

WHAT WORKS IN  
TALENT DEVELOPMENT

| Effective Onboarding

Norma Dávila and  
Wanda Piña-Ramírez





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PRESS

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*...because we grew with you.*

*...because you imprinted every single one of these pages.*

*...because now we know “What Works” in onboarding.*

*This book is for you.*



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# About the Series

ATD's What Works in Talent Development series addresses the most critical topics facing today's talent development practitioners. Each book in the series is written for trainers, by trainers, and offers a clear and defined pathway to solving real issues. Interwoven with the latest findings in technology and best practices, this series is designed to enhance your current efforts on core subject matter, while offering a practical guide for you to follow. Authored by seasoned experts, each book is jammed packed with easy-to-apply content—including job aids, checklists, and other reference materials—to make the learning transfer process simple.

The What Works in Talent Development series is a unique core collection designed for talent development practitioners at every career level. To date, the books in the series include:

- *Starting a Talent Development Program*
- *Blended Learning*
- *Effective Onboarding*



# Introduction

**O**nboarding is a business driver that ensures your company's new or new-to-role employees are the right fit. After employees are hired or brought into a new role, onboarding is the critical step connecting them with the organizational culture and their roles. In some cases, onboarding can be considered the first element of employee retention.

Employee onboarding is often misconstrued as a synonym for new employee orientation. Even though the second is part of the first, they serve different purposes in the employee's employment life cycle. Effective onboarding programs significantly affect employee engagement and employee branding, which is generally defined as how employees internalize the brand that the business showcases and align their behaviors and perspectives with it. Understanding the common misconceptions between employee orientation and onboarding is critical to defining the goals and scope of your own onboarding program. Clarifying these concepts will assist you as you build your business case and communicate to others why onboarding is important and how they can contribute to its results for every new and new-to-role employee.

Starting during recruitment and selection, employee onboarding is a more encompassing experience, crucial for both the employee and the business. Defining when onboarding starts will help you establish program timelines while securing the participation of the players, such as program facilitators, who add value to the program. Explaining what will happen and when will ease the transitions of those involved, which then benefits the onboarding program participants, hiring managers, and the business.

Companies need to know when the employee who participates in onboarding will be ready to become a productive business contributor. As you design or revise

your onboarding program—based on the results of your organizational analysis and supported with current best practices—you will be able to ascertain a more accurate program ending point, thus strengthening your position and your business case.

Time considerations are a critical element of program design. In the case of onboarding, program duration is not clear cut, although the process can take around a year. Therefore, understanding the nuances of onboarding programs will help allay unrealistic expectations about what the program will achieve and by when.

Another common misconception about onboarding is that it is the sole responsibility of the organization's human resources department when, in fact, it is a multipronged effort shared among different stakeholders at different times. Onboarding also is not limited to new hires. Research has shown that role clarification in onboarding, beyond the discussion of job descriptions and focusing on role expectations, is a critical factor for program success. Talya N. Bauer's 2013 survey of more than 12,000 new employees found that role clarification was one of the most important components of onboarding because it was related to employee performance. Her interviews, observations, and further research confirmed that role clarity is paramount for employee success.

Investing in onboarding is investing in employee success, which subsequently translates into investing in the business's future. Effective onboarding programs significantly increase and facilitate business results, employee engagement, and employee branding because they focus on how the employee's role contributes to move the organization forward and deliver desired outcomes.

Consider the following facts:

- According to a 2016 study by the Human Capital Institute:
  - » 78 percent of companies that invest in onboarding report the “continuation of a positive candidate experience,” 69 percent report “easier assimilation into the company culture,” 67 percent claim employees have a “clear understanding of performance expectations,” 61 percent found “increased engagement levels,” and 60 percent indicated “decreased time to proficiency.”
  - » 47 percent of those surveyed agree with the statement, “Our onboarding program speeds up time to proficiency for new hires.”
  - » 20 percent of new hires leave their companies within the first 45 days (Filipkowski 2016).
- A 2017 study among HR leaders in the United States conducted by Kronos and HCI found that:

- » Three-quarters of survey respondents believed onboarding practices were underutilized.
- » Nearly a quarter of organizations had no onboarding strategy or process for internal hires.
- » Just over a third of companies had insufficient technology to automate or organize the onboarding process.
- » 47 percent of those surveyed stated that onboarding programs were successful at retaining new hires (Filipkowski, Heinsch, and Wiete 2017).

Thus, establishing a solid, sustainable onboarding program makes sense for the future of the business.

## About This Book

*Effective Onboarding* describes how to design, implement, and evaluate an onboarding program; demonstrate its success; and sustain it for the future. Time is a valuable resource in every business because its use has a direct impact on profitability. This book aims to shorten the time that you need to design, revise, or expand your company's onboarding program. It is based on what we have learned as talent development practitioners about onboarding best practices from clients in diverse industries, cultures, and sizes.

