

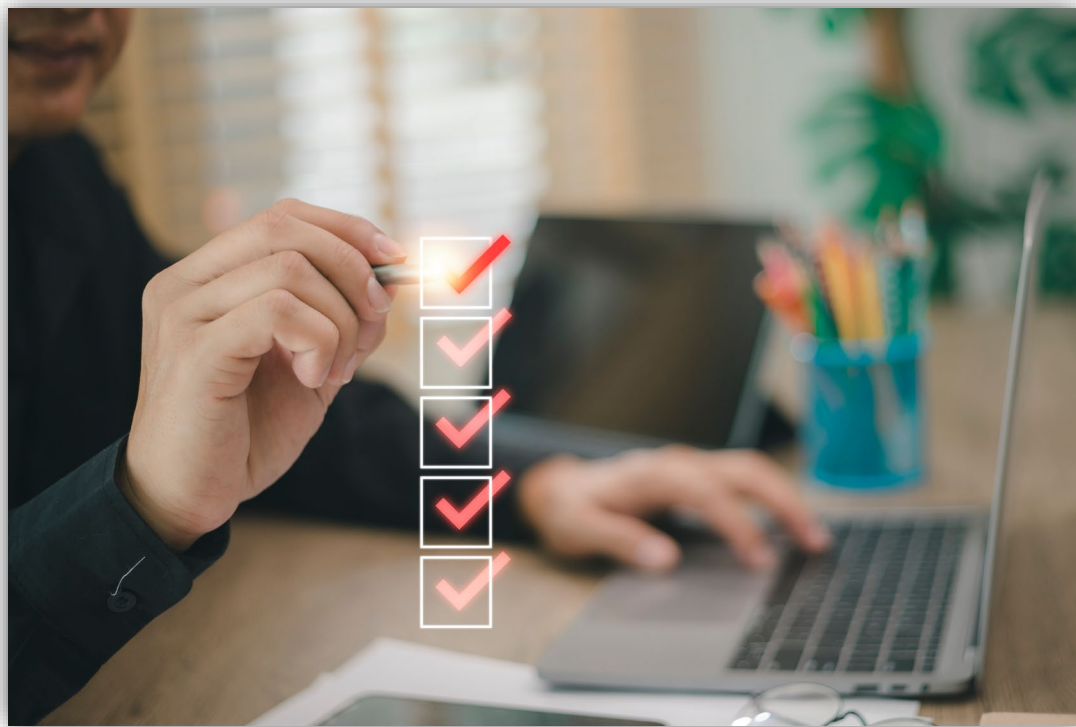
# Effective Onboarding

Building an Onboarding Program for  
Employee & Organizational Success

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Engagement





# Learning Objectives

- Articulate key data impacts of turnover.
- Define the 4 Cs of Onboarding.
- Articulate the 4 steps for creating an onboarding program.
- Define the 3 Bs of workforce planning as it relates to onboarding

# The Onboarding Experience



# Why Talk about Onboarding?



**86%**

of new employees determine longevity within 6 months.

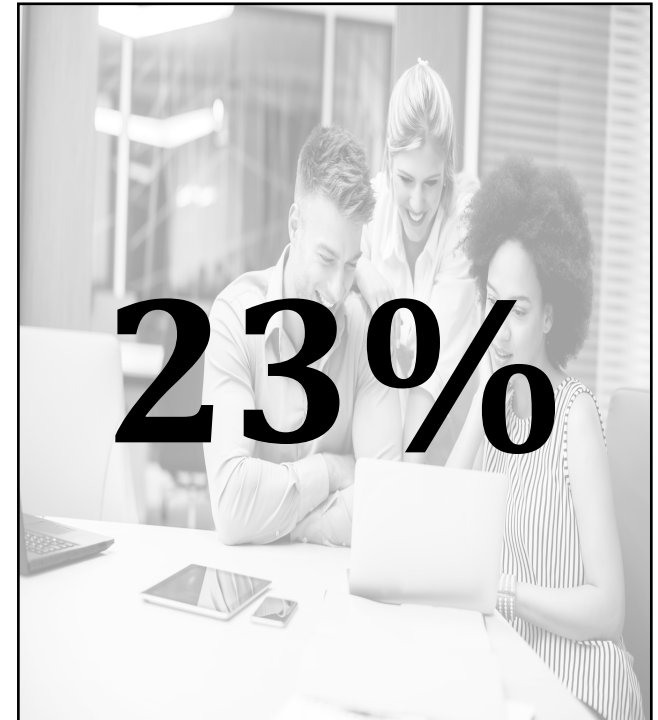
*Aberdeen Group, 2019*



**33%**

of new employees look for a new job within 6 months.

*Harvard Business Review*



**23%**

leave within the first year.

*Harvard Business Review*



# Why Talk about Onboarding?



**12**

The number of months for a new employee to reach peak performance potential.

*Gallup*



**29%**

of new employees feel prepared and supported after onboarding.

*Gallup*



**\$4,400**

The cost to onboard a new employee.

*SHRM*

# The Impact of Turnover

Research has shown that turnover has other consequences.

What do we think are some of those consequences?



# The Impact of Turnover

Turnover Affects:

- Service Quality
- Value Perception
- Work/project delays
- Staff Morale
- Team Performance
- Knowledge Loss



# The Good News on Onboarding



**69%**

of employees likely to stay beyond three years with a great onboarding experience.



**58%**

of new employees likely to stay with a structured onboarding.

