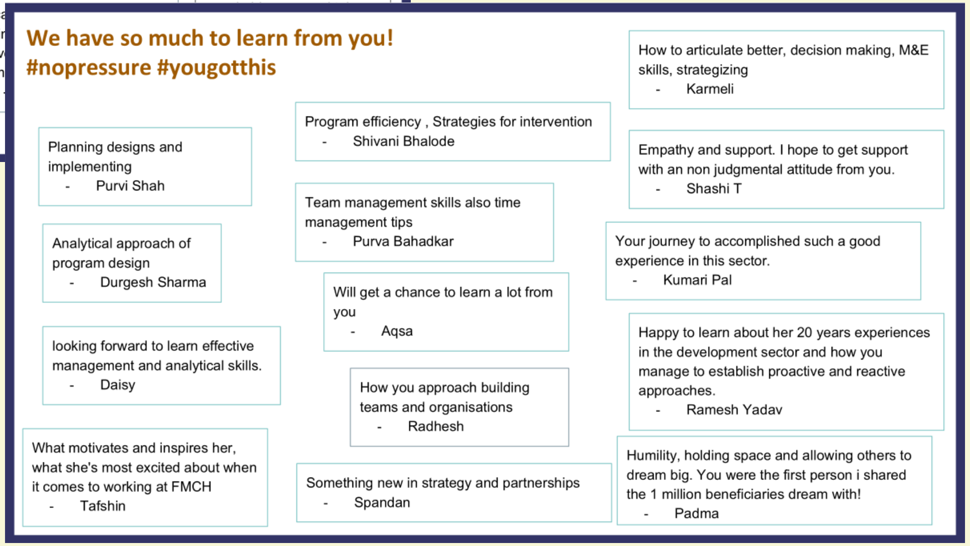
I am an avid yoga practitioner
- Tafshin

I am bathroom singer
- Kumari Pal

I love to cook different types of dishes and watching

I make the best chai in the team (self proclaimed)
- Shanti

loves to travel, foodie and also likes to explore the history of food., loves baking.
- Gautam CR



We have so much to learn from you! #nopressure #yougotthis

Planning designs and implementing
- Purvi Shah

Analytical approach of program design
- Durgesh Sharma

looking forward to learn effective management and analytical skills.
- Daisy

What motivates and inspires her, what she's most excited about when it comes to working at FMCH
- Tafshin

Program efficiency , Strategies for intervention
- Shivani Bhalode

Team management skills also time management tips
- Purva Bahadkar

Will get a chance to learn a lot from you
- Aqsa

How you approach building teams and organisations
- Radhesh

Something new in strategy and partnerships
- Spandan

How to articulate better, decision making, M&E skills, strategizing
- Karmeli

Empathy and support. I hope to get support with an non judgmental attitude from you.
- Shashi T

Your journey to accomplished such a good experience in this sector.
- Kumari Pal

Happy to learn about her 20 years experiences in the development sector and how you manage to establish proactive and reactive approaches.
- Ramesh Yadav

Humility, holding space and allowing others to dream big. You were the first person i shared the 1 million beneficiaries dream with!
- Padma

A really nice practice shared by a participant:

For new joiners, a short Google Slides is shared, with wishes from team members, some trivia written by them. Overall, what a warm way to welcome someone!

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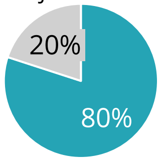

Background verification: **Most organizations do reference checks; in some cases, they do detailed background verification**

The Simple Version: Reference Checks

17 organizations (40%+) explained that what they do is reference checks. Everyone agrees its best to do this before joining – in fact, before rolling out the offer letter. Some trends:

- **How many?** Typically two reference checks, sometimes three.
- **Who with?** from previous colleagues / managers. In the case of freshers, with Professors/Department Heads. In one case, also with the HR of the previous organization.
- **What for?** Typical check is for ‘any flags (legal, value/culture based, strengths and areas of development)’
- **How?** It depends. For some, it is an email with questions. For some, it’s a detailed Google Form. Some prefer to do it by call. In one case, they also check documents – e.g. documentation from previous organizations. And one organization just did a ‘LinkedIn verification’. (Good reminder to update your LinkedIn Profile! ☺)

The Detailed Version: Background verification

6 organizations (~15%) shared that they do a deeper background verification. Some trends:

- **When?** One organization mentioned they do it after joining, now have moved it to ‘as soon as the offer letter is signed.’
- **How?** Two asks for a police clearance certificate, additional to the reference check.
  Please note that there are also third-party agencies that provide such a background verification service.

Bonus!
A sample of Reference check questions

Below are the list of question that a participating organization asks during reference check.

1. What was the **nature and length of your relationship** with the candidate?
2. What were **candidate's reasons for leaving** the job?
3. (a) Reasoning skills | (b) Decision making skills | (c) Analytical skills | (d) People management skills | (e) Interpersonal skills
4. (a) Leadership Style | (b) Ability to deal with Ambiguity | (c) Professionalism
5. What do you think are the candidate's **strengths**?
6. What are the candidate's **areas of improvement**?
7. Could you tell us of a time **when the candidate had to face adversity in his/her/their role**, and how did he/she/they overcome this?
8. The candidate has to work on (for example) curating and maintaining technology oriented solutions, disseminating knowledge products by interacting with a range of stakeholders. How would you **describe candidate's ability to handle this key responsibility** which would require intense analytical and problem solving skills? Where might he/she/they face a challenge?
9. Is the candidate **open to feedback**? How does he/she/they respond to the feedback?
10. Based on your experience with the candidate, **what motivates him/her/them**?
11. Is there **anything specific about the candidate** that we should know from your point of view?

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Contents

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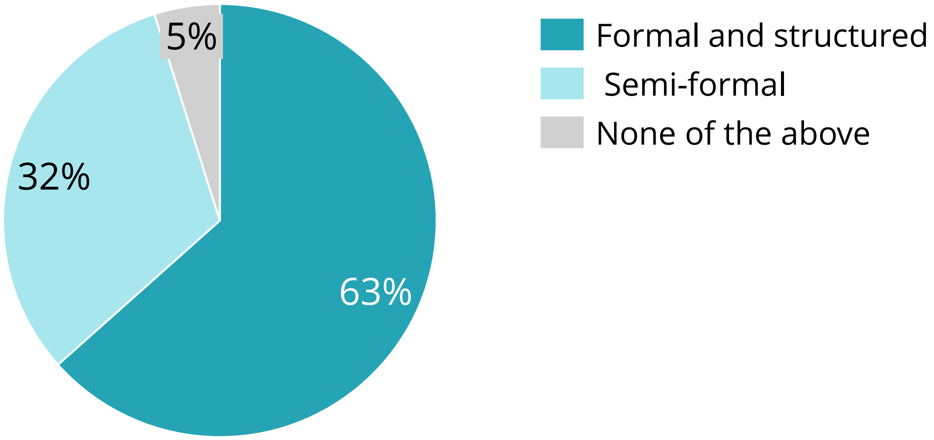
Induction Mechanics: **Formality and Group Size**

How formal is the induction?

Percent of respondents' answers, n=41

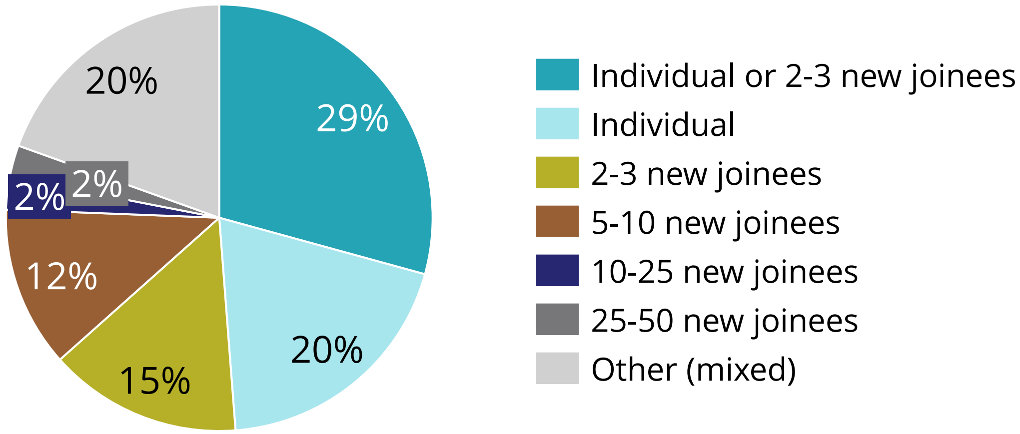
A majority (26 organizations, 63%) have a formal and structured induction, while almost all the others (13 organizations, 32%) have a semi-formal induction.



What is the typical group size?

Percent of respondents' answers, , n=41

A majority (~65%) of the participants indicated that the **group size for induction is typically 1-3 new joinees**.



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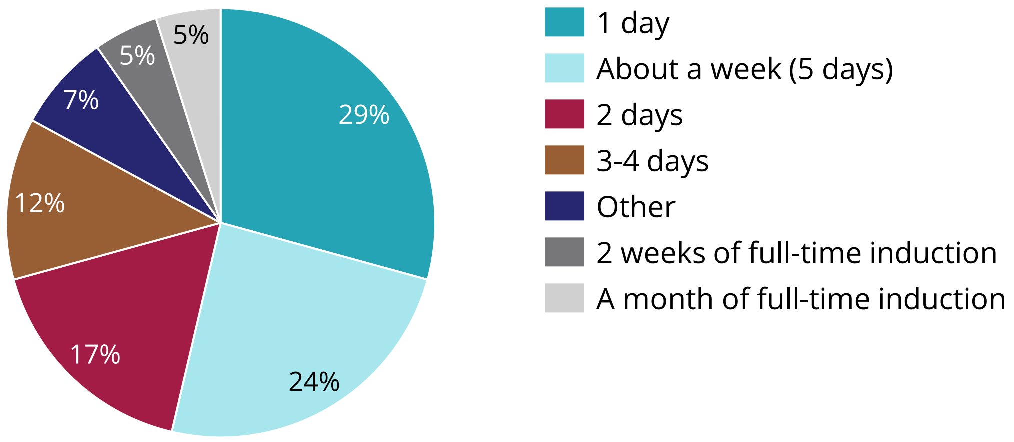
Induction Mechanics: **Length and Frequency**

How long is the induction?

