

The Total Onboarding Program ⁽¹⁾

An Integrated Approach to Recruiting, Hiring and Accelerating Talent

Section 2

This section is an executive briefing for upper management and other C-suite executive stakeholders. It is intended to be used (along with the companion book, *Onboarding: How to Get Your New Employees Up to Speed in Half the Time*) to engender initial high-level executive understanding of *The Total Onboarding Program*.

Overview of the Program

A comprehensive onboarding program benefits both new hires and internal recruits and dramatically improves individual performance, job fit, and readiness. A well coordinated onboarding program encompassing *acquiring*, *accommodating*, *assimilating*, and *accelerating* new team members also builds, sustains, and perpetuates high performing teams. More importantly, institutionalizing a systemic approach to onboarding provides a competitive advantage through the introduction of positive, sustainable cultural change. In addition, a well-executed onboarding program significantly drives new employee productivity, accelerates delivery of results, and significantly improves an organization's ability to retain talent.

So why do so few organizations take the time to manage the onboarding process so that new hires are given clear messages about the expectations of their teams or organizations? The simple answer is lack of practice. The truth is that onboarding occurs relatively infrequently in many organizations and, like any activity or acquired skill, expertise is lost or effectiveness greatly diminished without the reinforcement of practice.

The Total Onboarding Program provides your organization with a strategic, comprehensive, integrated, and consistent approach designed to build and institutionalize vital onboarding expertise. Once you have implemented it, you will see dramatic and direct benefits accrue to your organization.

BASIS FOR THE TOTAL ONBOARDING PROGRAM

The onboarding approach outlined here is based on our years of experience working with dozens of Fortune 500 companies through our executive onboarding and transition acceleration group, PrimeGenesis. In addition, a direct source for much of *The Total Onboarding Program* is the book, *Onboarding: How to Get Your New Employees Up to Speed in Half the Time* (Bradt & Vonnegut, 2009), which is included in this package.

(1) Note this document is taken directly from Section 2 of *The Total Onboarding Program*, Bradt and Bancroft – Wiley/Pfeiffer 2010

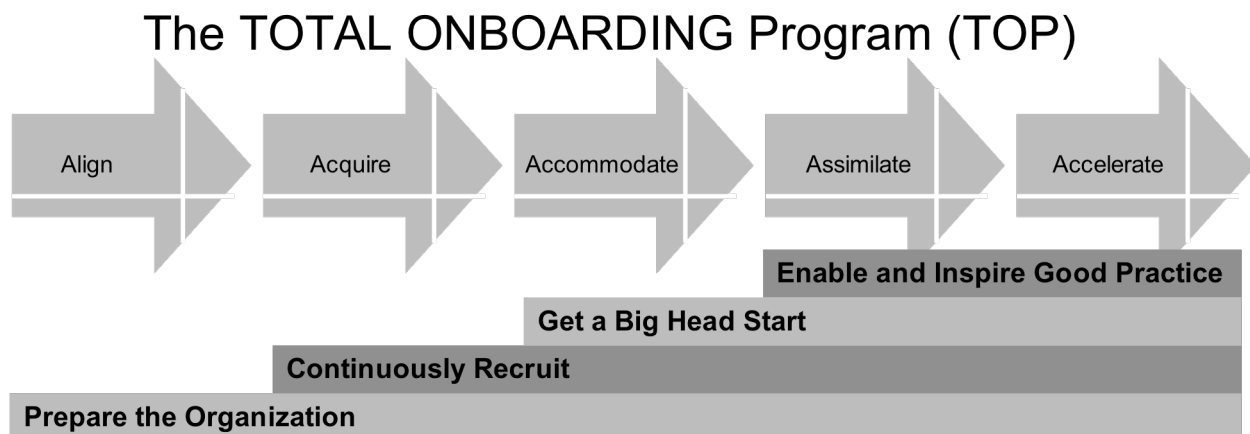
DEFINITION OF AND APPROACH TO ONBOARDING

Onboarding is the process of *acquiring, accommodating, assimilating, and accelerating* the success of new team members, whether they come from outside or inside the organization.

The Total Onboarding Program is built around five key elements that consider both the need for and role of a new team member with the organization. These elements are shown in Figure 1.1.