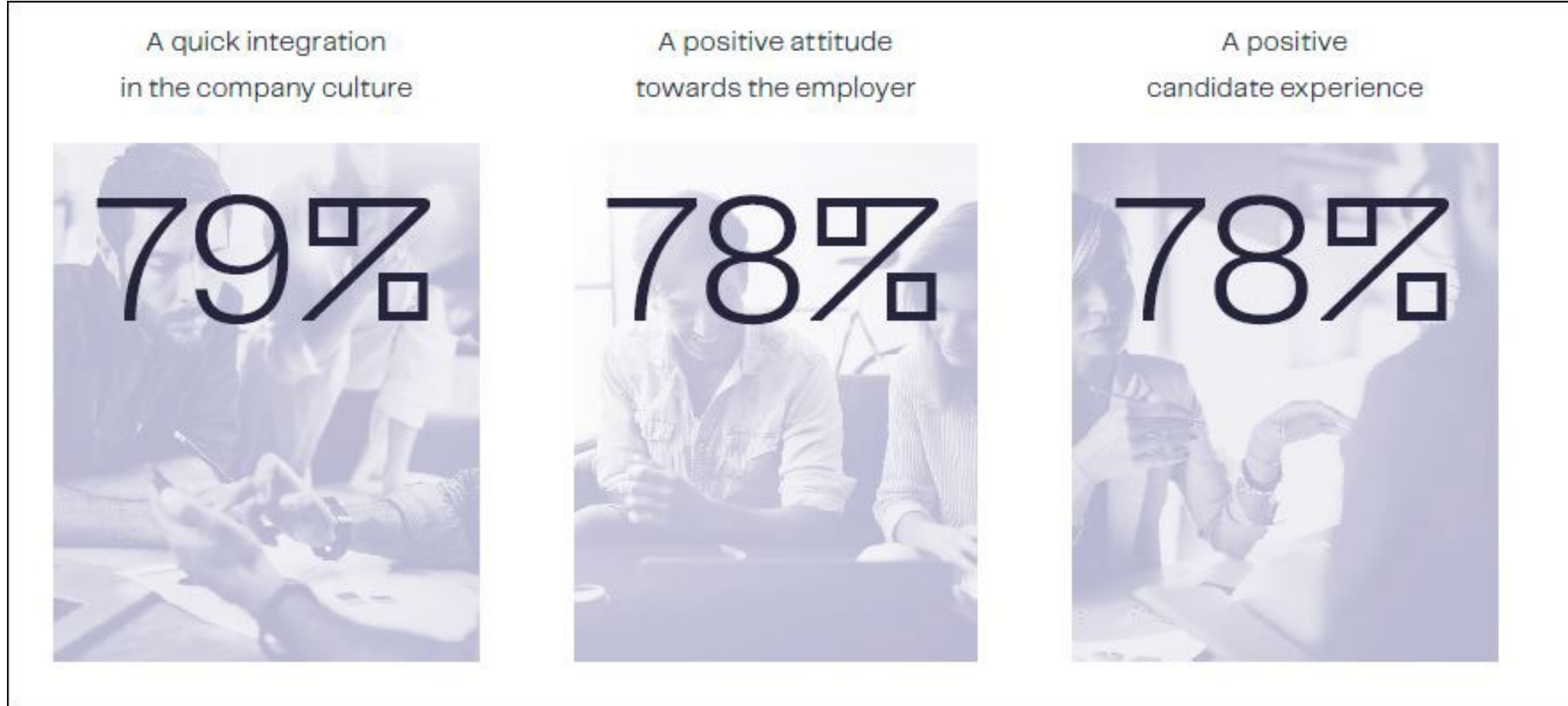


**50%**

of new employees likely to stay with a standard onboarding.



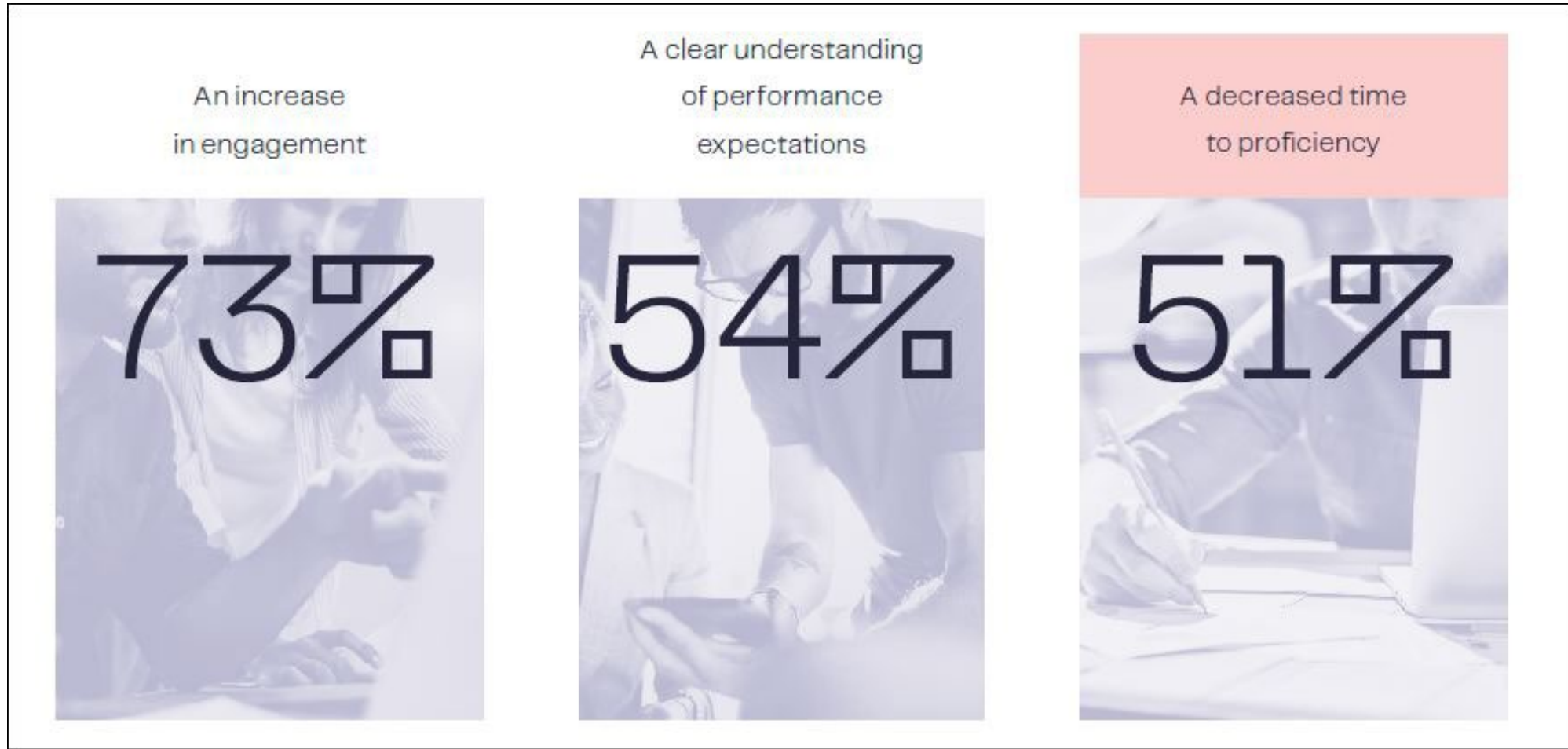
# The Good News on Onboarding



Talamundo, 2022



# The Good News on Onboarding



Talamundo, 2022

# The Purpose of Onboarding

People onboard all the time in our organization.

What do we think onboarding is all about?



# The Purpose of Onboarding - Integration

The objective of onboarding is to integrate employees into the mission and purpose of the organization.

Organizations should manage their performance expectations around the employee experience to close the gap between the two.



