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# THE **ON**BOARDING EXPERIENCE GUIDE

Understanding the power of  
effective onboarding for  
organizations and leaders

# INTRODUCTION

Onboarding and new hire integration have long been areas of focus for strategic HR leaders and hiring managers alike. Notable thought leaders from Harvard, MIT and other institutions define best practices and the case for accelerating integration, actions which reduce turnover and consequently save money, but equally measurable revenue and profit growth.

In today's uncertain business climate, due to COVID-19, organizations must place a renewed and evolved emphasis on Onboarding as well as assessments. Viewing these essential processes through a virtual lens can help ensure a more positive and beneficial experience.

# FOR THE ORGANIZATION

## THE CASE FOR ONBOARDING AND ACCELERATED INTEGRATION

### Impacts of Effective Onboarding:

1. Improves retention and reduces new employee's "buyer's remorse"
2. Aligns new employee with key business strategies
3. Increases productivity and reduces ramp-up time
4. Reduces turnover and consequently saves money
5. Increases profitability

### What the experts say:

- "People" companies outperform the market average and those with a focus on Onboarding have a **2.5x revenue growth** and **1.9x profit margin** than the least capable companies (*Boston Consulting Group, From Capability to Profitability, Realizing the Value of People Management, 2012*)
- The cost of a failed senior-level hire has been estimated to be as high as **10 times the salary** of the executive involved. (*Watkins, The First 90 Days*)
- **32% of global executives** rate their onboarding experience as poor. (*HBR, Onboarding is not Enough, 2017*)
- An average amount of time to reach full performance (making critical decisions with the right information and having the right people in place to execute) can be reduced from **6 months to 4 months** (*HBR, Onboarding is not Enough, 2017*)
- **69% of employees** are likely to stay with a company for three years or more if they have experienced great onboarding. (*SHRM*)
- **50% of companies** with standard onboarding programs report higher new hire productivity. (*SHRM*)
- **54% of companies** with onboarding programs experience greater employee engagement. (*SHRM*)

# FOR THE ORGANIZATION

## LEVELS OF ONBOARDING

The Harvard Business Review describes Onboarding programs as typically falling into one of the four categories (see continuum at right). Initiatives and support range from little or no support to significant investment.

The importance of Onboarding, while philosophically accepted by many, fails in practice simply because the keys to success take time and personal investment on the part of both the new executives and organizational leaders.

Furthermore, the use of assessments to measure personality traits, thinking style, behavior style and individual motivators can also fast-track a new hire's successful integration. Assessments are often used at the selection stage in the hiring process; however, they are equally important in Onboarding and Development.

Assessments provide both managers and new leaders valuable insights. Managers receive a Coaching Report and a Team Comparison View. The new leader receives an Individual Development Guide as part of the Learning Plan which gives increased self-awareness as to their strengths and blind spots.

## THE CONTINUUM OF SUPPORT

### SINK OR SWIM

- Succeed independently or fail completely; leaves much to chance

### BASIC ORIENTATION

- Basic introductions to support structures; tactical and transactional; introduces "lay of the land," conducted by Admin and Operational staff

### ACTIVE ASSIMILATION

- Making efforts to help people understand organizational culture and politics; enculturation, led by Senior level staff and coaches

### ACCELERATED INTEGRATION

- Investing resources in bringing people up to speed quickly, including personal-identity and organizational socialization; includes all components of Orientation and Active Assimilation

# FOR THE ORGANIZATION

## TOOLKIT AND KEY DIFFERENTIATORS FOR SUCCESSFUL ONBOARDING PROGRAMS

Below are recommended components for different levels of Onboarding. In the case of our new normal with travel restrictions and social distancing, virtual tours could replace introductory site visits. In-person New Leader Assimilation sessions can occur via video calls. Previously where providing Mentors or Transition Coaches at the start may have been the exception, today's environment may require those offerings to become standard practice.