1. *Align*: Organizations must agree on the need for a new team member and delineate a clear role for him or her.
2. *Acquire*: Organizations have the responsibility to identify, recruit, select, and get the right people to join the team.
3. *Accommodate*: Organizations must give new team members the tools they need to do the work.
4. *Assimilate*: Organization must help new team members join with others to work effectively together.
5. *Accelerate*: Organizations must support new team members and their teams' efforts to deliver better results faster.

Figure 1.1



In our work helping organizations, we have seen repeatedly that a primary cause of misalignment and disengagement of new employees is the way that most organizations split up their recruitment, orientation, training, and management efforts. In many cases, the onboarding is uncoordinated at best, with multiple players overseeing discrete pieces of the process. As you might imagine, the results of such freestyle efforts are predictable:

- Candidate interviews conducted without the interviewer fully understanding the position being filled or the needed strengths for success;
- Inappropriate, high-pressure interviews that turn good candidates away;
- Selection of candidates unable to adapt to the organizational culture;
- New employees who report to work and find they have no desks, computers, or even managers to greet them; and
- New employees who innocently, but tragically, damage key internal relationships on the first day.

Likely you have heard about (or lived through) similar onboarding misfires. Clearly, organizations are not unfamiliar with the onboarding problems outlined above and spend a good deal of time and money looking for ways to avoid committing the same or similarly embarrassing organizational faux pas. Some have found success using sophisticated onboarding software systems to keep the “right hand” and the “left hand” talking to each other. Some take a more direct approach by holding managers accountable for the success of their new employees. While these and other onboarding approaches work for many organizations, the TOP approach offers a reliable, consistent, and higher level of effectiveness.

TAKING YOUR ORGANIZATION TO THE TOP

The Total Onboarding Program takes your organization to a new level of effectiveness by integrating the disconnected experiences and messages candidates and new employees receive during the recruiting and onboarding process. The core premise of TOP is simply this: When all your onboarding efforts move in the same direction, new employees get up to speed twice as fast and are more effective and productive. In addition, the organization benefits in the following ways:

- Compressed recruiting, hiring, and assimilation time;
- Reduced hiring mistakes, that is, everyone, including prospective employees, fully understands both the job and organizational requirements;
- Reduced new employee turnover and greatly improved retention; and
- Alignment of new employees with key business strategies.

Clearly, no organizational leader would argue that these outcomes are not worthwhile. What’s not to like about bottom-line benefit and a more efficient and effective organization? *The Total Onboarding Program* offers this and much more for organizations willing to make the commitment. What follows is a brief overview of the organizational and personnel requirements needed to take your organization to the TOP.

REQUIREMENTS AND APPROACH TO TOP

The primary requirements are that your organization’s hiring or personnel leaders (or external consultant) lead and implement the TOP effort and that this effort be focused on the building of an integrated program that will guide new employees or team members all the way through the onboarding process. We believe that building an effective onboarding process for new employees or team members is one of the most important contributions any hiring manager or human resources (HR) professional can make toward the long - term success of an organization or team. We created this approach out of the best of what we have seen and developed in our onboarding work since 2003, working with a wide range of organizations around the world, including American Express, Cadbury, Johnson & Johnson, MTV, Playtex, and others. *The Total Onboarding Program* has delivered breakthroughs in onboarding effectiveness and organizational success for hundreds of managers and client organizations¹.

IMPLEMENTING TOP

The Total Onboarding Program provides specific instructions and tools that enable those responsible to lead, plan, and deploy a total onboarding approach. From essential buy-in and implementation planning meetings for human resources, talent management, and hiring managers (Section 2) to a step-by-step implementation plan (Sections 3 through 6), the comprehensive onboarding plan offered here is designed to drive positive organizational change and transformation.

The Total Onboarding Program is grounded in well-researched principles of human behavior and workplace reality. These include the notion that people only change when they:

- Reach an impasse and are forced to change paths (“This is just not working anymore”);
- See that another path or way of doing things is better; or
- See value in and own their own contributions to the proposed change.

The TOP approach addresses each of these notions directly with a platform for change, a vision of a brighter future, and an offer of doable action steps (outlined below).

PLATFORM FOR CHANGE

Embrace the current reality - Leadership must build a deep understanding of the current state of the business, its people, plans, and practices before introducing change. Embracing the reality means that you:

- Understand what is working well and what must change;
- Incorporate as much as you can of what is comfortable in the proposed change; and
- Balance the risks and rewards for the organization (and yourself) before beginning.