Percent of respondents' answers, n=41

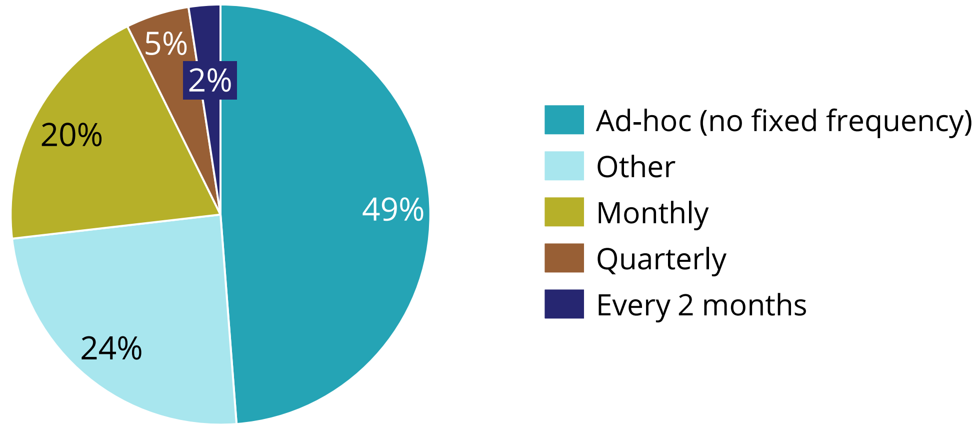
The duration typically varies **between a day and a week-long induction** – most commonly, a day-long (29%) or a week-long (24%)



How often do you conduct the Induction program?

Percent of respondents' answers, n=41

50% of the participants indicate that the **inductions are done in an ad-hoc manner**,. This is understandable given the hiring patterns also vary over the year.

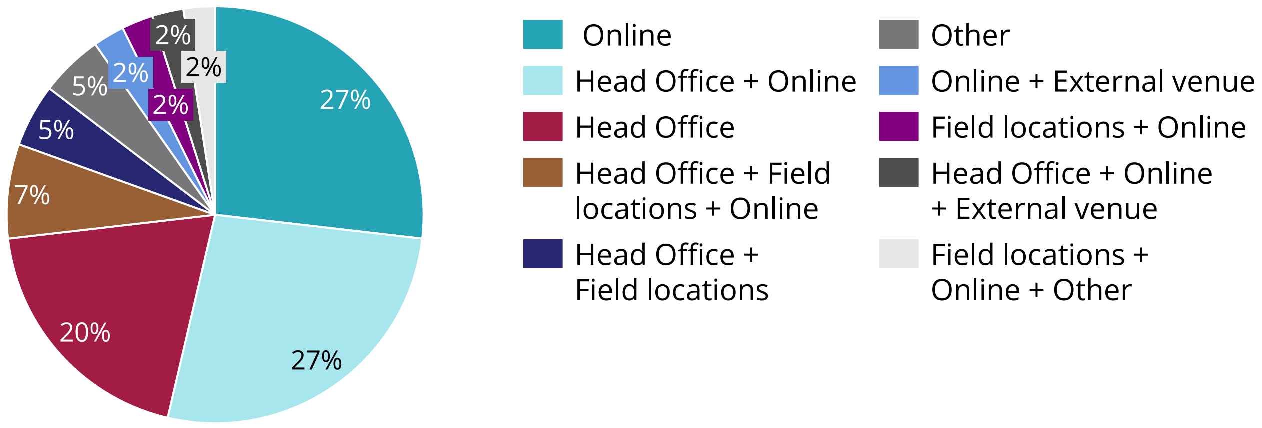


Induction Mechanics: **Location/Medium and Methods**

Where is the induction conducted?

Percent of respondents' answers, n=41

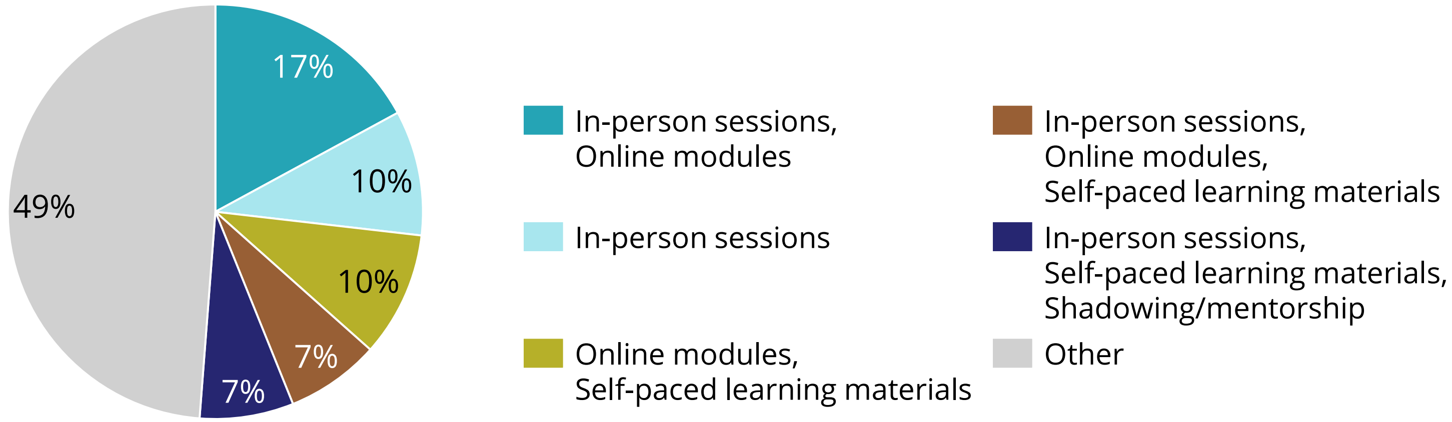
The most common methods are to do it virtually (27%)**, in the Head office (20%)** or as a hybrid of the two (27%).



What are the methods of delivery?

Percent of respondents' answers, n=41

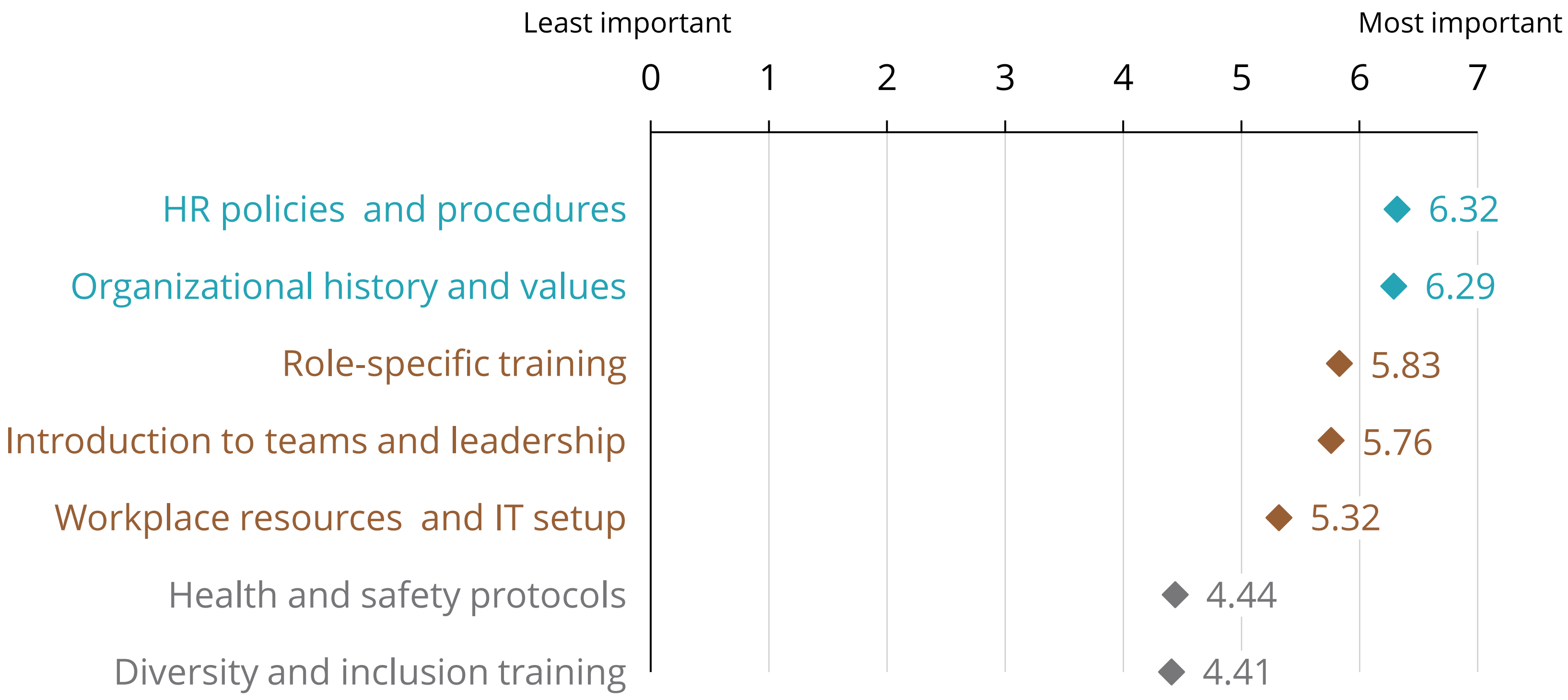
A mix of methods are mentioned; most commonly it is in-person session and/or online modules that are planned.