Regardless of your role in your company's onboarding program—whether you are revising the existing program, expanding its scope to include internal promotions, or evaluating the current program's success—you will find valuable tools and information in these pages to meet your needs. Even if your company is satisfied with the results of its current onboarding program, you may gain a new perspective on what you could add or modify to make it even better as part of your company's continuous improvement efforts.

*Effective Onboarding* combines our experiences and the latest onboarding trends to create a single source where you can find examples, job aids, models, templates, and checklists of what you need to do to take immediate action to get results. We encourage you to read the entire book to gain a broad understanding of the onboarding process. We then suggest that you go back to those chapters that are particularly relevant for your own project. You could also tailor the tools and templates related to your current onboarding program's pain points to meet your needs. Thought-provoking questions are included to help you design, revise, or expand your own program.

Our examples and stories are based on real-life situations that we have encountered in our practice; they showcase best practices and pitfalls to avoid. The lists of additional resources will also help to expand your options as you work to address your program's specific needs.

## Chapter by Chapter Overview

Each of the books in the What Works in Talent Development series follows a similar framework. The chapters in this book discuss what onboarding is, why it's important, how to design it, how to implement it, how to evaluate the outcome, and what you can do to prepare for the future of learning.

**Chapter 1: Getting Started** describes what onboarding is and is not. It introduces the importance of employee onboarding for the organization and why businesses should onboard all their employees—whether they are new to the company or new to a role. After reading this chapter, you will be ready to identify the different potential audiences for your onboarding program, such as new and new-to-role employees, as well as the multiple stakeholders, such as senior management and boards of directors, who will participate.

**Chapter 2: Shaping the Future** highlights the impact of employee onboarding on organizations, discussing in detail the benefits of onboarding programs for the business, employees, and managers. After reading this chapter, you will be able to avoid the pitfalls that cause many onboarding programs to fail.

**Chapter 3: Designing Your Onboarding Program** takes you through the five phases of beginning to design your organization's onboarding program: assessing the current state, defining the desired state, analyzing the gap, closing the gap, and building the business case for onboarding. You will find guiding questions and templates to prompt your thinking and organize the information you collect for each phase so that you can make compelling arguments to support your recommendations about the onboarding program.

**Chapter 4: Implementing the Plan** takes the high-level design that you introduced in your business case into an actionable sequence of steps to revise or design your company's onboarding program. The chapter describes what to include to address the need that you defined during your organizational snapshot and gap analysis, whether your program is for new or new-to-role employees. You'll learn about different onboarding situations, such as for an individual contributor, manager, executive, or remote employee. You will also see how to use and adapt tools for your

program—such as criteria to select buddies, mentors, and external coaches as well as sample letters and agendas—for general and role-specific onboarding.

**Chapter 5: Transferring Learning and Evaluating Results** describes the importance of measurement and evaluation, and how you can use return on investment (ROI) among other indicators to justify and sustain your program. You will be able to make any changes to the program that the business may require based on the information that you collect and analyze. We also explain the difference between the terms *measure*, *measurement*, and *evaluation*, which are often used interchangeably. At the end of the chapter, we suggest measures that you may use for your program.

**Chapter 6: Planning Next Steps** discusses program sustainability, which is the next step in reinforcing the importance of onboarding for the business. This chapter considers additional barriers to program success, such as underestimating the employee’s learning curve and lack of support, with specific recommendations about how to overcome them. Included are examples of professional development activities that you can implement to keep onboarded employees on a continuous development path.

Given this book’s brevity and its complex topic, we are assuming that you:

- are familiar with the ADDIE model and the Kirkpatrick evaluation framework
- have knowledge about recruitment and selection
- are aware of company expectations about new employee performance
- understand the business strategy
- can work easily with different company levels
- know about employee engagement
- understand organizational learning and transitions
- know about your company’s approach to employee socialization
- know about SMART goals
- can deliver different types of messages
- are at ease managing different types of technology
- are comfortable giving and receiving feedback.

## Icons Used in This Book

Throughout this book, you will find icons highlighting concepts and ideas introduced in the text.

Icon	What It Means
	<b>Tips From Professionals</b> will make your job easier and give you ideas to help apply the techniques and approaches discussed.
	<b>Tools</b> identify templates, checklists, worksheets, models, outlines, examples, illustrations, and other prototypes that can be a useful place to start.
	<b>Resources</b> are the books, blogs, articles, or even people that you can access to add to the information you have gained already and take your learning deeper.