VISION OF A BRIGHTER FUTURE

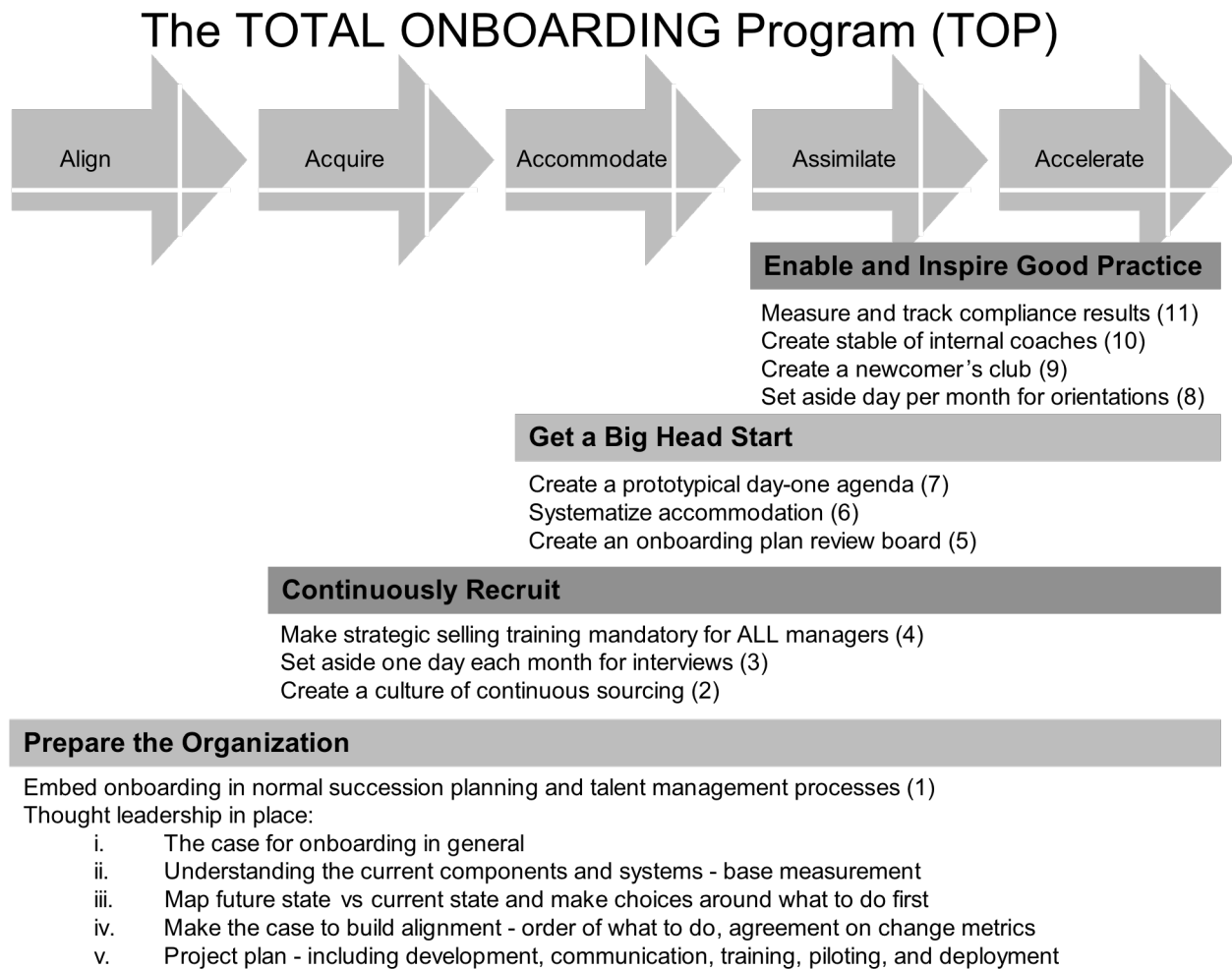
Share the vision - Change agents can only be successful if they can enroll people in the pursuit of a common vision. Change is a team sport. The TOP approach recognizes that moving forward is not about the change agent’s vision, but about the vision of those who live in the change. Everyone, from the custodians to the CEO and shareholders, must embrace the change.

DOABLE ACTION STEPS

Clear, manageable steps - The most effective change efforts, like the most effective communication campaigns, go through six basic steps and require everyone to play a part. The action steps of the TOP approach include:

1. Plan the effort and its key elements;
2. Seed the new ideas in advance to begin recruiting allies;
3. Launch the effort;
4. Roll out the effort, celebrating early wins and evolving as appropriate along the way;
5. Reinforce the effort by managing the inevitable discomfort, chaos, and anxiety; and
6. Institutionalize the change by integrating people, plans, and practices.