Induction Content: **What content do you focus on?**

Content focus for Induction

Average importance indicated by organizations for the topics listed (7-point scale)



Key Highlights

- Maximum focus is for **HR policies and procedures**, followed by **organization history and values**.
- Least focus is given to **Diversity & Inclusion trainings**, even below Health and safety protocols

A thought: Should we not give a little bit more importance to Diversity & Inclusion, and what it means in our particular context?

Orientation: **Is there a broader orientation after the induction? Tell us more.**

Yes, in some way.

Some organizations mention a 3-4 week, or 3 month ongoing training for their teams. Some others mention planned check-ins with the team members

- *Yes, we do take about **4 - 6 months to train the field team**. We don't have formal events for the same but do try and schedule meetings.*
- *This longer orientation includes **detailed introductions** to our projects, tools, and workflows, as well as **in-depth discussions on roles and responsibilities** which is done by the respective team. The new hire also participates in team meetings and monthly all hands meeting with the extended team members. The buddy system continues for 2 months, ensuring ongoing support and guidance as they adjust to their new environment. This approach helps the new hire gain a comprehensive understanding of our operations and team dynamics.*

Driven by Department

Many organizations put the responsibility of role-specific, continued integration of the hire on the department. Some mention they explicitly align with the manager / department on the new hire's 100-day plan.

- *The respective team plans their own onboarding process. Usually the Knowledge Transfer process based on the role.*
- *The Orientation runs parallelly with the Induction spaces. The basic structure is to build role and function clarity, understand functional interdependencies. The first week is planned in detail by the Reporting Manager. The next 3 weeks are planned in partnership with the new team member, based on how they learn and what they think they need to learn*
- *While we don't have a formal session after induction, we do hold **a meeting with the Manager to discuss the new joinee's 100-day plan**. This ensures that the goals and expectations are clearly aligned right from the start.*

Observations

A couple of organizations emphasized observations and job shadowing as a way for the new hire to learn.

- *Since we are a child centric organisation, we necessitate that the new joinee undergo the school observation and adult sessions.*
- *Yes, the new person has to shadow/observe/talk to all dept leads/members to understand how their day looks like and what are their roles in the org.*

Nope!

Four organizations said they don't have any sort of broader orientation after the induction.

Bonus!
Sample Induction Plan

Time	**Topics**	**Objective**	**Facilitator**	**Link**
9:30-10:00 am				
10:00-10:30 am	**Shadow call with Angie**	Shadow - to know the status of <Project 1> Setting intention of the induction	CEO	Invite sent
10:30-11:00 am				
11:00-11:30 am	**Field observation**	Understand the "theory" of the direct model To see <App> in action. Pls focus on: 1) How the app is being used for counselling 2) Speak to Shivani/the associate on how they use data - understand dashboard for monitoring and reporting to donors	Shivani	*Protip:* 0) Go over the ToC before to understand this better. 1) Understand the dashboard from a user perspective 2) Specifically ask - what do you do with this data point when it is shown 3) Understand the difference between data for monitoring and data for reporting 4) Understand the data driven pieces of the intervention
11:30 am-12:00 pm				
12:00-12:30 pm				
12:30-1:00 pm				
1:00-2:00 pm				
2:00-2:30 pm	***LUNCH + INFORMAL TIME WITH THE TEAM - Head home if possible to take the rest of the calls***			
2:30-3:00 pm				
3:00-3:30 pm	**Shadow call with Varun**	Understand the ops of tech pieces	CEO	
3:30-4:00 pm	**Meeting with Varun**	Ravi will have insight on: 1) <App> - its evolution, the future, backend, data and dashboards 2) <App> Plus - Why it was thought of, how we are thinking of its future etc	Varun	*Protip*: 1) Take copious notes in this call - the field visit and this will come together as tech in action. 2) Have a section on what all needs to be improved in <App> - it will help in building product roadmap
4:00-4:30 pm				
4:30-5:00 pm				
5:00-5:30 pm				
5:30-6:00 pm	**Self work**	Play around with <App>, the dashboard, view the backend etc	Self work	

Thank you to

FOUNDATION FOR MOTHER & CHILD HEALTH INDIA

for sharing the example!

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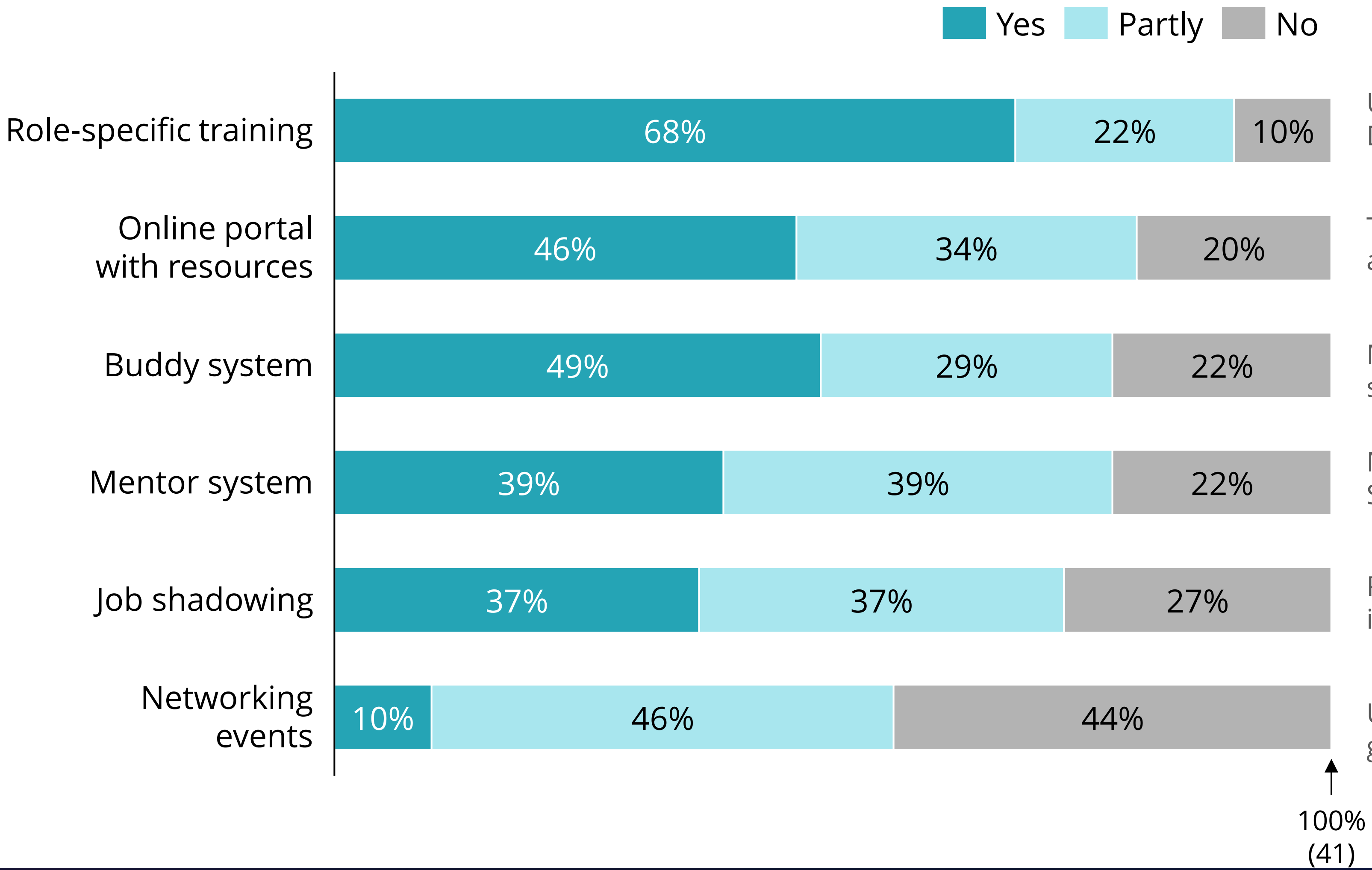
RAAHI:IMPACT
WITH GIRISH ANANTH

Overview of Support Structures



Role-specific training: Usually considered the Managers / Department's responsibility

Online portal with resources: Typically videos/PPTs on drive. Some also use Learning Mgmt Systems.

Buddy system: Many have selection criteria for buddy; some consider HR/manager as buddy

Mentor system: Mainly seen as support from a manager. Some good practices seen.

Job shadowing: Part of role-specific training; bottleneck is bandwidth of new hire

Networking events: Usually not done; org events seen as good-enough proxies

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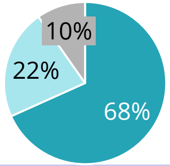

Role-specific Induction: **This happens in some cases; is usually considered the Department's/manager's responsibility**

Highlights

- Largely, the participants believe it is the **respective teams'/Department's responsibility** to do the role-specific induction.
- Some also consider **'On-the-job training'** as the role-specific training.
- In some cases, **it is split as Program and HQ roles**; in some cases, it is provided for **specific roles** (e.g. teacher, therapist).