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## Additional Resources

- Bauer, T.N. 2013. *Onboarding: Enhancing New Employee Clarity and Confidence*. SuccessFactors Whitepaper. [www.successfactors.com/en\\_us/download.html?a=/content/dam/successfactors/en\\_us/resources/white-papers/onboarding-employee-clarity-confidence.pdf](http://www.successfactors.com/en_us/download.html?a=/content/dam/successfactors/en_us/resources/white-papers/onboarding-employee-clarity-confidence.pdf).
- Filipkowski, J. 2016. *Onboarding Outcomes: Fulfill New Hire Expectations*. Human Capital Institute, June 22. [www.hci.org/hr-research/onboarding-outcomes-fulfill-new-hire-expectations](http://www.hci.org/hr-research/onboarding-outcomes-fulfill-new-hire-expectations).
- Filipkowski, J., M.F. Heinsch, and A. Wiete. 2017. *New Hire Momentum: Driving the Onboarding Experience*. Signature Series, an HCI Insight Partnership. [www.hci.org/files/field\\_content\\_file/2017%20Kronos\\_0.pdf](http://www.hci.org/files/field_content_file/2017%20Kronos_0.pdf).
- Maurer, R. 2015. “Onboarding Key to Retaining, Engaging Talent.” SHRM, April 16. [www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/onboarding-key-retaining-engaging-talent.aspx](http://www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/onboarding-key-retaining-engaging-talent.aspx).
- . 2018. “Employers Risk Driving New Hires Away With Poor Onboarding.” SHRM, February 23. [www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/employers-new-hires-poor-onboarding.aspx](http://www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/employers-new-hires-poor-onboarding.aspx).





# 1

## Getting Started: What Is Onboarding?

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### **In This Chapter**

- Defining onboarding
- Clarifying the differences between orientation and onboarding
- Importance of onboarding
- Stakeholders of onboarding

**T**alent development professionals sometimes tell us that new employees complain about not getting the resources they need to succeed or that their expectations did not match the reality of the organization. Others have said that new employees left their organizations because they were confused about what they needed to do. We also hear complaints from managers about new employees not being the right fit or not being capable enough for the challenge that they were expected to meet. What went wrong? These employees probably never went through the right onboarding, or there was a mismatch between the onboarding program and their reality.

## What Is Employee Onboarding?

Employee onboarding is the process through which companies engage new employees or new-to-role employees in the company's culture and with their role. This process is designed to ease the movement of employees through the organizational threshold to become productive contributors and team members in the least possible time. Onboarding's influence on employee performance is company-wide. Therefore, it is directly connected to business outcomes and warrants a sizeable investment in resources.

Onboarding has two distinct yet complementary components: general onboarding and role-specific onboarding. General onboarding is more prevalent than role-specific onboarding.

- **General onboarding** introduces the employee to the company's culture (how things are done) by establishing commonalities among all employees regardless of position, such as hourly employees, individual contributors, or managers. For instance, the company's history, vision, mission, and values, as well as overall policies, procedures, and dos and don'ts are relevant to everyone. Specialized training sessions required for all employees, such as how to complete human resources transactions or fill out a timesheet, are also part of general onboarding. This component of the process establishes the ground rules to engage newcomers with the workplace.
- **Role-specific onboarding** entails a uniquely tailored process for each position in the company because it seeks assimilation of the new or new-to-role employee into the nuances of the department's or unit's culture. This component helps the employees acquire the knowledge, skills, and behaviors they need to master the role effectively and efficiently and feel at ease performing at the expected levels in the shortest possible timeframe.

Regardless of industry or company size, activities are highly individualized for each position and require a transfer of knowledge from the learning and development function to the manager or immediate supervisor, who will lead the process from that point.

## Origins of Onboarding Programs

As organizations and jobs became more complex, businesses realized that they needed to provide a starting point for their employees, whether new to the company or new to their roles, to perform their jobs. Companies began experimenting with different practices until they found what seemed to be effective for them. Some based those practices on organizational socialization approaches, which, according to Georgia T. Chao (2012), is “a learning and adjustment process that enables an individual to assume an organizational role that fits both organizational and individual needs.” In other words, it is what the company does to help a new employee acquire the required behaviors to succeed within the company and adjust to its culture and their role in it.

The preferences of the company’s country of origin may also influence how companies refer to activities such as new hire training, new employee assimilation, employee adjustment, or employee induction. However, *onboarding* is the most commonly used and accepted way in businesses to refer to these processes today.



### PRO TIP

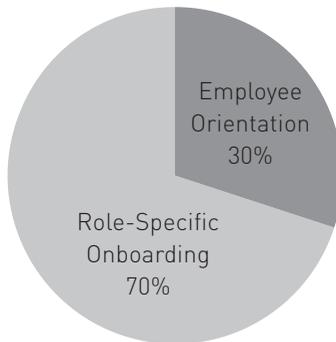
Make sure that managers know the difference between socialization into the organization and socializing in the organization.