HOW TOP IS IMPLEMENTED



The TOP approach begins with five pre-launch meetings that set the stage for success. These steps are outlined below and shown in Figure 1.2. They are the central components of Section 2: Pre - Launch Meetings.

Keys to Successful Change

- Real understanding of current state;
- Dispassionate assessment of risks and rewards of change;
- Committed change agent;
- Top leader commitment;
- Rabid sponsors;
- Willing allies;
- Expanding constituencies;
- Clear path to success;
- Total quality, Six Sigma, Lean, 5F, RPI, or another appropriate system;
- Strong communication campaign;
- Early wins;
- Willingness to adapt the process itself;

- Identifying the inevitable crisis of confidence and managing through it;
- Following through;
- Institutionalizing the new reality so it sticks; and
- Measurement (pre and post, quantitative and qualitative).

Meeting 1: Make the Business Case for a Total Onboarding Program. Help leadership understand the business and organizational benefits of *The Total Onboarding Program* and chart opportunities for improvement.

Meeting 2: Understand the Current Onboarding Process and Systems. Make a baseline assessment of the “current state” of the onboarding process. Understand current acquisition, accommodation, assimilation, and acceleration of talent.

Meeting 3: Map TOP to Existing Systems. Find the gaps between the existing components and systems and an ideal system. Map current system and gaps, then use a change matrix to determine which to do first based on the impact/difficulty of change.

Meeting 4: Build Alignment and Manage Change. Make the TOP investment and focus case to key stakeholders, including decision makers and influencers. Include retention rate of new employees (within first eighteen months or year of employment); new employee engagement (using surveys); employee satisfaction with the onboarding process (using surveys); and new employee alignment with business goals (through performance ratings).

Meeting 5: Develop a Deployment Project Plan. Design a complete rollout plan suited for your organization, including a consistent message, coordinated media, and measurement metric.

ELEVEN STEPS OF IMPLEMENTING TOP

After the organization completes its planning activities (Section 2), the next activity guided by the TOP process is implementation. Outlined briefly below are the eleven steps in the process, described in detail in Sections 3 through 6.

STEP 1: EMBED ONBOARDING INTO SUCCESSION AND TALENT MANAGEMENT PLANNING

During this step, you build a plan that integrates and deploys the concepts and practices of the TOP throughout an organization. Embed onboarding into all succession planning and talent management processes to ensure consistent onboarding practices and organizational messages. This step is directed toward senior leadership, including HR managers and directors of communication and marketing.

STEP 2: CREATE A CULTURE OF CONTINUOUS SOURCING

Here you create a culture of keenly engaged hiring managers who are on constant lookout for good additions (from both inside and outside) to the team. The benefits are improved sourcing knowledge and skills and a greater pool of potential candidates for future opportunities.

STEP 3: SET ASIDE ONE DAY EACH MONTH FOR INTERVIEWS

During Step 3, you will rally managers to set aside one day each month for candidate interviews. This practice provides managers an opportunity for regular, deliberate interview practice, signals the importance of *The Total Onboarding Program* to the organization, and makes it easier for HR to schedule interviews for candidates.

STEP 4: MAKE TRAINING ON STRATEGIC SELLING TRAINING MANDATORY FOR ALL MANAGERS

Everyone benefits from deliberate practice in understanding the needs of others, figuring out how to solve problems, and communicating those solutions.

STEP 5: CREATE AN ONBOARDING PLAN REVIEW BOARD

At this time, you provide managers and their new employees input on their personal onboarding plans/new job plans and the announcement processes they used. This allows cross-fertilization of the best ideas while deepening the knowledge and skills of the onboarding managers and the members of the review board.

STEP 6: SYSTEMATIZE ACCOMMODATION TO AVOID REINVENTION

Create a repeatable process for hiring and onboarding new employees so that it can be delegated to others. Paperwork is necessary, but as long as it serves the process and provides the right information in an understandable way, it is a lower priority.

STEP 7: CREATE A TYPICAL DAY ONE ONBOARDING AGENDA

Create a standard, but flexible day one agenda for new employees that is implemented by every department. Design it so it can be continually evaluated and updated to reflect new ideas and/or organizational changes.