Selected Quotes

- All teams are committed to providing comprehensive role-specific training for new hires. This training is facilitated through a **combination of a buddy system, knowledge transfer, and project-based learning**, ensuring that employees receive practical, on-the-job training tailored to their roles.
- **Manager supports** with the needs and expectations of the role on the field and through check-ins.
- Yes, this is **planned by the reporting Manager**. We don't do anything centrally here for our Management. **For our field staff we do have a central training.**
- It is conducted by specific team to ensure that the new Joinee understand the processes and system easily. It may include various knowledge transfer sessions.
- Yes, **therapists and trainers** receive on-the-job training before they are permitted to work directly with children and families for therapy or to conduct training sessions
- Available **for School based roles**

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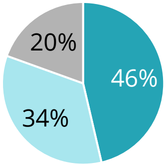
SUPPORT STRUCTURES



Role-specific | **Portal** | Buddy | Mentor | Shadowing | N/w events

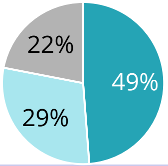
Online Portal with Resources: **In basic form, it's PPTs/videos on a drive. There are some examples of deeper interventions.**

Highlights

- This seems to be **mostly ad-hoc.**
- They are **typically in the form of PPTs/videos** loaded on a Drive, and/or to a HR Management System.
- Some of the **structured approaches laid out** include Google Classroom, Keka Learn, an internal site/server.

Selected Quotes

- **We maintain resources on a Google Classroom**. We have our welcome kit that directs them to spend must-read resources. We also have developed courses on our platform for new joinees to understand our work better.
- We have… **recently implemented Keka Learn**, a system that provides access to a comprehensive range of digital resources. This platform allows learners to engage with content in various formats, incorporating gamification elements such as quizzes and interactive features to enhance engagement and make the learning experience more dynamic.
- We have an **internal org orientation site** that houses resources and instructions through the orientation. We also have an internal wiki that houses all policies, handbooks, resources etc. in the org.
- **We use a common server that provides centralized access to all important documents, policies, guidelines, and other resources.** As part of our onboarding process, new hires are granted access to this server during their induction. This server is a critical tool for employees to stay informed and have easy access to the resources they need for their roles. The server is regularly updated, ensuring that the team always has access to the most current information and materials.
- **All materials available in HRMS portal** and the employee will be given access to the same on day 1.



Buddy System: **Many do it, but the question remains: How well do they really manage to do it?**

Highlights

- **Half the organizations indicate they have a buddy system**, and another quarter indicate they have this partly. Many orgs indicate detail behind – e.g. having clear selection criteria for the buddy.
- In some cases, the organization **assume the reporting manager or the HR will be the default go-to buddy** for the new hire.

Selected Quotes

"We do it well"

- We have a **clearly defined employee buddy program** with **established guidelines and expectations** for both the buddy and the new employee. To encourage stronger connections, we allocate a **reimbursable amount for a buddy lunch**.
- A buddy is from **cross department, who has been in the org for 2 years or more**. Guiding the new person in their probation
- We normally and **informally assign someone** to from the same role to be present and support the new employee.

HR is buddy

- HR buddy is assigned
- HR is the "buddy" by default

"The Manager is the Buddy"

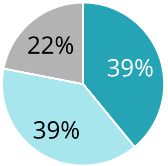
- While this is not a primary onboarding practice, **the concepts are utilized by managers to guide new joiners through their roles**.
- We don't have a formal system, but we do **assign a buddy in some cases** to help in gelling with the org culture & work environment.
- In most cases, the new employee engages very closely with the **reporting manager**.

I'm not sure if Manager / HR are 'good enough' as buddy systems.

Please note that in the best practices shared by others, the buddy system was the most frequently mentioned practice. Do consider implementing it and well in your organizations!

"It's hard to do ☹"

- We tried the Buddy system for a year, but **it did not work out for us**
- We have started this year, but not in full swing yet.



Mentoring: **A majority claim to have some form of mentoring, but it seems to often be a *de facto* expectation that the manager/supervisor would be the mentor**

Highlights

- While a majority (~75%) have indicated they provide some form of mentoring, it seems to mainly be as **support from the manager of the new hire**.
- Some good ideas shared by participants include **tagging a specific leadership team member** to each employee for mentor in the initial stages; **assigning sector leaders** to some team members as mentors.

Selected Quotes

Yes

- Yes, a new employee is directly supported by their reporting manager **and a member from the leadership team is also allocated with the new person to mentor them in the initial stages**

Supervisor = Mentor

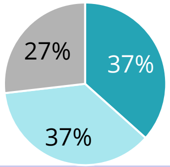
- **Supervisor** partly acts as a mentor to the new joinee for understanding of the project.
- We frequently **prepare managers to serve as mentors**, providing new employees with valuable opportunities for learning and growth
- We have just initiated **assigning a supervisor** for each new employee who can **help them understand their role and expectations** better.
- Supervisor also acts as a mentor for new joinee
- Reporting manager plays the mentor role along with HR and Buddy

Sometimes

- When required
- We have got some **influential and sectoral leaders** to mentor the team.
- For Teaching & School based roles
- Is not done aggressively - it's need based
- Wherever required, opportunities for cross functional learning available

Nope!

- There is no separate Mentor system
- No formal process



Job Shadowing: **This seems to be done in some cases; the difficulty to do it seems to be one of bandwidth**

Highlights

- **Many do it consciously**, as part of the role-specific training. The main question seems to be **one of bandwidth to do** it – and the tension of needing the employee to be productive ASAP.
- Some organizations believe it is **enough for them to see their supervisor at work.**

Selected Quotes

Yes, consciously done

- This is incorporated in the role specific training, where the team member gets to shadow many calls (intra and inter function)
- As with the buddy system we assign someone from the same job role, we ask them to shadow their buddy especially for their field work.
- Shadowing helps a lot in growing employee morale considering they start from scratch

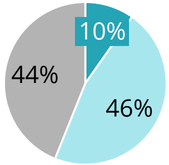
When it happens…

- Someone who gets an opportunity to work with the supervisor at same location can have an experience of job shadowing.
- While this is not a primary onboarding practice, the concepts are utilized by managers to guide new joiners through their roles effectively.
- Wherever possible
- It's always there for few days and then the new joiners can reach out to seniors if required
- For specific roles, especially leadership and senior positions
- Wherever required, opportunities for cross functional learning available

Nope!

- No formal process
- Not encouraged
- Varies depending on the team and role

SUPPORT STRUCTURES



Networking Events: **Very few organizations truly plan networking events for new joinees; others use proxies like townhalls for the same**

Highlights

- **There are only a few organizations** (4, i.e. ~10%) that create networking events for their new hires;, e.g. playdates, workshops.
- Many use the organization events as a proxy, and some expect the networking to be led by the new hire.

Selected Quotes

Organized by office

- Yes, employees are provided with opportunities to **participate in networking events and workshops**, allowing them to learn from industry leaders. Those involved in the some program (e.g. corporate volunteering/fundraising) frequently engage in these events, gaining valuable insights and experiences
- When we have many joiners we may **conduct playdates or workshops** where ppl can interact
- **Trainings / meets / job fairs** are the events wherein new joinee can get to know other team members
- We have spaces created for employees to engage and connect with each other that **happens on an ad-hoc basis**. It is directly part of the onboarding process

Office events as proxy

- We don't have a dedicated networking event for the purpose of induction. However, **our Quarterly Meetings act as that space** of networking and getting to know the entire team in person
- As a part of monthly employee gathering

Team-led

- Team drives.

New hire-led

- We **encourage people to visit field/ review meetings** to understand more
- We do **ask new joinee to connect with the team** members through online meeting or in person meeting at office.

Contents

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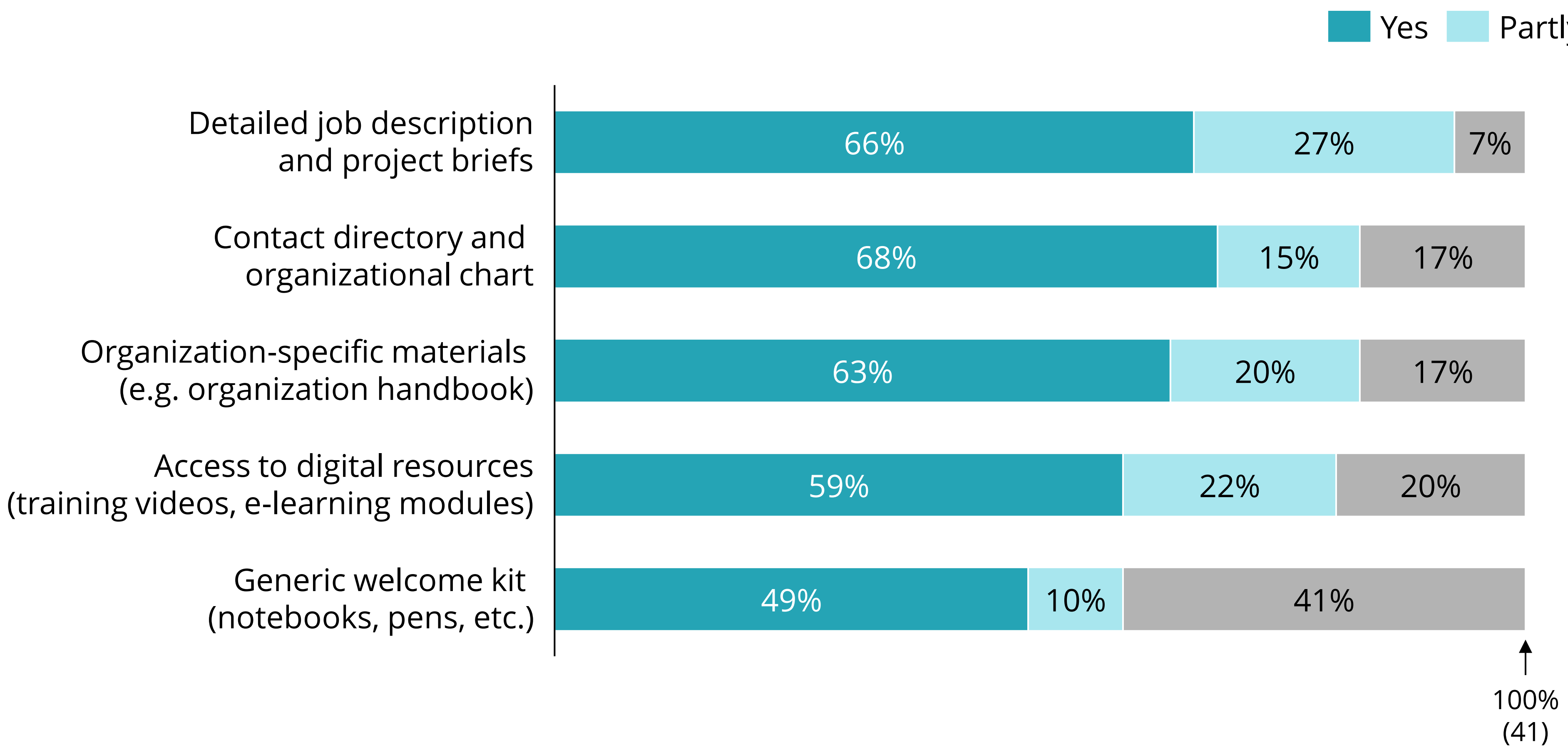
Overview: Take-homes from Induction