## Differences Between Employee Orientation and Employee Onboarding

Orientation and onboarding jointly set the stage for the journey across the employee life cycle. One is the beginning of the other, and both create that fundamental first impression. You need to make onboarding matter, regardless of the type and size of your business. Employee orientation should be part of the employee onboarding process (Figure 1-1).

Figure 1-1. Relationship Between Employee Orientation and Role-Specific Onboarding

---



The following two examples illustrate the differences between employee orientation and employee onboarding:

### Marcia's Story

Marcia joined the sales team of a major telecommunications corporation after having a successful career as a sales representative for a global pharmaceutical manufacturing company. She has seven years of experience in direct sales and was enticed by the challenge of starting in a new industry. Her new employer has a solid reputation for its customer service approach and high-quality products. Marcia eagerly accepted the offer, which included a significant salary increase and benefits.

Marcia arrived at the company's main office ready to start the next stage of her career. To her surprise, her new manager was out of town. After she waited in the lobby for about an hour, the human resources representative who recruited her brought the paperwork she needed to complete before she could start. Marcia spent about two hours reading and signing documents. When it was time for lunch, someone told her to go find something to eat on her own. When she returned, she attended a four-hour group session, where she heard several talks about the past, present, and future of the company, as well as the rules that all employees needed to follow. At the end of the session, she received an employee handbook and information about company policies. She was also told to report to a general sales training the following morning.

The telecommunications company did not provide onboarding; they only provided a general orientation. Marcia felt lost.

### Justin's Story

Justin accepted an offer to become supervisor of a consumer credit call center. Justin had previously worked as a call center supervisor for a medical insurance company. His new job requires him to supervise a team of 35 employees who collect payments from customers or obtain commitments to pay. Justin learned as much as he could about his new company from its website and industry-related publications as well as from the interview process, where someone was always ready to answer his questions. He completed all the paperwork related to his new position before his first day.

When Justin arrived at his new workplace, the receptionist greeted him by name and so did other employees who happened to be there. His manager introduced Justin to his new team and spent the rest of the morning discussing the schedule for the week. Justin learned that he would attend a general orientation session with other new employees followed by a customized monthlong program that his manager would facilitate to ensure his assimilation into the company and his role. He received a welcome letter from his colleagues, his ID was ready for him, the T-shirt he was given to wear at the company's gym was the correct size; he also received an invite to join any of the company's social responsibility groups. Justin felt supported and valued in the organization; he had a clear sense of direction about where he was going in the company from the start.

Marcia and Justin had two completely different experiences during their first day at their new organizations. Marcia received a typical new employee orientation, one full of information and paperwork instead of an onboarding process. Her experience illustrates what companies should not do. In contrast, Justin had a planned formal experience that was tailored to meet his needs and directed at his integration and success. His new organization was ready to receive him and focus on what really matters.

Marcia's first day at work involved completing forms and signing documents that, although important and often required by law, did not contribute to her understanding of the company or her role. The facts, figures, and rules presented in the group session were all useful to know; however, unless they are placed in the proper context, they do not add value to the new employee's development. Further, the absence of her manager and the requirement to attend a general sales training session, despite being an experienced salesperson already, turned an otherwise noteworthy opportunity for the organization to create a positive first impression into one more event to be checked off a list. Marcia was required to attend the training session to comply with a requirement, regardless of her experience or what she could contribute. Her first day at work was memorable because it was uninspiring.

In contrast, Justin completed administrative tasks and started building relationships with his new manager and fellow employees before his first day. He felt welcomed upon arrival and immediately began to build on his rapport with his manager through their formal and informal conversations about the plans for the next month. Meeting his new team and later attending group sessions initiated that important integration process into the company culture. Learning that the organization had an individualized program in place that valued his background and his potential to contribute to the organization provided a sense of belonging and engagement that cannot be overlooked.

## Different Types of Programs to Serve Different Purposes

The programs that organizations offer to their new employees vary widely. While some are as short term and general as Marcia's, others are more customized like Justin's. While many organizations refer to these programs as new employee orientation or new employee onboarding interchangeably, Marcia's and Justin's examples illustrate how distinct the two experiences are and the very different objectives they achieve. Marcia's experience is best described as a failed attempt at an employee orientation; Justin's is a good example of a successful employee onboarding program.



### RESOURCE

In *Creative Onboarding Programs: Tools for Energizing Your Orientation Programs*, Doris M. Sims introduces examples of what businesses are currently doing to onboard their employees. Check it out to see if some of the examples could be useful for your program.