*Photo Credit: Forbes*

# The Purpose of Onboarding - Integration

Organizational Expectations	Gap	Employee Experience
Fast integration into company culture		Clear duties & expectations
Clarify responsibilities of role		Proper time for training
Interpersonal connection with Co-workers		Socialization with colleagues
Reduce time to contribution/competence		Guidance from the manager
Contribute to employer branding and organizational loyalty		Feedback & follow-up
		Overview of company structure
		A mentor
		Access to IT Systems

*Talmundo, 2022*

# The Purpose of Onboarding - Integration

Organizational Expectations
Fast integration into company culture
Clarify responsibilities of role
Interpersonal connection with Co-workers
Reduce time to contribution/competence
Contribute to employer branding and organizational loyalty



Process  
oriented over  
people focused



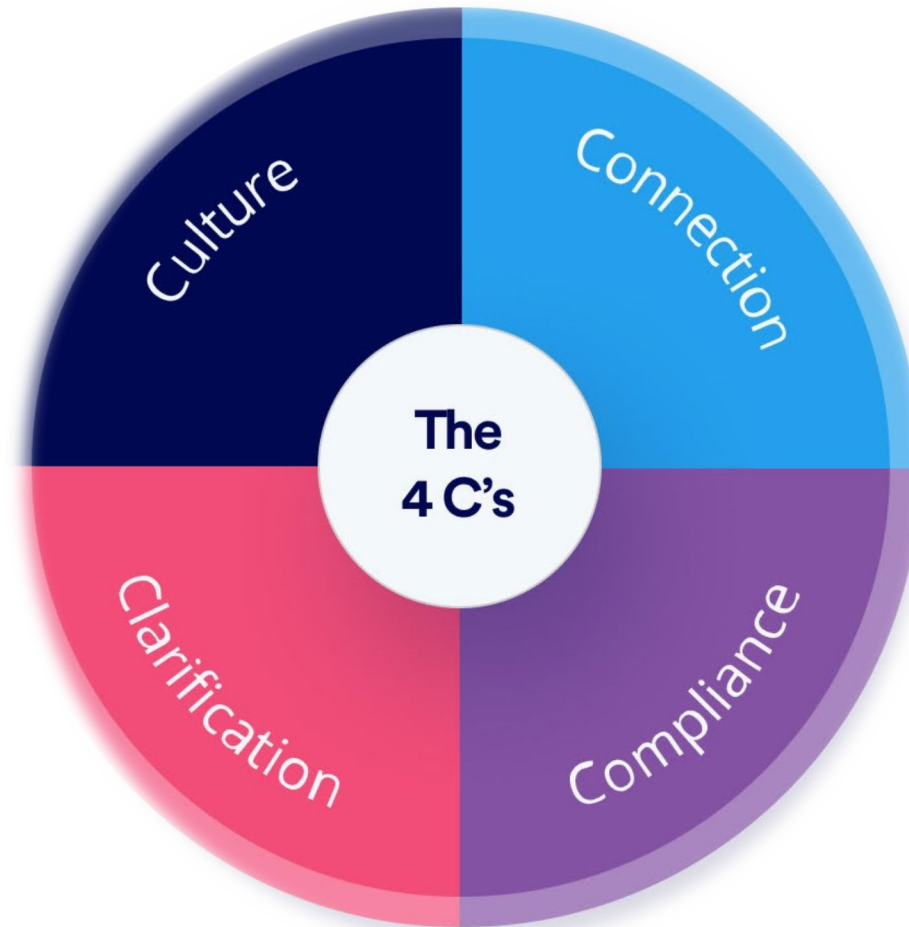
# The Purpose of Onboarding - Integration

Company is the  
right fit and set  
up for success



Employee Experience
Unclear duties & expectations
Lack of time for training
Socialization with colleagues
Guidance from the manager
Feedback & follow-up
Overview of company structure
A mentor
Access to IT Systems

