Effective Onboarding

Building an Onboarding Program for Employee & Organizational Success

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UNT SYSTEM™
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?

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

12

of new employees feel prepared and supported after onboarding.

29%

The cost to onboard a new employee.

$4,400
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.

Wynhurst Group
The Good News on Onboarding

A quick integration in the company culture: 79%
A positive attitude towards the employer: 78%
A positive candidate experience: 78%

Talamundo, 2022
The Good News on Onboarding

- An increase in engagement: 73%
- A clear understanding of performance expectations: 54%
- A decreased time to proficiency: 51%

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.
# The Purpose of Onboarding - Integration

<table>
<thead>
<tr>
<th>Organizational Expectations</th>
<th>Gap</th>
<th>Employee Experience</th>
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<tbody>
<tr>
<td>Fast integration into company culture</td>
<td></td>
<td>Clear duties &amp; expectations</td>
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<tr>
<td>Clarify responsibilities of role</td>
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<td>Proper time for training</td>
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<td>Interpersonal connection with Co-workers</td>
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<td>Reduce time to contribution/competence</td>
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<td>Guidance from the manager</td>
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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

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<th>Employee Experience</th>
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<td>Unclear duties &amp; expectations</td>
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<td>Lack of time for training</td>
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<td>Socialization with colleagues</td>
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Effective Onboarding - The 4 Cs

Culture
Connection
Clarification
Compliance

The 4 C's

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

Support Structures → Training → Coaching & Support → On-Going Support & Development

Selection + Self-Efficacy + Role Clarity + Social Integration + Knowledge of Culture = Successful Onboarding

Stages of Adjustment

SHRM Foundation
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

<table>
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<tr>
<th>What</th>
<th>Needs to be done</th>
<th>Benefits overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who</td>
<td>Is involved</td>
<td>HR – John Smith</td>
</tr>
<tr>
<td>Where</td>
<td>Does it happen</td>
<td>In-person/hybrid</td>
</tr>
<tr>
<td>When</td>
<td>Date &amp; Time</td>
<td>Every third Tuesday at 10am</td>
</tr>
</tbody>
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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

All employees are an integral part of how an organization fulfills its mission, manages business operations, and brings value to their customers.

How do we think onboarding fits in workforce planning?
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

- Buy
- Borrow
- Bind
- Build

Bounce

UNSYSTEM™
Onboarding & Strategic Workforce Planning

Buy

Bind

Build
Onboarding & Strategic Workforce Planning

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.

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)
Onboarding Final Thoughts

Onboarding should be intentional about integrating ALL employees.

• Experience ≠ Integration
• Irrelevance of Position
• Return Employees
• Generational and Cultural Differences
Thank you!