## Employee Orientation

Employee orientation is a time-bound single event where most organizations assume that “one size fits all,” often bringing together employees who perform different roles and functions whose main commonality is their effective date of hire. In these group sessions, led by L&D, a senior manager usually welcomes attendees either in person or using video or teleconferencing technology. L&D then leads the rest of the agenda, with appearances from human resources and other departments. In the absence of L&D, HR or the company's owners lead this process.

Employee orientations are usually structured as a series of separate presentations that, among other topics, highlight the company's history, present, values, and culture, as well as its vision for the future. These presentations, often held in classroom-type settings, are usually laden with policies, rules, and regulations employees must follow, along with the implicit message that they must do so to remain employed. Many companies integrate the use of technology in these orientations and even deliver some content through customized company apps. Sometimes attendees can complete paperwork or receive training about how to conduct transactions, such as requesting direct deposit of their wages, signing up for savings and retirement programs, or designating beneficiaries for life insurance. Orientation programs vary in duration from several hours to several days and are increasingly delivered online. However, there is no substitute for direct personal contact—studies, such as those of Wesson and Gogus (2005), show that employees assimilate less and have less understanding of the company and the job when they receive only computer-based versions of onboarding.

Although useful, the information conveyed during employee orientations is, by design, far too general and only minimally achieves the goal of facilitating a new employee's transition to becoming an effective business contributor. Even though attendees value the opportunity to meet fellow employees, they object to information overload as well as the lack of information specifically related to their own roles. Therefore, when these employees arrive at their units, they have another "first day."



**PRO TIP**

Ensure that employee orientation is relevant to the employee's level in the organization by providing examples of situations that are commonplace for the attendee's level. Schedule separate sessions for exempt and nonexempt employees.



**PRO TIP**

Make your company's history real by providing examples that add value to the onboarders' experience. Asking them to read the information from a website is not enough.

## Pre-Onboarding

Pre-onboarding comprises all the activities that take place before the new employee or new-to-role employee receives the employment offer. The organization's recruitment and selection activities are part of this component.

Pre-onboarding includes many steps and actions:

- Employee accepts employment offer letter.
- The employee receives additional information about the company.
- Paperwork related to the hiring process is completed.
- The company requests any necessary uniforms and personalized equipment for the employee.
- The arrival of the new employee is announced.
- The employee receives information prior to arrival to know what to expect.
- The company sends a welcome packet to the employee.
- The employee meets other employees informally.
- The employee starts becoming familiar with the new company's culture.



### TOOL

The Pre-Onboarding Checklist located at the end of this chapter is useful to ensure completion of pre-onboarding tasks.

## General Onboarding

Organizations begin to create that emotional connection between the employee and the company's purpose by discussing the company's mission, vision, and values and, most important, making them come alive for employees. When employees can relate to the company's mission, they construe their relationship with the organization as a more personal one. When they are aware of the company's vision, they see a future for themselves in the company. When their values and those of the company are congruent, employees do not experience the cognitive dissonance that often leads them to seek opportunities elsewhere.

Each company's culture, which defines how the business does what it does, is unique, and each locality within a company has its own culture. For example, subtle cultural differences between departments often exist within a company. Employees need to under-

stand the company's culture because everything they do as well as how others perceive and reward what they do is embedded within that culture. Therefore, they need to grasp those critical written and unwritten cultural rules as soon as possible to be successful.

Company brand, which is the essence of what the company stands for internally and externally and how it differentiates itself from the competition, is often one of the factors that attracts a candidate to an organization. Thus, the company's internal and external brands must be aligned—any discrepancies between them may influence an employee's decision about staying or leaving. Employees represent the company and its brand everywhere they go and in everything they do. In today's culture, anything can get posted on social media, and a single incident can make or break a company's or an employee's reputation, so creating that awareness of the company's brand from the beginning gains additional significance.

The size and scope of the company's market, the group to whom the organization delivers its goods and services and its distinguishing characteristics, influences whether employees can see the impact of what they do locally, nationally, or internationally, and how they envision the company's competitors. The size and scope of the market also affect the complexity of the organization, which, in turn, may affect the complexity of the employee's role and potential career path.

When employees can visualize the end users of the products and services their companies offer, they become more personally invested in those products and services as well as in how they see themselves representing the company and the brand. Thus, introducing employees to the company customer base defines the company's market even further.

The company's organizational structure serves to guide how they function internally by delineating reporting relationships and spans of control. In its graphic form, the organizational structure portrays the complexity of the business, the formality of the company, and the options for career mobility. Often presented as a living document, the organizational structure is another mechanism for showing employees where they fit within the business and linking the names, positions, and, possibly, faces of those with whom they will interact more or less frequently.

## **Role-Specific Onboarding**

Role-specific onboarding provides an employee multiple opportunities to assimilate into the department's or unit's culture and master their new role.