# Effective Onboarding - The 4 Cs

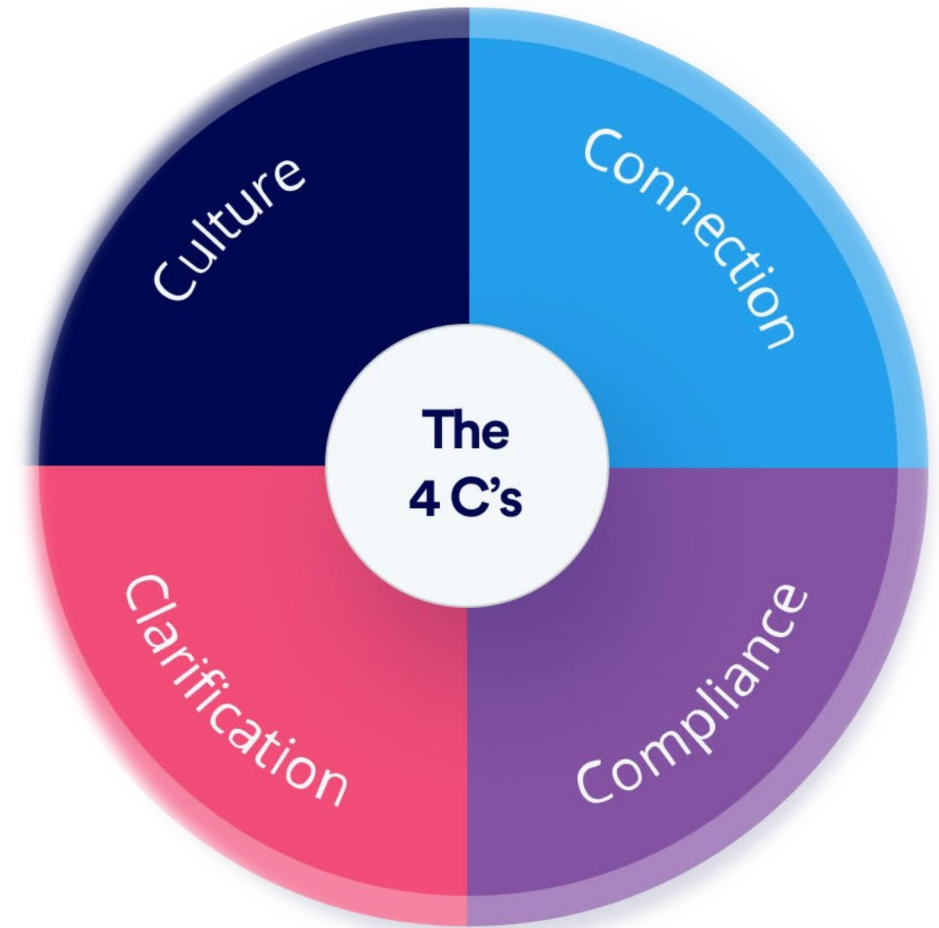


*Talya N. Bauer, PhD – SHRM Foundation*

# Effective Onboarding - The 4 Cs

## Compliance

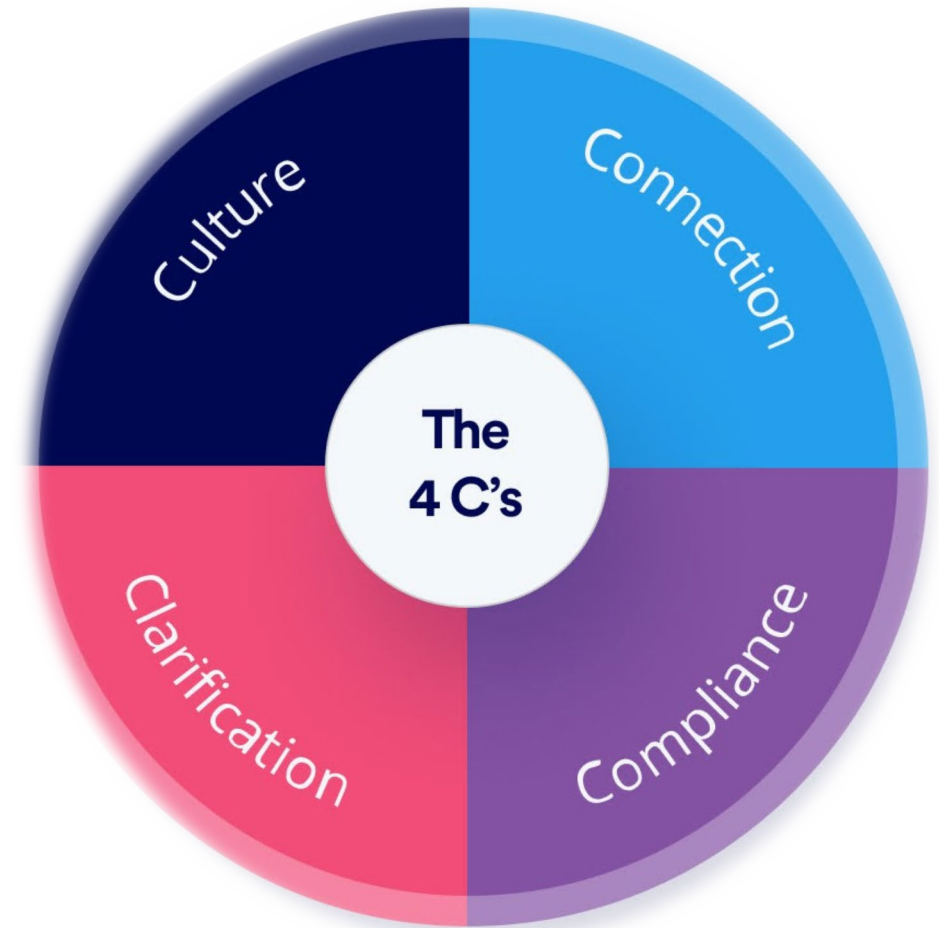
The lowest level of the onboarding experience that involves teaching employees basic legal and policy-related rules and regulations.



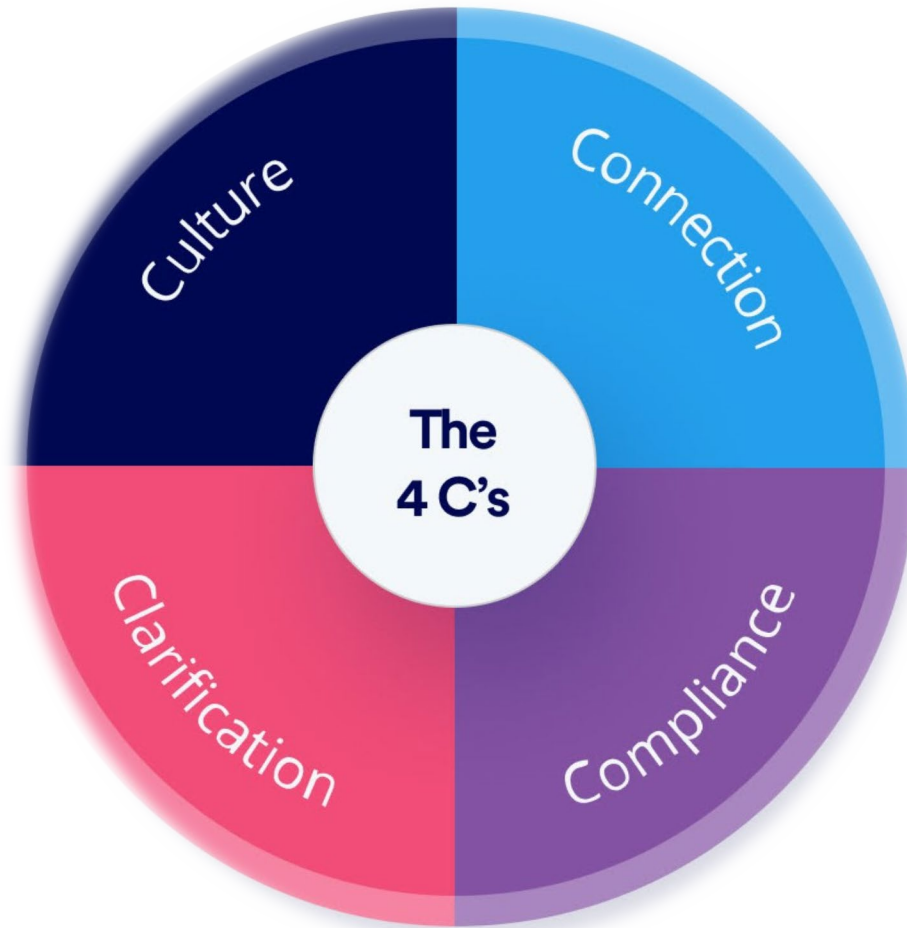
# Effective Onboarding - The 4 Cs

## Compliance

- Pre-boarding
- Documents/Forms
- Work equipment
- Benefits
- Company policies
- Building map
- Rules & regulations
- Parking permits/ID