### LEVELS OF ONBOARDING\*

|  | BASIC ORIENTATION   | ACTIVE ASSIMILATION  | ACCELERATED INTEGRATION   |
|--|---|--|---|
| <b>ASSUMING OPERATIONAL LEADERSHIP</b> | <ul style="list-style-type: none"> <li>Operational Plans</li> <li>Detailed agenda for first week</li> </ul> | <ul style="list-style-type: none"> <li>Structured introduction to key business areas</li> <li>Introductory visit to key company locations</li> <li>Plan and expectations outlined for first 30 days</li> </ul> | <ul style="list-style-type: none"> <li>Opportunity to sit in on critical business meeting before day one</li> <li>Immersive experiences in unfamiliar areas of the business (e.g. rotations, on-sites)</li> <li>Plan and expectations outlined for 30-60-90 days</li> </ul> |
| <b>TAKING CHARGE OF THE TEAM</b>       | <ul style="list-style-type: none"> <li>Career histories for key team members</li> </ul>                     | <ul style="list-style-type: none"> <li>Performance and assessment data on team members incl. coaching reports</li> <li>Briefings to provide confidential insight on team members</li> </ul>                    | <ul style="list-style-type: none"> <li>Briefings on team dynamics and history.</li> <li>Facilitated workshop with the team (e.g. new leader assimilation) to also include a Team Comparison and Development Assessment</li> </ul>   |

# FOR THE ORGANIZATION

## TOOLKIT AND KEY DIFFERENTIATORS FOR SUCCESSFUL ONBOARDING PROGRAMS

### LEVELS OF ONBOARDING\*

|                                       | BASIC ORIENTATION   | ACTIVE ASSIMILATION   | ACCELERATED INTEGRATION   |
|---------------------------------------|---|---|---|
| <b>ALIGNING WITH THE STAKEHOLDERS</b> | <ul style="list-style-type: none"> <li>Relevant organizational charts; roles and responsibilities</li> </ul>              | <ul style="list-style-type: none"> <li>List of key internal stakeholders</li> <li>Introductory meetings with internal stakeholders</li> </ul>   | <ul style="list-style-type: none"> <li>List of key external stakeholders</li> <li>Briefings on stakeholders (e.g. their agendas)</li> <li>Pre-boarding—prior to start meetings with Board Members or key external stakeholders</li> </ul>   |
| <b>ENGAGING WITH THE CULTURE</b>      | <ul style="list-style-type: none"> <li>Statement of Company, Philosophy and Values</li> <li>New hire gift/SWAG</li> </ul> | <ul style="list-style-type: none"> <li>Briefing on culture and “ways of getting things done”</li> <li>Structured events to understand culture</li> <li>Personalized new hire gift/SWAG</li> </ul> | <ul style="list-style-type: none"> <li>A “cultural interpreter” or Mentor to provide insight</li> <li>External Executive Transition Coach</li> <li>Assessment to highlight differences between current and former cultures, including understanding of type of transition: Start-up, Turnaround, Accelerated Growth, Realignment, Sustaining Success</li> </ul> |

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## TOOLKIT AND KEY DIFFERENTIATORS FOR SUCCESSFUL ONBOARDING PROGRAMS

### LEVELS OF ONBOARDING\*

|   | BASIC ORIENTATION   | ACTIVE ASSIMILATION   | ACCELERATED INTEGRATION   |
|---|---|---|---|
| <b>DEFINING STRATEGIC INTENT</b>  | <ul style="list-style-type: none"> <li>• Business Plans</li> <li>• History of the company and past performance</li> </ul> | <ul style="list-style-type: none"> <li>• Strategic plans for the business (e.g. long-term priorities)</li> <li>• Conversations with key stakeholders on strategic challenges</li> </ul>   | <ul style="list-style-type: none"> <li>• Opportunity to participate in an off site strategic meeting</li> <li>• Dedicated workshop on strategy and existing plans</li> </ul>  |
| <b>ORGANIZATIONAL &amp; PERSONAL IDENTITY SOCIALIZATION</b><br>(ENCOURAGING THE NEW LEADERS TO EXPRESS THEIR UNIQUE PERSPECTIVES AND STRENGTHS) | <ul style="list-style-type: none"> <li>• Welcome message, bio</li> </ul>  | <ul style="list-style-type: none"> <li>• Help new leader identify their authentic strengths: including a storyboard of personal highlights, when at best, in roles playing to strengths, etc.</li> <li>• Share Leader's Journey and Personal Highlights Storyboard with key stakeholders</li> </ul> | <ul style="list-style-type: none"> <li>• Highlight organizational-identity from senior leaders and star performers</li> <li>• Discuss opportunities for new leader to apply best self and authentic strengths in context of new organization</li> <li>• Design a personal learning plan</li> <li>• Integrate an Assessment Tool for Development including a Manager Coaching guide</li> </ul> |

# FOR THE NEW LEADER

Organizations are preparing robust programmatic approaches to Onboarding and are now adapting them for remote realities. In order for Onboarding to be successful, new leaders must come to the organization, now more than ever, ready to "*own their own success.*"

New leaders should strive to be more patient and intentional in their relationship building approaches, particularly when starting a new role.