General and tailored learning experiences allow employees to acquire specific tech-

nical skills and competencies unique to the new role. Companies may use a specific approach or a combination of approaches, such as traditional classroom training, on-the-job training, industry-specific publications, online courses, just-in-time learning tools, job shadowing, simulations, in-house or external academies, professional conferences, and immersion programs, as well as mentoring and coaching.

When employees attend company events, participate in meetings, partake in learning experiences, are present in the office, join internal and external client meetings, and interact informally with others, they expand their company networks as they initiate and build relationships with their manager or supervisor, peers, direct reports (if applicable), colleagues, and clients. By becoming members of professional organizations, they interact with other professionals in different settings while keeping their expertise up-to-date.

It is also important for employees to observe how their managers, supervisors, peers, direct reports (if applicable), colleagues, and clients communicate and interact with one another to learn about any unwritten rules that are crucial for a smooth role and cultural transition. Building an open and honest relationship with a buddy or mentor is a priceless way to gain additional insights into “how we do and don’t do things around here,” whether the employee just joined the organization or has moved to a completely different role that requires a different set of behaviors.

An onboarding program allows employees to grasp the magnitude of the company and its culture in general terms and to find their place in the company. Through onboarding, employees also find out how they fit in their department and how they can contribute to their department and to the business.

When defining the scope and duration of your organization’s onboarding program, consider these factors:

- **Company industry.** Those industries that are highly regulated, such as banking, insurance, pharmaceutical manufacturing, construction, and hospitality, must abide by mandates and decrees that demand the inclusion of specific content in onboarding programs. Some industries, such as aeronautics manufacturing, do not allow employees to perform their jobs until they have undergone extensive training, demonstrated they can do the work independently, and been certified by an expert.
- **Company culture.** Culture can vary from very formal to *laissez-faire*. In formal company cultures, employees often have to follow a predetermined linear path and complete their onboarding within a particular timeframe; *laissez-faire* cultures often allow employees more flexibility to complete or

even choose their programs. Learning about a formal company culture where employee behavior is completely prescribed will take longer than learning about an informal company culture where employees are encouraged to experiment and learn. Mistakes are not an option and can be costly within a formal company culture, while they may be encouraged in an informal company culture.

- **Reporting relationships.** These determine how employees interact with their supervisor or direct reports, and are easier to deal with when employees and supervisors are in the same place at the same time. However, employees may report to supervisors in a different location; if their contact is mostly electronic, they may rarely meet. Virtual or remote employees and supervisors have to define a different way of working and addressing issues than employees and supervisors who work in the same office. In onboarding, particularly in role-specific onboarding, companies should spell out the nuances of how to deal with these differences, as well as how to anticipate any potential roadblocks to success, because reporting relationships are so important to employee engagement, retention, and success.
- **Employee background.** This may be defined in demographic or educational terms. An organization needs to make sure that employees can work as part of a diverse workforce. Similarly, an organization has to account for any differences in educational level and the potential impact on employee interactions—between peers, between employees and supervisors, or among employees and supervisors with other levels of management—when tailoring role-specific onboarding to clarify all roles and relationships. For example, they need to determine the complexity of language and use of jargon, as well as the level of formality in alignment with company culture, depending on role and employee background.
- **Employee experience.** Components of role-specific onboarding have to acknowledge the employee's level of experience in terms of industry, role, tenure, and location as they relate to the position and expectations of the role. For example, the company's intention in selecting Candidate A, who has less experience in X, over Candidate B, who has more experience, has to be clear from the beginning. Very likely, Candidate A's learning curve will be steeper than Candidate B's unless Candidate A's hiring responds to other compelling business needs that obliged the company to hire them

based on potential rather than performance. This example is based on our experience: Sleep polysomnography technicians must have a degree in respiratory therapy. However, earning the degree does not make you a sleep polysomnography technician. Therefore, if Candidate A has a degree in respiratory therapy but has never worked in a sleep laboratory, and Candidate B has the degree and worked in a sleep laboratory for five years, the onboarding for Candidate B will be shorter than that for Candidate A.

- **Role complexity.** Straightforward repetitive roles, such as many of those in manufacturing operations, typically require less time to master than roles calling for independent judgment, such as many of those within business planning and forecasting departments.
- **Multiple players.** Typically, an onboarding program will last between a month and a year. As the program's designer, you need to orchestrate the seamless involvement of multiple players over time. These include L&D, HR, company management (including top management), and the employee's manager.



## RESOURCES

"Strategic Onboarding: Transforming New Hires Into Dedicated Employees" by Kim Lamoreaux (2008) presents a model where new employee orientation is called a checklist and managed by HR, onboarding is a process managed by the training function, and strategic onboarding is an experience managed by the business function.