# Effective Onboarding - The 4 Cs

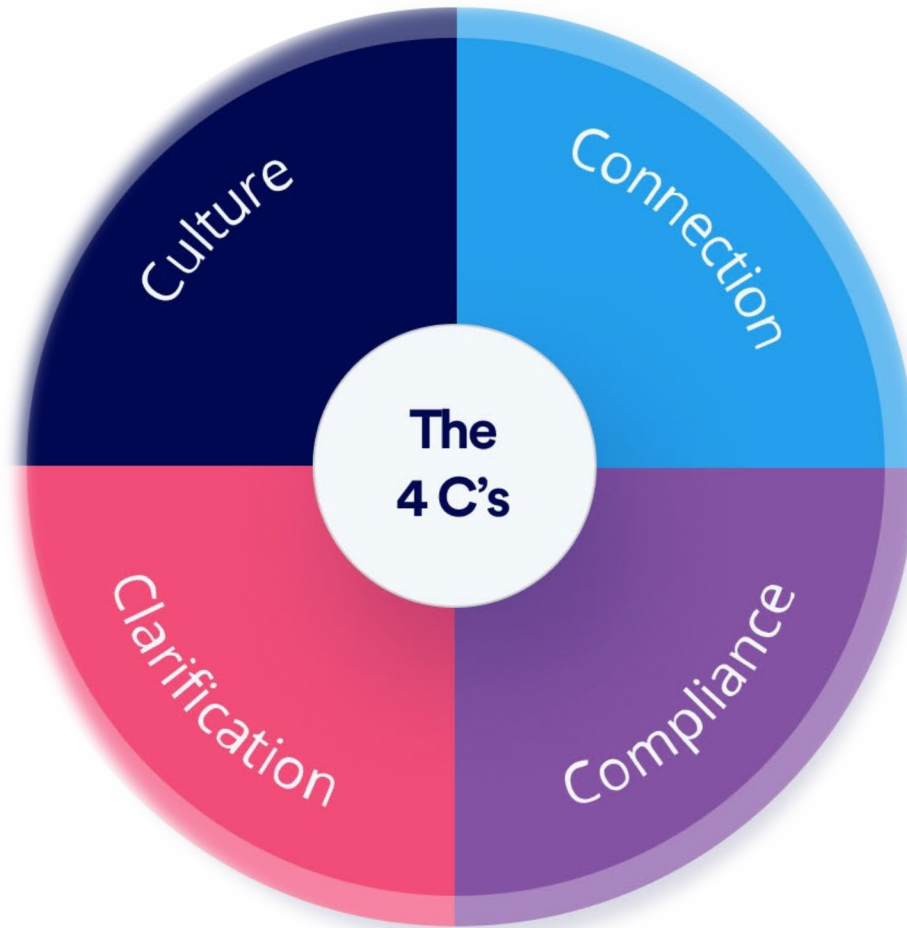


## Clarification

Ensure that employees understand their new job and all related expectations.