Mostly given with offer letter. Sometimes also has KRAs.

Usually shared online/as a PPT

Usually policies, annual report, etc. in soft copy

Usually a resource bank; some have a Learning Mgmt. System

IT material, stationery, welcome note, etc.

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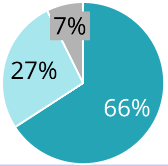


Job Description: **Usually given along with the offer letter, sometimes also with KRAs**

Highlights

- Most organizations work with a Job Description that is part of the offer/appointment letter. Some oganizations also have KRAs that are shared to the new hire, along with the JD.

Selected Quotes

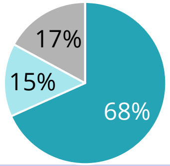
Yes, usually while giving offer letter

- We take great care to align candidates with the job description during the pre-joining or interview phase. We ensure that the candidate's fit for the role is thoroughly assessed and communicated before making a placement. Project briefs are conducted regularly to familiarize them with the tasks they will undertake.
- Job Description is shared with new joinee and explained in detail by Supervisor before joining /immediately after joining along with KRAs
- JD provided as part of their offer letter, and later project briefs are shared by their program teams
- We provide all in our HRMS system
- Shared by the Reporting Manager as part of the orientation
- Our job description is fairly detailed and we share PA KRAs with them as well when they join.
- Included in the appointment letter
- Job Descriptions are provided during the recruitment process. During onboarding, the expectations are set and details of the projects are shared, but not in a very structured or formal manner

Nope!

- Separate JD is not available, but KRAs are. Project reports are available to understand the journey of the project

MATERIALS PROVIDED



Contact Directory and Org chart: **Usually available in some online location, or shared in a PPT form**

Highlights

- Many organizations direct new hires to find the organization chart and relevant contacts **on the HRMS, or share a soft copy** (e.g. PPT) with them.
- One organization indicated that the org chart **is shown and discussed during the induction**, though not shared.

Selected Quotes

Find it on HRMS

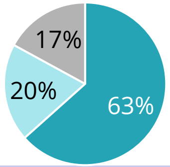
- Org Chart is explained and contact directory is available on HRMS
- Yes, our HR software serves as a comprehensive contact directory for employees. During HR orientation, we provide a detailed walkthrough on how to access and utilize the information available on the portal including the org chart.
- We provide all in our HRMS system
- Available on HRMS

Shared in PPT form

- Soft copy on HRMS platform and HR handbook
- Presentation Format
- Part of the welcome kit.
- This is provided during the onboarding process as a document along with providing them access to the organisations HR portal and added to all groups and communication channels

Nope!

- We take the team over the org chart and structure, but the team does not have access to a contact directory yet. We plan an getting an HRMS this year, and will hopefully be able to change this by the end of the year
- This is provided if the new joinee requires it



Org-specific materials: **Usually provided virtually on a platform; contains annual reports, policies, etc.**

Highlights

- Many organizations do this **virtually** or direct the new hires to a **website/HRMS system** for soft copies.
- The typical documents include –documents covering the org journey, **annual report, org policies** / employee handbook

Selected Quotes

Website/ Soft copies

- All the policies along with SOP's are shared in soft copies for reference in future
- We provide all in our HRMS system
- This is uploaded on our org orientation site and internal wiki - also separately shared post the governance orientation
- Available to employee through Employee Website.
- Share all the PPTs of the Programs

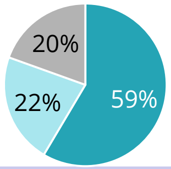
Org overview materials

- Annual report in case someone needs to refer, this is role specific
- A book that covers journey of organisation since its inception
- We share our organisationsal policies and employee handbook with them as soon as they join.
- Organization Policy, and Culture & Ethos Document
- Policies and Employee handbook

Other things

Org diary, t-shirt, org stickers, org pen, badgets, welcome letter

MATERIALS PROVIDED



Digital Resources: **Usually a resource bank is provided; in some cases, there are Learning Management Systems**

Highlights

- Some organizations have a **Learning Management System** set up (e.g. Keka Learn, Abhyaas.org) for curated courses new hires are expected to go through.
- Many mention providing **resource banks** in the form of PPT/ Videos / YouTube links on a website/Google Drive / Google Classroom.

Selected Quotes

Learning Mgmt. System

- We have recently introduced a new initiative as part of our learning and development efforts. We have implemented Keka Learn, a system that provides access to a comprehensive range of digital resources. This platform allows learners to engage with content in various formats, incorporating gamification elements such as quizzes and interactive features to enhance engagement and make the learning experience more dynamic.
- We also have developed courses on our platform Abhyaas.org for new joinees to understand our work better.

Resource Bank

- Induction videos, **session recordings**, journals, articles and research papers
- We share our **resource bank** with them in a **phased manner** to build their knowledge and understanding as their work on field intensifies.
- **PPTs / Videos / YouTube links** are shared with new joinees
- There are **no specific training videos** that are induction specific, Whatever resources we have are housed on **the internal wiki** which is shared with new joinees
- A **Google Drive** with details is available.
- We provide all in our **HRMS system**
- We maintain resources on a **Google Classroom**. We have our welcome kit that directs them to spend must-read resources.

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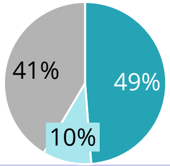
MATERIALS PROVIDED



Welcome Kit: **This can range from basic IT materials to personalized gifts**

Highlights

- A majority of the organizations (~60%) **give some form of a welcome kit**.
- This may range from just **IT stuff**, and a **basic welcome kit** including stationery (notebook/diary/notepad and pen). Beyond basics, this could also include bag, organization T-shirt, ID card, Business card – along with a **welcome note**.

Selected Quotes

Just IT stuff

- Only Laptop/Charger are allotted on joining, ID card and visiting card are allotted within few months of joining
- Laptop or Tablet or iPad or nothing based on the role

Basic Welcome Kit

- Notebook, pen and laptop
- Diary, Stationery, Key chain, and Bottle.
- Bag, notepad, pen and a mug
- Diary, Pen, ID card
- Bag, Diary, Welcome Note
- Stationery kit, juice,
- We provides Diary, handbook, etc.
- Notebook, pen, water bottle, Org T-Shirt, ID Card, Business Card.

A novel idea

- Instead of a traditional welcome kit, **we send a personalized treat**, such as their favorite food or desserts, as a gesture of appreciation for their arrival and contribution to the organization. Additionally, we provide t-shirts and other resources at various points throughout their initial days of employment.

Virtual welcome kit

- We have **created a link to a welcome kit** that details our ways of working and information to get started for someone who is about to join us. We usually send it a day prior to their first working day.
- Share an online onboarding kit