The U.S. Army's Acculturation Onboarding Model (2014) takes you through an onboarding program that starts before the first day and takes up to a year. It specifies the responsibilities of the employee and the commander, but can be adapted to nonmilitary settings.

## Who Should Undergo Onboarding?

Onboarding allows organizations to facilitate role transitions for employees who are entering another stage within their employee life cycle. At first you may think that these programs should be geared toward those who join your company for the first time. However, new-to-role employees at most levels of the organization should also undergo onboarding; just consider their tenure in the company when deciding in which program components they should participate. For instance, people who have been working for the

company between three and five years do not need to attend new employee orientations unless the company has undergone a major change; the same is true for employees at the executive level because they establish business policy and direction. In contrast, those new-to-role employees who have been in the company for more than five years should attend new employee orientations and experience role-specific onboarding, because the circumstances under which they assume their new role vary considerably. The programs that you design for both groups of employees need to consider their similarities and differences. Let's look at these groups and their unique traits.

## **New Employees**

A company's new employees may come from another company in the same industry. For instance, a person who worked in an auto dealership is starting work at another dealership. In this case, the employee's onboarding would emphasize products and customer profiles. Another example would be a university instructor who received an offer to teach at another university; the instructor's onboarding would focus on the university's mission, values, and culture, delving into the particular profile of the department and its students.

In contrast, new employees may have worked in different industries and acquired highly transferable skills over the course of their careers. For instance, an auditor whom you just hired to work at a food and beverages company started in banking, moved to insurance, and then moved to telecommunications. Because the tasks and responsibilities of each of these roles are likely to be similar, at each new job, this person's onboarding experiences will mainly target the applicable rules and regulations for each industry.

Today's workforce is highly mobile, not only nationally, but internationally. Therefore, an employee who had a managerial position in Austria may accept a comparable managerial position in the United States, whether these are in the same or different industries. If the position is in the same industry, then the onboarding would target the similarities and differences between companies, highlighting culture. If, in contrast, the position is in another industry, the new employee would need to spend more time learning about the industry and the position of the business within that industry.

Today's career paths are not as linear as they used to be because organizations have become flatter to become more efficient. Traditionally, when employees received promotions, it was often based on their potential to perform at a different level of responsibility. Although they may have had the potential, they still needed to develop the competencies and skills necessary to perform their new roles and acquire the under-

standing of how to handle their new responsibilities on an interpersonal level. However, with fewer opportunities for upward mobility, more employees are accepting lateral changes for job enrichment and to prepare them for other positions in the future, whether in the same or another company. In other instances, employees are demoted to a lower-level position because the business needs have changed, their positions have been redefined, or the positions demand a different skill set. Promotions, demotions, and lateral changes can also occur in different countries, which often affords opportunities to broaden an employee's perspective and prepare the individual for the next position somewhere else.

In addition, some employees become known as experts in an industry. Many times, these employees are courted by different companies because of their expertise, often for different roles. For instance, a salesperson may become a sales executive and later an account executive. Then another company offers them a supervisory role, and yet another offers them a managerial opening. In this case, the onboarding has to emphasize knowledge of the company and of the role rather than that of the industry.

Other professionals may hold different positions in different industries. For instance, someone in marketing who started as an analyst for a chocolate manufacturing company can have a senior analyst position at a telecommunications company, move to a supervisory position in software development, and accept another senior analyst position at a news media outlet to gain additional experience. In this case, the employee's onboarding would entail learning about the industry, the company, and the specific role in each move.

## **New-to-Role Employees**

The experience of new to role employees in your company may involve a promotion when an employee is offered and accepts a position of more responsibility, which may or may not entail supervising or managing others to achieve company goals—as is the case of highly technical positions where career progression can be achieved while maintaining status as an individual contributor. For example, a recent graduate with an engineering degree following a technical career path may start as an engineer and later be promoted to senior engineer, principal engineer, and senior principal engineer. In contrast, a recent graduate with an engineering degree following a managerial career path may start as an engineer and later be promoted to senior engineer to then become manager, senior manager, and director.

Demotions occur when an employee, because of performance, business, or development reasons, goes to a position of less or different responsibility. A demotion can be one

way to learn about a different function within your company to be ready for another role or to satisfy an employee's temporary or long-term personal need or time commitments.

Lateral changes take place when an employee begins to perform a similar role in another department or function. In this case the employee brings an understanding of the role and general skills and competencies required; however, the employee still needs to become familiar with the department or function and its culture, as well as the subtleties of performing the role within that context.

While deciding which components to include in your onboarding program for new-to-role employees, remember to keep the length of their tenure in the organization in mind. Also, consider if they have executive status when making those decisions (Table 1-1).