# Effective Onboarding - The 4 Cs



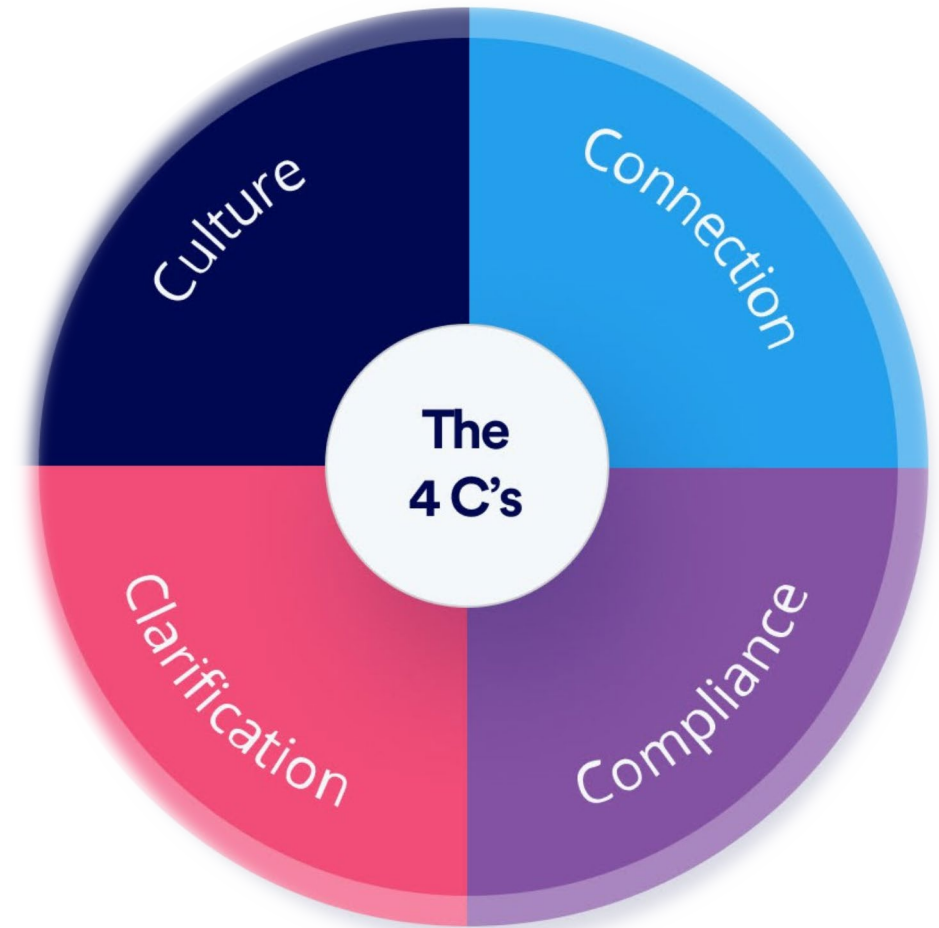
## Clarification

- Learning & Training
- Processes
- Projects
- Tasks
- Assignments
- Goals

# Effective Onboarding - The 4 Cs

## Culture

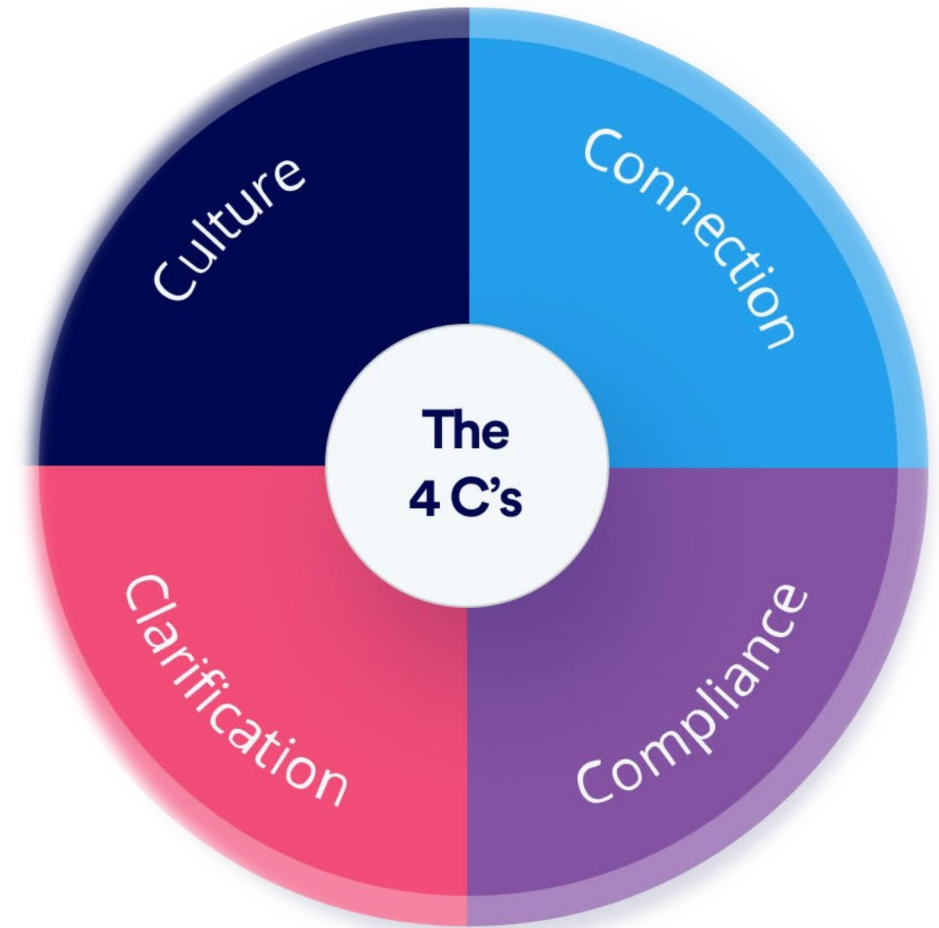
Providing employees with a sense of organizational norms – both formal & informal.



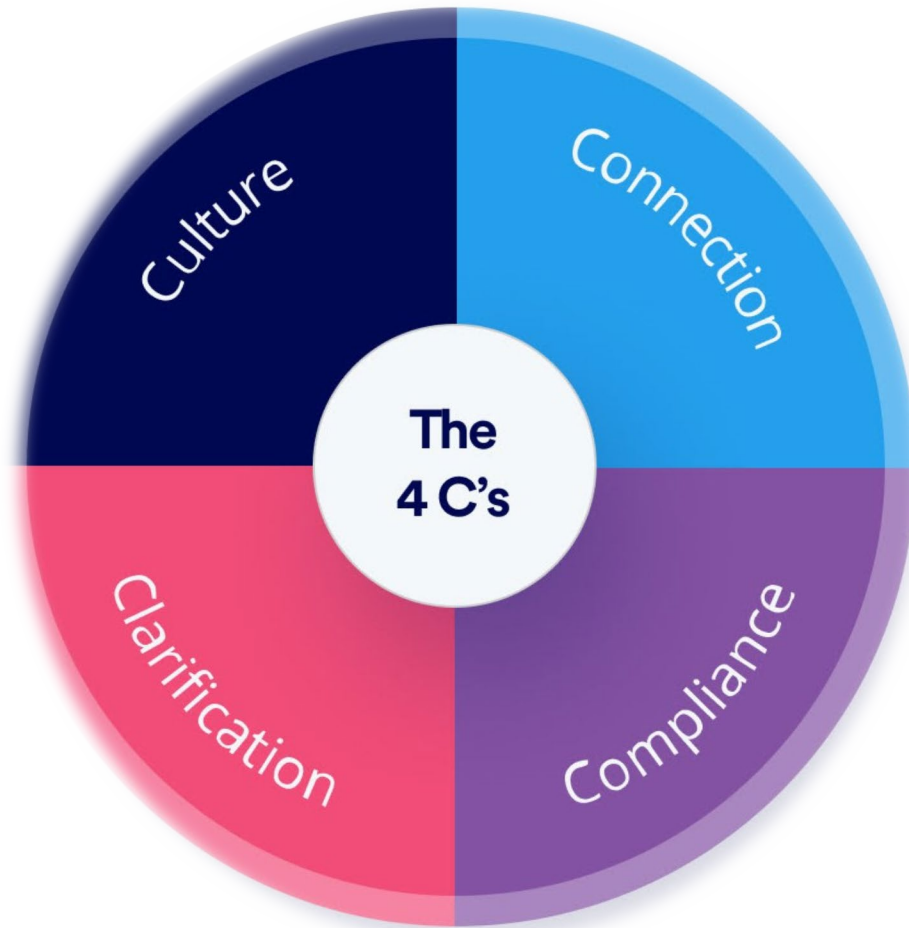
# Effective Onboarding - The 4 Cs

## Culture

- Norms & Traditions
- Mission & Values
- The employee & the organization
- How things work or get done.



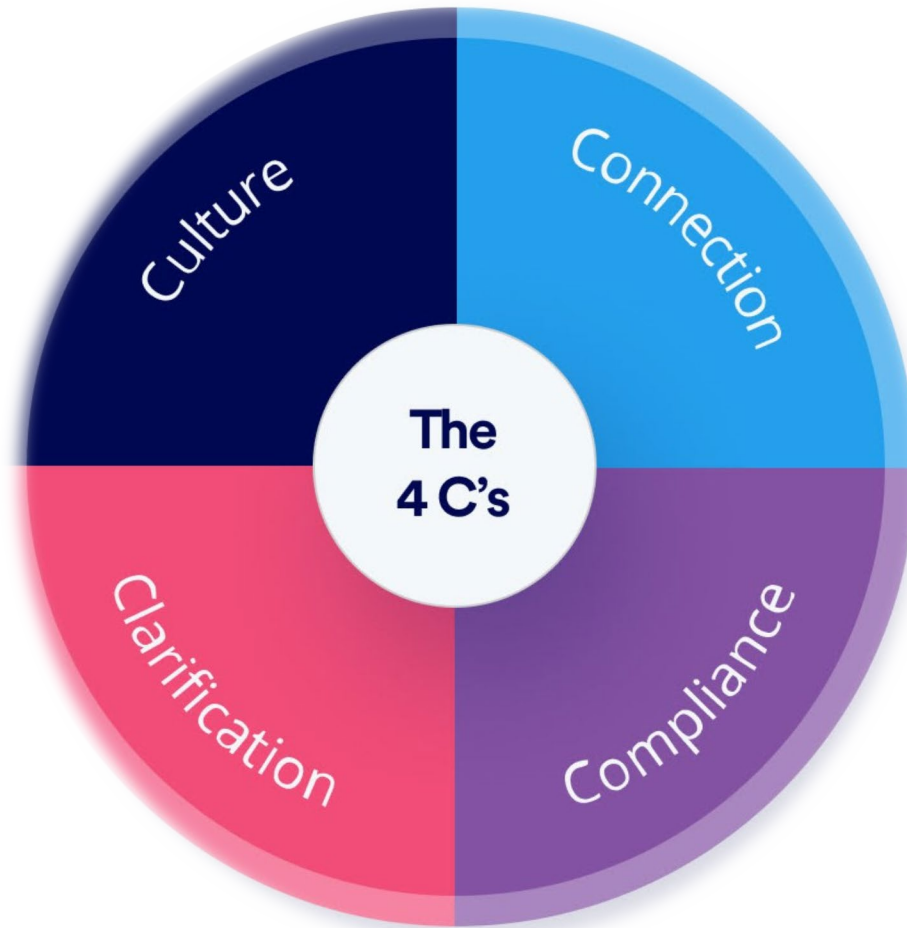
# Effective Onboarding - The 4 Cs



## Connection

The vital interpersonal relationships & information networks that employees must establish.