Contents

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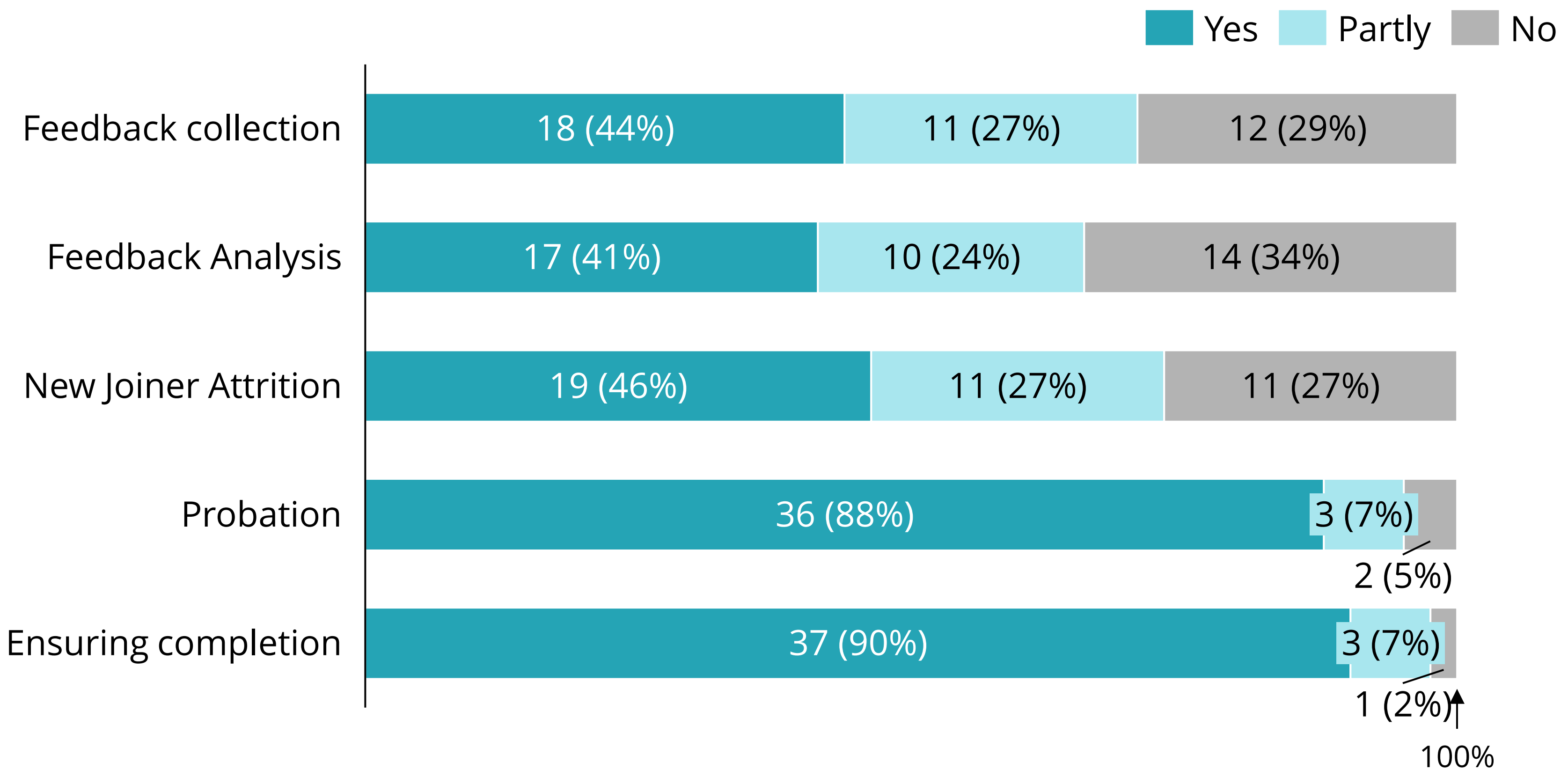
Overview: Impact Tracking



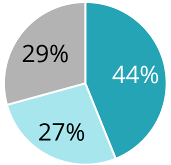
Usually done in some form – e.g. feedback form + regular check-ins

Usually done by HR team; to revise future cycles of induction

Periodically analysed every few months

Usually 6 or 3 months long, extended basis performance.

Usually integrated into the process itself e.g. calendar invites, formal handover



Feedback collection: **Done in some form by most organizations – usually a quiz/survey along with informal check-ins**

Highlights

- ~70% of organizations (29) indicate doing some type of feedback tracking.
- The most typical approach seems to be a **feedback form**, along with **informal feedback / regular check-ins** with the new hire. Identifying effective ways of feedback gathering and analysis has been called out as a challenge for organizations, though.

Selected Quotes

Yes, we do a form / quiz / survey

- Yes, following each batch of new joiners' induction, **we share a feedback form**. This form requests ratings on various aspects of their experience, including overall satisfaction, induction duration, facilitator quality, and clarity of information. Additionally, we invite them to provide detailed feedback on their experiences and suggest areas for improvement.
- Through **a google feedback form**. We also try to **catch up with members informally** to know about their experience
- By the end of day 2, employee will take a short quiz which helps the HR team understand the success rate. It also includes a feedback form which helps us improve the process.
- We collect feedback in the form of **onboarding survey**.

Informal Check-ins

- Informal check-in with new joinee and line managers are done at regular intervals in the **initial 3 months**
- We do a new join **review in the first week of joining, followed by one-on-ones** at pre-determined intervals to help the new employee to settle in and address issues, if any.
- We conduct **interviews at the end of the probation period** and at various monthly checkpoints to understand how they are doing in the role and org.
- In most cases, this is done as a reflection with the reporting manager to check if the employee feels supported. There is **not structured process around this.**

We would like to, but No ☹

- We intend to setup a system, but we don't have a dedicated HR to look into it. Most of the time, Our operational team is the one who gets this done.

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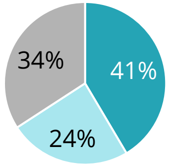


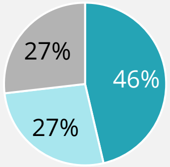
Feedback analysis: **Usually done by HR teams, used to revise future inductions**

Highlights

- Largely, the feedback is seen by HR team, along with the organization leadership. The feedback is **used to revise the induction** and improve the orientation. (However, the feedback provided is not specific and clear; it seems likely that this is quite limited as a focus area.)

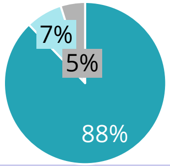
Selected Quotes

- The HR team **carefully reviews the feedback forms and analyzes the average ratings for each factor** across different batches. We consider all areas identified for improvement and implement necessary changes to continuously enhance the overall experience for future new joiners.
- The HR team looks at the data and **plans out the next set of orientation with that insight**
- Based on the feedback, the **reporting manager is provided inputs as also to other team leads**. This is to help resolve and close any gaps.
- Yes, feedback is collected and reviewed by Talent Management. When the feedback requires attention from management or specific teams, **Talent Management escalates it to the relevant individuals and collaborates** on a plan of action.
- We analyze it every quarter to see what to enhance and strengthen. "We" includes the People Practices (HR) team.
- We receive qualitative feedback. We **look at it on a case to case basis and make adjustments to the onboarding plan**. This is looked at by the leads of every team and the HR team.
- HR team, **process has been enhanced based on the feedback**. Eg: interactive sessions increased based on a feedback.



A note on Attrition Analysis

- This is said to be done by ~**75% of organizations** (30 organizations) in some form.
- This is done **monthly / every 2-3 months / 6 months**, depending on the organization. In one case, given the hiring is quite limited, it is yearly.



Probation Period: **Usually 6 months or 3 months long, extendable by performance and sometimes varying by role**

Highlights

- 14 of them (33%) mention it as **6 months long**, and another 25% indicate it as **about 3 months of probation.**
- The probation period is sometimes **differentiated by role**, and **extended basis performance**.

Selected Quotes

Probation period

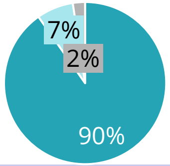
- *~15 organizations mentioned 6 months in comments, and 10 organizations mentioned 3 months*

Differentiated by role

- Probation period – for Managers and above – 6 months | Probation period – for all others – 3 months (Irrespective of level) The general probation is for 3 months. For some Leadership roles we've also done a 6 month probation
- 3 months; 6 months for leadership
- 3 Months to 6 Months. Depending on Requirements.
- Our probation period for field employees is 4 months and for senior management is 6 months
- 3 months for therapists/doctors, 6 months for shared service (HR, Finance, IT, etc)
- Between 1 to 6 months depending on the contract type
- It depends from role to role and basis the skill and experience of the person we recruit. If we enforce a probation, it is between 3-6 months

About extension

- 6 months, extended based on performance feedback at the end of this period.
- Probation extension, only in exceptional situations, will be permitted for a maximum period of 3 months (at the discretion of the team leadership it can be extended by 1 / 2 / 3 months)



Tracking Completion: **Usually in-built into the process, and/or HR maintains a tracker**

Highlights

- In many cases, the ensuring of completion is **integrated into the process itself** (e.g. calendar invites, a formal handover, making it a KRA, have a check-in scheduled at the end of the first month, etc.)
- Many keep **a checklist or tracker** for ensuring completion too.

Selected Quotes

It's built into the process

- Benchmarked tasks are assigned to HR buddy and reporting manager on the HRMS platform. **Probation confirmation depends on completion of these tasks as one of the probation KRAs for the employee is completion of Induction docket**
- **New joiners are assigned to their respective teams only after completing the main orientation session**. Department-specific orientations are scheduled based on the availability of department point-of-contacts and the new joiners' schedules, but we ensure these sessions are conducted within the first couple of months of their tenure.
- **HR team does a formal handover to the respective teams** after completing induction. And does a one-on-one check in monthly once with new joinees for first 3 months.\
- **Calendar invites** are shared.
- Yes, Talent Management performs a check-in with the new hire after one month to ensure they have completed their induction and orientation. Additionally, this is reviewed **as part of the probation review process** at the end of the third month.

We use a tracker

- There is a tracker for the same
- Our HRMS system
- Online Tracking System in Work Dashboard
- We have a check list for new joiners pre and post induction
- Tracker. Trying to improve this process by taking a survey post 2-3 months of joining.

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Challenges Set 1: **Recruitment Issues**

Finding talent and culture fit

- Trainee/employee not adhering to the organisation values. **Finding a correct employee is difficult.**
- Getting the team to **imbibe the culture as soon as possible**,
- Finding right fit for role

Follow-up with candidates

- 1. **Multiple follow-ups are required** for reference checks and background verification.
  2. Sometimes, we **faced a lot of issues while collecting the documents**.
- Getting **acknowledgment and acceptance on documents** such as Appointment Letter, Employee Handbook.