STEP 8: SET ASIDE A DAY EACH MONTH FOR GROUP ORIENTATIONS

Group orientations allow for consistent messages and elevate the practice to an event worthy of senior management involvement. Make this step crisp and exciting, driving assimilation instead of accommodation.

STEP 9: CREATE A NEWCOMERS' CLUB WITH EXECUTIVE SPONSORS

Members of the executive team can benefit from the informal feedback they receive during meetings with newcomers, and having a newcomers' club signals the importance of onboarding to the organization. New hires will benefit from the executives' experience and connections and everyone will see the importance for the assimilation process.

STEP 10: USE EXTERNAL AND INTERNAL MENTORS, COACHES, AND TRANSITION ACCELERATORS

Mentors and coaches are an important part of the TOP approach. Taking this step ensures that a stable of internal and external mentors and coaches is available for maximum impact.

STEP 11: TRACK AND MEASURE COMPLIANCE AND RESULTS

Measurement is an important part of the TOP approach. This final step helps to build the practice of keeping track of retention rates, engagement, and employee satisfaction with the onboarding process. Competitive advantages include market differentiation and new employee alignment with business goals.

ULTIMATE GOALS OF TOP

Our practice has helped us be able to make four basic observations about the relationship between employee performance and an integrated onboarding process:

1. *Role Failure:* A role failure can be due to unclear or misaligned expectations and resources. For example, an organization changes the circumstances, roles, location, or job responsibilities shortly after a new employee arrives. This might happen when an organization hires a new global head of customer service, then informs the new hire that a move to a new location is required or a new reporting structure will be implemented.
2. *Personal Failure:* A personal failure such as lack of motivation or culture fit might occur when a recruiter or hiring manager is not clear on job requirements or the importance of team or division culture. For example, hiring a new head of online marketing without direct Internet selling experience for a product line or division whose revenue stream depends on this skill.
3. *Relationship Failure:* A relationship failure can be due to a lack of understanding of office politics or personalities, for example, a new employee who contradicts a colleague (even innocently) or otherwise crosses an office boundary thus damaging an important internal relationship.
4. *Engagement Failure:* An engagement failure can be due to a manager or supervisor ignoring or leaving a new employee confused as to priorities or duties. For example, a new employee is assigned to a manager taking a three-week vacation or extended work assignment during the first month of employment.

No wonder so many new employees fail or decide to leave in the first six monthsⁱⁱ or that up to 50 percent of all new employees fail to deliver what their organizations expectⁱⁱⁱ.

FROM THE BOOK (PAGE 6)

“ We’ve found that 40 percent of executives hired at the senior level are pushed out, fail, or quit within eighteen months. It’s expensive in terms of lost revenue. It’s expensive in terms of the individual’s hiring. It’s damaging to morale.”

—Kevin Kelly, CEO of executive search firm Heidrick & Struggles, discussing the firm’s internal study of 20,000 searches^{iv}.

The four types of failure noted above are familiar to all organizational leaders, yet few organizations take the time or commit the resources to create an onboarding process that gives new employees clear messages about the expectations of their teams or the organization. Even fewer organizations use a strategic, comprehensive, integrated, and consistent approach like the one described in this workshop.

Leadership is about inspiring and enabling others. The care with which organizations acquire, accommodate, assimilate, and accelerate the success of their new employees is one of the acid tests of leadership. *The Total Onboarding Program* offers organizations the opportunity to demonstrate the exemplary leadership needed to build and implement an effective and ultimately business - and people - focused organization.

George Bradt and Ed Bancroft are partners in PrimeGenesis, reducing newly hired or promoted leaders' risk of failure from 40% to 10% by helping them and their teams deliver Better Results Faster, leveraging PrimeGenesis' team, tools, and perspective to prepare and implement 100-day action plans. www.primegenesis.com

ⁱ PrimeGenesis has reduced the failure rate fourfold for new leaders it has helped from 40 percent to 10 percent.

ⁱⁱ Kevin Martin, presentation to the Human Capital Institute, Washington, D.C. April 16, 2008. Aberdeen’s 2007 study indicated that 86 percent of employees make a decision to stay or leave the firm in their first six months or less.

ⁱⁱⁱ Smart, Brad. *Topgrading*. (Upper Saddle River, NJ: Prentice Hall, 1999).

^{iv} As quoted by Brooke Masters in “Rise of a headhunter.” *Financial Times*, March 30, 2009