# Effective Onboarding - The 4 Cs

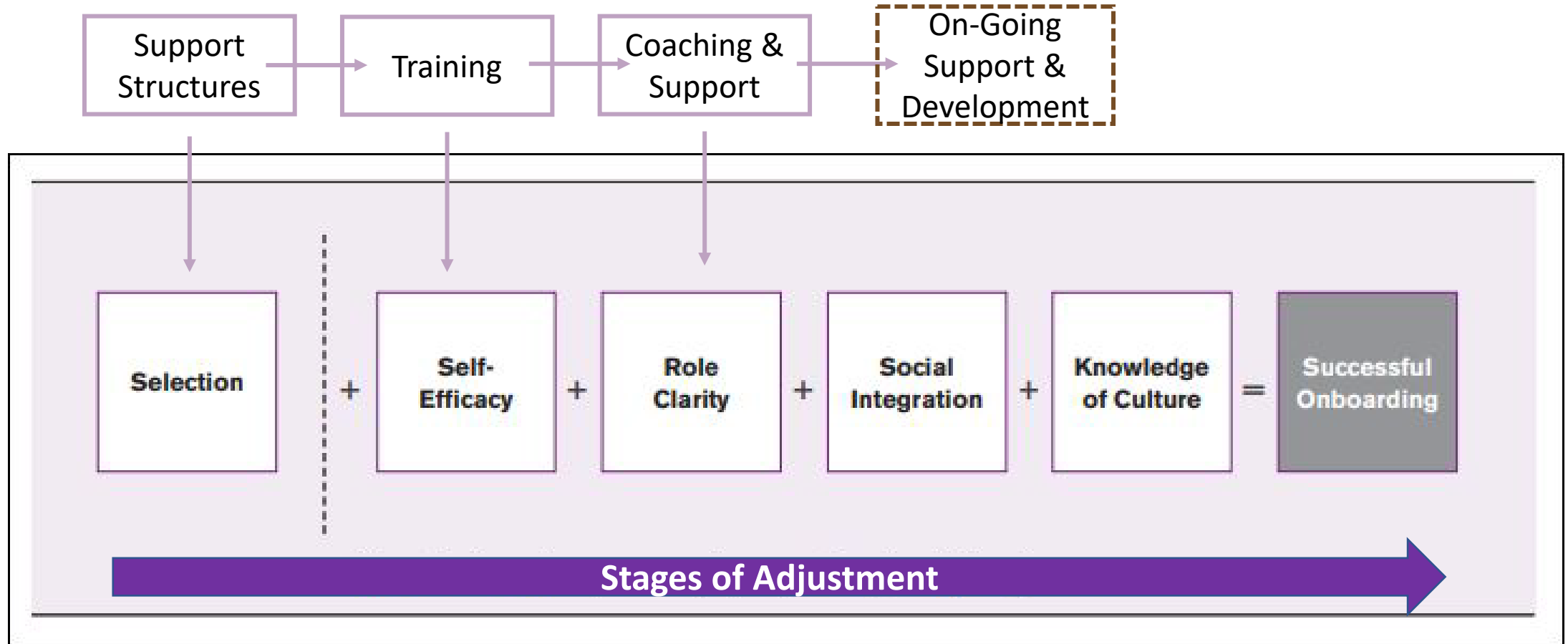


## Connection

- Team activities
- Meeting teams members and learning what they do.
- Assigned mentor/buddy



# Effective Onboarding - The 4 Cs



# Building an Onboarding Program

Onboarding doesn't have to be complicated, but it does have to be intentional!



# Building an Onboarding Program

## Step 1 - Mapping

What	Needs to be done	Benefits overview
Who	Is involved	HR – John Smith
Where	Does it happen	In-person/hybrid
When	Date & Time	Every third Tuesday at 10am

Mapping takes a holistic approach to onboarding

- Involvement of key parties
- Manager involvement
- Logistics
- Engagement methods
- Employee Experience

# Building an Onboarding Program

## Step 1 - Mapping

Onboarding is EVERYONE's job.

An onboarding program includes:

- HR/Compliance
- IT
- Job/Department specific rules/policies
- Job/Department specific training
- Layered cultural education



# Building an Onboarding Program

## Step 2 - Documentation

- Orientation Packages
- Schedules
- Training Material
- Building/Office Layout
- Points of Contact
- Places of interest nearby



# Building an Onboarding Program

## Step 2 - Documentation

Documentation Outcomes:

- Positive impression.
- Reference material for future review.
- Prepared material for mentors, managers, facilitators.



# Building an Onboarding Program

## Step 3 - Schedule



Scheduling helps organize and orientate new employees, inform managers of work interruptions, and manage resources.



# Building an Onboarding Program

## Step 3 - Schedule

Schedule Outcome:

- Positive impression
- Staff planning
- Contingency planning
- Resource planning



# Building an Onboarding Program

## Caution!

Onboarding eases a new employee into their position & the organization.

Space out onboarding tasks into digestible bites and start with tasks that are manageable and attainable.



# Building an Onboarding Program

## Step 4 – Celebrate, Evaluate & Revise

Early recognition goes a long way – celebrate the onboarding milestones! Include opportunities to solicit feedback from new employees (check-ins, survey's, feedback loops) and ensure the opportunities provide meaningful data.