Candidates backing out

- **Bridging the gap between signing and the start date** The gap between contract signings and start dates can be alarmingly wide in some countries... Unfortunately, a lot can happen during this time, from cultivating a lack of confidence in the company among new hires to new hires seeking out other roles altogether.
- Candidates **back out on the day they were supposed to join.**

Challenges Set 2: **Bandwidth**

Availability of Staff

- We can't have extra manpower and need new joinees to be on job immediately so **having the specific members to organize induction is difficult at times**. Also if we organize it and **people have to cancel the induction due to urgent work**, there is a financial loss as well to the organization and induction gets delayed.
- We have very **few people joining together** - so either the online sessions become too frequent - leading to **cribs by presenters about repetition OR attendance is less** as the new hires would already have been pulled to their work.
- Getting **maximum involvement from internal stakeholders** (other than HR), so that the mid-year joinees have much more holistic & interactive induction experience

HR Team Bandwidth

- **Giving sufficient attention** to the new joinee
- Creating a holistic and comprehensive induction plan in **the absence of HR dedicated personnel.**
- **Individual joining dates make it tough** for us to organise group sessions which means for the sessions there is a lot of 1-1 time that is going in

Leadership Bandwidth and Priority

- **Unavailability of Senior Program Leaders** for the New Joiner Induction
- Leadership time for vision, history sessions
- Getting the leadership team to see the value of a structured induction process.

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Challenges Set 3: **Induction Operations**

Structured Process

- **Not having a structured process** - As we have been a small team, it was easy for us to manage this. Now that we are growing, it is becoming difficult to do this on a case to case basis and we feel the need of certain things to be standard.
- **We do not have a systematic framework** that can be used across all levels of roles and locations

Induction Operations

- **Time Constraints:** Coordinating schedules to bring together all relevant department POCs during the orientation period is a significant challenge.
- **Schedules don't match** of relevant team members.
- Given that we have multiple schools spread across different locations, and operating at different time-slots, **getting the new joinees from School to participate in the day long induction** (mid-year joinees), at a common time and date is sometimes challenging.

Other operational issues

- Onboarding them on **multiple platforms** we use in the organization.

Challenges Set 4: **Induction Session Design**

Information Overload

- With so much paperwork for new hires to complete before formally beginning, it's no wonder that information overload is one of the top contributors to a poor onboarding experience.
- **Lot of information for a new person to process**. How much information is too much or too less?
- **Working remotely, it's been challenging to build a sense of excitement** in the process from the beginning. Oftentimes the information tends to create an overload for new joinees who feel that there is a lot of reading, learning and attending meetings to do in the first week itself.

Tailoring induction

- We have hired for different roles and building the induction with nuance for this has been a challenge.
- Our current orientation process is not tailored to specific roles. It’s the same for all levels of employees, which means it may not address the unique needs and expectations of different positions. This is an area that needs to be re-evaluated to ensure a more effective onboarding experience.

Session quality

- Making the induction process clear and engaging.
- Time management
- Lengthy Orientation Phase: Employees often find the orientation process time-consuming, requiring considerable attention and effort. The challenge lies in delivering impactful and comprehensive learning within a limited time frame.
- During virtual inductions, keeping the new joinees engaged for a day long session, quite be challenging, at times
- Those responsible to give induction are busy and could do a rushed, non-qualitative induction; **Maintaining the same quality standard** of induction is difficult.

Looking to design more engaging and effective sessions?

Check out this this 10-minute video on “Raahi: Impact Journeys”, which has five engagement techniques inspired by the world's best teachers and trainers.

Challenges Set 5: **Tracking and New Hire Engagement**

Tracking and Technology Gaps

- **Missing progress tracking:** It can be difficult to measure progress if you don't have a structured plan for measuring it. This is where a detailed progress tracking plan comes in. Without it, you may miss critical opportunities to improve certain aspects of your virtual onboarding process (and see what is working as well).
- **Lack of Tracking System:** The absence of an effective tracking system makes it difficult to effectively manage and conclude orientation journeys.
- **Lack of technology:** most of our processes are manual so there are chances or error/ lapse
- **All onboarding processes are tracked manually** right now, which can give way to missing out on things from both HR and employee end. We're hoping with the HRMS, we can solve for some of the problems
- **Centralized and seamless documentation** has been a challenge. We have recently transitioned to using the onboarding process on our HRMS but there are still challenges with limitation in ability to customize the process.

Participant Engagement

- **Follow-ups are needed** from HR to receive feedback forms on time
- **To see higher engagement** on the experiences curated and recommended to get a stronger understanding of the ground and to interact with other team members
- Employees not reading through important documents
- Helping new hires understand its importance.
- **Maintaining continuous engagement and communication** with new hires who work in remote work environments.
- Ensuring the new joinees not only get access to policies/information but actually read and understand it has been a challenge. **A mechanism to measure that is missing** which leads to not being able to document the output of the information shared in the onboarding

Challenges Set 6: **Ensuring the induction is truly successful**

Ensuring Integration

- Onboarding at a mid level is challenging as the **existing team does not take the new joinee** as Leader fit immediately.
- **Integration of new hires into the organizational culture:** Helping new employees adapt and integrate into the organizational culture while imbibing the organization's values and practices. This is a challenge for those who come from corporate or organised environment as our work in social space involves ambiguity and constant change.

Remote work-related

- **Facilitating effective integration -** Helping new hires adapt to the company culture and establish relationships with their team can be challenging, especially in remote work environment. Ensuring they feel welcomed and included requires ongoing effort from both the talent management team and their colleagues.
- **Connection** due to remote working
- While we try to prepare and share challenges with the team members, it has not been easy to always do in-person immersions, so **challenges of the actual work in those geographies becomes tough to explain in the induction/orientation.**

Ensuring Completion

- **Most of the time new joiners could get rushed into their job roles**, missing inductions and spending time understanding the organization & their role.
- **Urgent need to start delivering** - Most roles require the individual to start producing or executing their function from day 3 itself if not day 1. Once they get into their routine work, the employee finds it difficult to take time out to complete the onboarding.

Other challenges

- No Challenges in onboarding or imparting induction. Challenge is in **ensuring compliance of policies trained** during induction
- Onboarding process is currently being reviewed from a DEI perspective but it is difficult to influence external vendors like HRMS/Bank vendor/Payroll vendor and their process/communication to be more DEI conscious

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Ideas Set 1: **Pre-joining and Joining**

Interviews

- **Three Point Interviews System** - 1. Organization and JD intro call along with Policies and key documents are shared for reading. 2. Assignment - Technical + Functional. 3. Two rounds of interviews.
- **We always collect feedback from the applicants that don't make it through the organisation selection process**. This can be taken anonymously by the applicants too. This helps us improve our pre-onboarding processes.

Pre-joining comms

- Pre joining **communications sent to candidate well in advance** to set expectations for Day 1
- Communication before onboarding

Resources

- Online Portal with **Pre-loaded Modules** that we keep a track of
- We publish an **annual Employee Engagement report** that highlights all our staff welfare programs. This **report is shared in print** with new joiners to give them a sense of the various employee welfare initiatives we offer. It's presented in a friendly and approachable style, rather than as a formal document.

Ensuring induction for all

- Conducting **induction for all new joinees** irrespective of their level or designation on the date of joining.
- Conducting **program induction for all joiners** irrespective of their program assigned to get a overview of the organization programs.

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Ideas Set 2: **Warm welcome and Ensuring the Process**

Keep it warm

- We have a welcome **kit for new ones** and have the HR team greet them on their day 1, and induct them into the organisation. We introduce them personally to each person in the organisation so that they feel more comfortable. We focus on the little gestures for the new ones to make them feel welcomed into the org - coffee chats with senior team.
- **We send an introductory email to the entire team**, including a brief bio and photograph of the new hire. The new member is also added to the company website, welcomed on our common communication channels, and included in the WhatsApp group. In our monthly common meeting, the new joinee introduces herself/himself to the entire team.

Ensuring process

- **Dedicated onboarding days**, helping HR team plan better. Particularly when we work on tight schedules.
- **Completing the admin process in first two days** like setting up HRMS profile, insurance data, bank accounts etc.
- We coordinate and **prepare inductions that are customized for each individual** based on their prior knowledge and understanding of similar work, geography etc. Of course this is possible due to the strength of the org being smaller so please take that into consideration.
- **A comprehensive first week** focused on getting to know the organization, its people, and each employee's role in the larger picture would help employees feel at ease and foster a sense of familiarity. A fitting welcome and clear guidance for the orientation journey might seem simple, but nothing eases new employees more than a warm welcome and a well-structured plan for the week. A well-organized schedule ensures their first week is smooth and provides opportunities to connect with the HR team, preventing any feelings of being stranded and helping them understand their role from the start.
- **Ensure that induction program is conducted with a month of joining**, preferably on the fist day, nut is the number of new staff is less than 5 we wait for a batch to be formed. We often **invite all staff to the induction program** that can be used as refresher training session. We have a Mentor and Buddy program. Access to all documents covered in induction is given to all staff through our online portal

Ideas Set 3: **Induction Content and Pacing**

Induction Content

- Manager Onboarding - **handover of performance**
- Inducting it to the quarterly **performance review process**
- **Discussion of responsibilities & KRAs**: Discuss job responsibilities and KRAs with reporting manager, HR, and CEO.
- **Our Diversity and inclusion** (larger focus on gender as it is an area of work for us) training is something we have recently designed - earlier it was just a policy document. Our Health and safety training is something again we are now putting rigor into training for.
- We have a fun induction presentation, we do keep focus on communicating the organisation's culture and values in the induction and we are quite transparent in our induction and expectations.
- **Comprehensive organizational orientation:** Introduce vision, mission, values, our story, programs, impact, organization structure, HR policies, code of conduct and introduction to the team.