They should demonstrate that they can:

- Show people they care by practicing active listening with a genuine vulnerable spirit.
- Build connections and community with coworkers and stakeholders.
- Foster environments of transparency and frequent communication.
- Give people opportunities to turn ambiguity into skill building of resiliency and innovation.
- Instill hope and gratitude

The following checklists offer new executive leaders helpful beacons to aid in steering their own ships through the often-uncharted waters of Onboarding.



# FOR THE NEW LEADER

## PERSONAL INVENTORY AND SUPPORT SYSTEMS

### checklist for yourself

- What are your strengths? What are your vulnerabilities? Blind-spots? How do you plan to compensate for them?
- What personal disciplines do you need most?
- What can you do to have more control over your environment?
- What can you do to ease your family's transition?
- In which area will you need the most support-technical, cultural, political or personal?
- Develop your Learning Plan—what do you want to learn and how will you go about it?
- Assess and align for strategy and planning
- Identify early wins
- Assess continuously: seek feedback, ask for help

## PERSONAL INVENTORY AND SUPPORT SYSTEMS

### checklist for your network

- Create a Relationship Map and Influence Landscape—identifying allies, influencers, contrarians
- What are your priorities for strengthening your network?
- Identify sources of power: expertise, control of information, connections to others, access to resources, such as budgets and rewards, personal loyalty



# FOR THE NEW LEADER

## PERSONAL INVENTORY AND SUPPORT SYSTEMS

### checklist for your team

## PERSONAL INVENTORY AND SUPPORT SYSTEMS

### checklist for your manager

- Clarify expectations early and often
  - Take responsibility for making the relationship successful
  - Identify your manager's areas of importance
  - Establish a relationship agreement
  - Pursue good reviews of those respected by your manager
- Assess current members—most powerful question: *What do you think?*
  - Define team effectiveness: Visioning, Purpose, Values, Goal Alignment, Clarity of Roles and Expectations, Norms, Communications, Process
  - Build Cohesion: Trust, Healthy Conflict, Commitment, Accountability, Collective Results
  - Engage People: Connect, Shape, Learn, Stretch, Achieve, Contribute Beyond Self
  - Diagnose, manage and sustain change
  - Understand the Change Continuum: Unawareness to Awareness to Understanding to Acceptance to Commitment
  - What are the From-To Behaviors?
  - What is the Pain and Gain? The Driving Forces? The Restraining Forces?
  - Apply the Disciplines of Change Sustainability:
    - Validate Readiness
    - Hand off the project to the business
    - Create a discipline of accountability
    - Establish learning and renewal

# FOR THE NEW LEADER

## CRITICAL QUESTIONS FOR NEW LEADERS IN STAKEHOLDER MEETINGS

*Checklist of questions to ask stakeholders within your new organization:*

- Tell me about yourself.
- Give me your read on the situation-strengths, opportunities, weaknesses, threats of the organization.
- What strengths/capabilities required? Which exist now?
- What do you see as priorities? Lower? Untouchables?
- What resources are available to invest against these?
- What will be signs of success?
- Tell me about control points: metrics, meetings, reports, systems, data, etc.
- Tell me about decision-making: who, what, when?
- What's the best way to communicate with you? (mode/manner/frequency/how should we disagree?)
- How will we work best together?
- What's the best thing I can do? What's the worst thing I can do?
- What did you do that was effective when you first joined? What would you have done differently?
- Understand types of conversations with direct reports and boss: situation, expectations, style, resource, progress, personal development

## MEET THE AUTHOR

ON Partners' chief people officer **Laura Stanley** developed the ON Partners ONboarding Experience Guide. Notes Stanley, "Onboarding programs are proven to improve new hire productivity, engagement and retention. With in-person meetings off the table for the next several weeks or months, our goal is to help clients and candidates translate what have always been best practices, often in the form of in-person engagements, into robust virtual assessment and Onboarding programs that can be as effective as in-person sessions."



**Laura Stanley**

**Chief People Officer**

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# ABOUT ON PARTNERS

ON Partners propels an organization's mission by building C-level and board leadership teams. Founded in 2006 by like-minded consultants as a values-driven alternative to the multi-service global firms they were leaving behind, ON delivers a better executive search experience. The firm has been named to the Inc. 500/5000 Lists six times, was named to the Inc. 5000 Hall of Fame in 2018 and is consistently ranked among the top 20 retained executive search firms in the U.S. Learn more at [onpartners.com](https://onpartners.com)

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