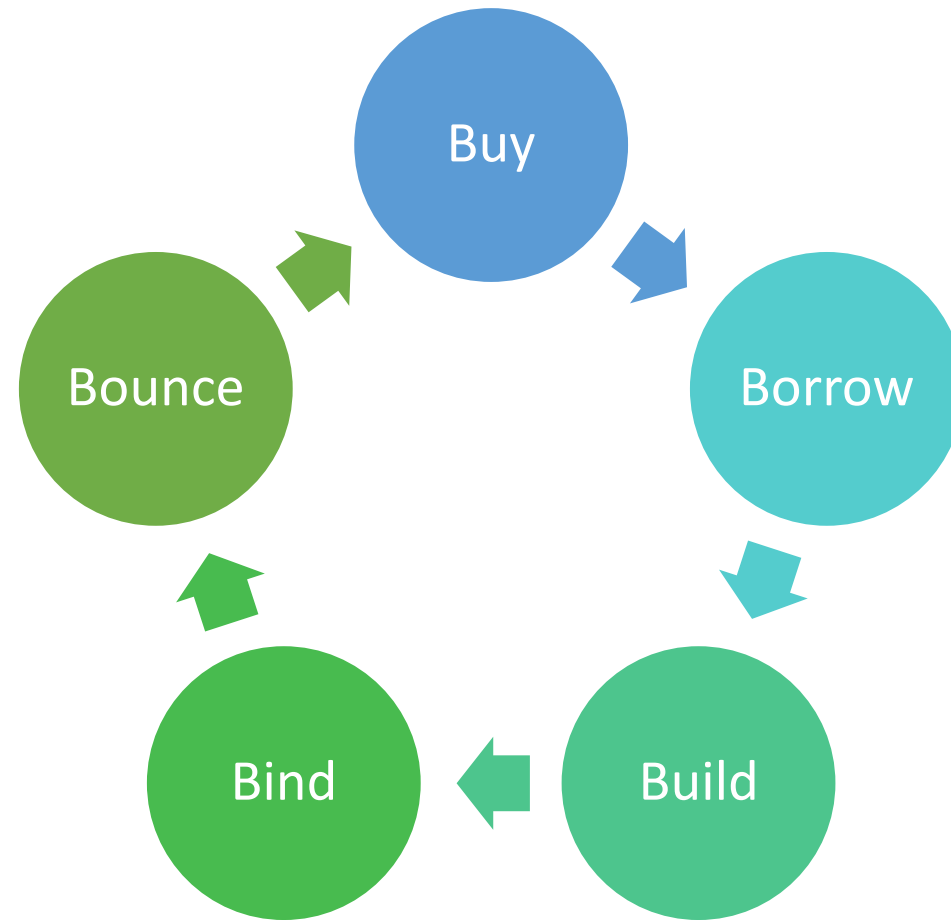


# Onboarding & Strategic Workforce Planning

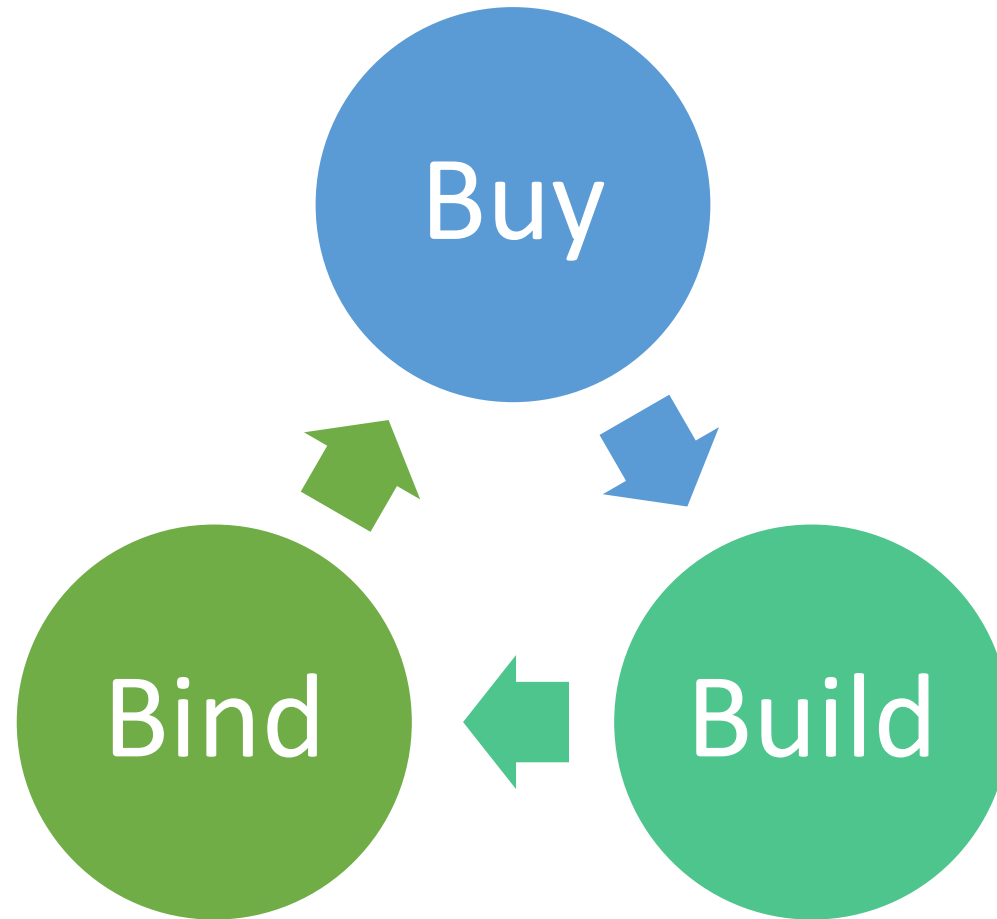


A workforce strategy is the sum of actions taken to acquire, retain, develop, motivate and deploy human capital in the service of an organization's mission.

# Onboarding & Strategic Workforce Planning



# Onboarding & Strategic Workforce Planning





# Onboarding & Strategic Workforce Planning



Buy

## Acquire Talent

- Fill a position needed for business operations.
- Obtain needed skills, knowledge or competencies.
- Obtain talent for future needs.

# Onboarding & Strategic Workforce Planning

## Develop Talent

- Coaching & Mentoring
- Formal training
- Project involvement
- Job rotation



Build

# Onboarding & Strategic Workforce Planning



Bind

## Retain Talent

- Invest in higher knowledge, skill, and competency development.
- Prepare for newer and challenging roles.
- Given effective incentives for retention.

# Onboarding & Strategic Workforce Planning

Buy, Build, and Bind are integral parts of the Employee Lifecycle.

Onboarding aligns to a strategic plan by integrating new employees into the organization and making them crucial stakeholders in the organization's mission.

## Employee Lifecycle



*Photo Credit: Steven AJ Cox*

# Onboarding & Strategic Workforce Planning

## Outcomes of a Workforce Strategy

- Longevity (Long-game – Industry relevance & brand)
- Competitiveness (Industry leadership)
- Sustainability (reducing costs, maximizing resources, brand awareness)
- Adaptability (adjust to changing, often uncontrollable conditions)

## Employee Lifecycle



Photo Credit: Steven AJ Cox

# Onboarding Final Thoughts

Onboarding should be intentional about integrating ALL employees.

- Experience  $\neq$  Integration
- Irrelevance of Position
- Return Employees
- Generational and Cultural Differences





**Thank you!**