Induction Pacing

- Information Sharing (induction sessions, team orientation, online videos) is spanned across few days (weeks in some cases) and also **kept flexible** to ensure new joinee is not overwhelmed with information
- **Giving a new joinee their time to settle** would help. As much as pace is important, their wellbeing is important

Leadership exposure

- **MD address** to all new joinees on monthly basis.
- **Face time** with skip level
- The org orientation - the team gets to **interact with 50% of our leadership team**, the readings have an element of research papers and articles that gives a deeper insight into our work, the focus on culture and our values and ways of being,

Ideas Set 4: **Support Structures**

Buddy system and shadowing

- **Eight participants** spoke about the buddy program as a best practice. E.g. "Buddy system has been helping us to make sure the new joinee feels welcomed into the system and they have a friend to go to."
- 3-4 participants also talked about **job shadowing.** E.g. "New joinee shadowing all other team members to understand their role."

Field Exposure and Observation

- As we work in vocation education, we organize one day for practical understanding of the project. Also, school visits help new joinees understand the program on ground.
- Exposure to all programs
- **Session/Training observations** allow the new joinee to see the principles of the organization in practice and leads to visual understanding of the key work area
- **We ensure field induction (field visit)** to ensure every employee whatever role or level they join need to understand our program model and ground challenges.
- School & Community visits planned for all roles

Other Support Systems

- **Role-specific induction & mentoring:** Reporting manager-led induction with a mentoring and buddy system.
- **Resource Sharing:** Provide access to organizational decks, program process documents, HR policies, and online platforms.
- **Having fun:** induction starts with a game to know each other and often a team dinner. // Fun Friday

Ideas Set 5: **Monitoring & Evaluation, and Checking in**

M&E

- Multiple Choice Questions after induction
- Feedback survey

Checking In during Orientation

- **Our 30-60-90 day model of doing checkpoints** has proven results. It helps us assess and grow someone in the role and provide clear feedback from the get-go leading to improved performance.
- **Employee check-in after one week and 1 month** after joining
- Conducting regular check-ins with new hires (e.g., after one month) ensures that they receive ongoing support and feedback.
- Feedbacks / Survey /1-1 connects in the first 3 months to ensure new joiner has settled in.
- **Yes, regular touchpoints are very important for the new join** to feel welcome and settled. Hence in small organizations, HR and reporting manager should regularly speak to the employee. In larger organizations, the department head should have a quarterly calendar to meet all their reports.

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Onboarding Examples (1/6)

Selected examples of onboarding program's overview provided by participants

During the induction process, we organize **interactive sessions with various team members**, including dedicated sessions with the CEO and Manager. This program spans **one to two weeks**. Upon completion, we gather feedback from the new employees and share any critical insights with the relevant teams. Each team utilizes specific induction decks, which are regularly reviewed and updated.

1. **Org :** We have an organisation induction that gives a general overview about the programmes, our history, core principles of our work.
2. **Project:** We then have programme/project specific inductions. This differs per role. For associate roles this is done over one meeting with several pre-reads. For Managerial and above, they usually meet with multiple people from the team since their work intersects with several others in the organisation.
3. **Ops:** We then have an Accounts and Finance induction where our Accounts & Finance team takes the new joinees through the procedures.
4. **Reporting:** Finally, we have a reporting induction where they get acquainted about their periodic donor reporting duties and how that process will look like for their specific programme.
5. **30-day plan:** We also additionally chalk out their big outcomes and activities for the first 30 day period at the 7-day mark. This is done at the end of the induction week. (And a meet-n-greet with the whole team of course!)

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Onboarding Examples (2/6)

Selected examples of onboarding program's overview provided by participants

[Online] Our team works remotely and hence **our inductions happen online**. Our induction process is designed to ensure a smooth and comprehensive onboarding experience for new hires. It includes **several key steps**, such as setting up the necessary tools and accounts, introducing the new hire to the team, and assigning a buddy to help them acclimate to their new role. We also **provide access to important resources and documents,** including our internal drives, communication platforms, and team guidelines. Additionally, we **conduct an induction session** that covers the organization's values, culture, and expectations, ensuring the new hire feels welcomed and well-prepared from day one.

- **The HR Induction is conducted on the day the employee joins**, whether it is 1 or more employees.
- **Finance induction happens monthly** and **project induction once in 2 months**.
- "**Train the Trainer**" sessions for Trainers are held for 2 months.
- Also the **MD addresses** the new joinees once a month.

Basic org overview covering the history & values of organisation, Structure, insights on all governing policies & HR processes will be covered during induction.

Besides that each new employee will be tagged with a buddy to support them with getting settled along with HR team. They will be also provided with material to review on their own.

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Onboarding Examples (3/6)

Selected examples of onboarding program's overview provided by participants

Pre-joining: If an applicant is selected but must complete their notice period before joining, we provide documents, online modules, and self-paced reading resources to help them understand our organization, their role, and Early Childhood Education (ECE). We also share relevant policies with them beforehand. If an employee can join immediately, these resources are provided once they start.

On their first day, we conduct an HR orientation to complete basic documentation, create email IDs, and provide access to resources. We also give a brief overview of the organization's history, current focus, and priorities, and introduce them to our various programs and teams. During this orientation, we review our policies and address any questions they might have. We conclude by gathering a formal introduction message from the new employee, which includes their background and interests, and we share a welcome email with the entire team.

Following this, role-specific onboarding begins. The new employee's reporting manager guides them through their role, sets routines and rhythms, and initiates role-specific context and skill-building activities. This process varies depending on the role; for some, it involves experiential learning, such as field visits and shadowing during school visits, while for others, it may involve reading documents and exploring products. The duration of this process can range from 3 days to 1 month, depending on the role and the individual's skills.

Additionally, the new employee has the opportunity to connect one-on-one with the leads of each team to understand how those teams function and how they interact with the employee's role. We also ensure close support is provided until the employee feels comfortable in their role.

Disclaimer: All the information is as provided by the survey respondents. The quotes may have been mildly edited for readability and anonymity without change in essence.

Onboarding Examples (4/6)

Selected examples of onboarding program's overview provided by participants

- **Project induction:** Although we have an induction where each program manager shares an overview of their program - this is ad hoc and happens once / twice a year after there is a cohort of 10-15 employees - who are brought to HO for the same. A lot of times we make do with online induction sessions for all new hires (6-8). This happens ad-hoc.
- **Ops team:** Apart from this, we have **monthly induction sessions on operations team** (travel booking, reimbursement, IT support etc).
- **HR Induction:** Each new hire also undergoes a HR induction on the day of joining where they are acquainted with the policies, systems and joining formalities.
- **For managers:** For those who join at Manager level and above, we have individual session with other programs (as necessary) in the initial month of their induction.

Our orientation program spans a week and includes 5-6 hours of daily training. While the sessions are structured and scheduled, they are designed to be interactive, engaging, and gamified, ensuring they are both enjoyable and highly informative. During the HR orientation, new employees are introduced to our organizational and functional policies, work guidelines, culture and values, and the essential tools needed for their roles. Beginning on the second day, they receive detailed introductions to each department, gaining a comprehensive understanding of each team's function at the organization to help them forge valuable connections.

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Onboarding Examples (5/6)

Selected examples of onboarding program's overview provided by participants

- We have a holistic **Induction and Onboarding docket** which gives an overview of **tasks to be completed within first three months**.
- HR, finance, comms and PF+Asset inductions are conducted with first week of joining.
- Additional reports, readings, modules on prioritised skills, reflection meetings are **self paced** to be completed with the 3 months.
- HR conducts 2 probation catch-up calls to understand how the team member is settling in. We assign probation KRAs which are a combination of program and development KRAs as the team member is on the job from Day 1.
- **We collect feedback on Induction docket** which helps in revisions and iterations. CXO interactions are scheduled once in a quarter.

We have a 3-4 Day Induction Plan (spread across three weeks), which then extends into the Orientation. One day each of the first four weeks is an org orientation, each of these days has a mix of readings that give an insight into org culture, our model, research about the work we do and our history. These readings are also discussed/debrief by a different Leadership team member each week (one of them being our co-founder).

We also have a governance orientation in the first week to take them through policies, processes in the organisation, and orient them for the month.

We also have curated/recommended activities as part of the Induction that help new joinees experience the communities we work with and also different team members across the organisation.

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Onboarding Examples (6/6)

Selected examples of onboarding program's overview provided by participants

We conduct induction in 3 categories:

1) **Day Long Classroom Induction Session:** 15 - 20 joinees, either virtual or inperson)
2) **Departmental Immersion Sessions:** For most support roles, the heads of the functions conduct 60 to 90 minute sessions, orienting the new joinees on the operations
3) **A week-long residential program** for all new joinees at an external venue at the beginning of every academic year.

We have the following in our induction process –

1. Document collection
2. Organization specific module
3. Introduction to team members & reporting manager
4. Role specific orientation
5. Mentorship and on the job learning

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Contents

Acknowledgements

I hope the analysis is helpful for you as you strengthen your approach to supporting your employees.

When the first Compensation and Benefits benchmarking was done in 2022, it was an experiment in "collaboration for common benefit". And here we are today, when we have this *third* public report published for strengthening the sector – it has been quite the journey!

For the success of this endeavour, there are a lot of people to thank:

First and foremost, to **the 41 organizations that participated**: thank you for sharing your practices, your challenges and ideas. A special thanks to the first 5-10 organizations that filled the form, pioneeringly, and got the ball rolling!

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Thank you for the partnership in shaping this!

Regards,
Girish Ananthanarayanan
September 2024
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for this report

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UPI ID: ananth.girish@okhdfcbank

Your contribution is not viewed as a necessity, but rather as a gesture that encourages such voluntary effort towards creation of value-adding public resources.

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