Table 1-1. Onboarding Program Components for New-to-Role Employees

New-to-Role Situation	Program Component	
	New Employee Orientation	Role-Specific Onboarding
Promotion	Depends on Tenure and Executive Status	Yes
Demotion	Depends on Tenure and Executive Status	Yes
Lateral Change	Depends on Tenure and Executive Status	Yes
Relocation	Yes	Yes
Perform Work at a Location Different From Where They Report	Yes	Yes
Change in Reporting Location	Yes	Yes
Background in Comparable Role	Depends on Tenure and Executive Status	Yes
New Career Path	Depends on Tenure and Executive Status	Yes

Relocated employees may perform the same role or a different one under conditions of promotions, demotions, or lateral moves; therefore, their onboarding will have to address issues associated with the relocation in addition to those related to the change in responsibility level.

Employees may be working in a location different from where they report when they produce their deliverables. In addition, their supervisors may be assigned to another facility, which could be within or outside the country where the employee is based. In this case, the role-specific onboarding has to address any work-related issues

caused by the changing locations, as well as those pertaining to working under these supervisory conditions.

Or perhaps an employee has a background in a comparable role from previous experience at another company. While they were hired to do a different job at your company, they're now going to take a position that resembles the role performed previously. Even though this employee's previous experience in a similar role is valuable, you cannot assume that the role in your company is the same as their previous role because it was at another company, at another time, and under different circumstances. Therefore, you should discuss those differences but without disregarding the value of that history.

## New Career Paths

A new career path begins when an employee initiates a different professional trajectory within the company in a new area of the business, either because the employee requested it to explore other options and areas of interest or because the company decided the employee's skill set was a better fit for that area. For example, someone who has held different roles in human resources embarks on a career path in marketing. Regardless of whether the role represents a promotion, demotion, or lateral move, this employee has to master the functional and cultural features of this new career path.

Let's consider the following situation.



### Beatrice's Story

Beatrice started in Blanket Corp. as a manufacturing operator. Eager to learn and acquire new skills, she quickly mastered how to use and troubleshoot the equipment in her unit. Even though it was not part of her formal role, Beatrice began to support new employees when they were assigned to her unit. Her supervisors took notice of her leadership skills among her peers and promoted her to supervisor. Because she was such a natural leader, and had been at Blanket Corp. for more than 10 years, no one thought to provide role-specific onboarding for Beatrice. She was left completely on her own to figure out what to do.

Beatrice struggled with the transition as well as the new responsibilities that accompanied her role, such as being a role model for her employees, handling company politics, communicating constantly with her employees and other management levels, and using company systems for transactions related to her new role and employees.

Beatrice made several major mistakes because she did not understand her role or how to interact with her former supervisor. She did not know the difference between exempt and nonexempt employees. She was unable to be a role model for her employees because she continued behaving as an employee instead of as a supervisor. In addition, her emails showed carelessness in thinking as well as writing.

Eleven months into her new role, her manager called her into her office to inform Beatrice of her termination.

Whose responsibility was Beatrice's unsatisfactory performance after a very successful track record as a manufacturing operator?

The company assumed that, because of Beatrice's performance and general skills, she would be able to perform a role that was new for her. Beatrice's example illustrates a common problem in organizations: Promoting an employee to a supervisor without appropriate onboarding or support eventually results in losing the employee, the supervisor, or other employees, and hurting the business.

Although Beatrice was willing and able to assume her new role and had been at Blanket Corp. for more than 10 years, the company where she initiated her career had changed. Thus, like anyone who starts in a new position, she needed to update her knowledge about different aspects of the company, gain a different perspective on it based on her new role, and obtain the necessary information to succeed. For all practical purposes, Beatrice, like any other employee who assumes a supervisory or managerial position, was a new employee who needed to receive role-specific onboarding.

Let's meet Ramiah.

### **Ramiah's Story**

Ramiah was a marketing manager at a waste management company. When the company decided to outsource the marketing function as a cost-reduction measure, she was offered a position as accounts payable analyst because of her background in accounting. This change represented a significant demotion for Ramiah; however, it was a better option for her than sudden unemployment. She agreed to stay.

When Ramiah's manager explained the business situation that led to the outsourcing decision, he allowed her to ask questions and granted her a week's leave to prepare for her new role. Meanwhile, her previous manager held several meetings with her peers and direct reports, communicating Ramiah's change in role and position and emphasizing how her background in accounting would allow her to contribute to the business.

When she returned from her leave, Ramiah found that her new supervisor had already planned an individualized onboarding program for her to learn about her new role and move forward. This was a very important step in her transition.

Ramiah was engaged and believed that she was set for success.

Beatrice's and Ramiah's companies handled their shifts into their new roles in totally different ways. Beatrice's company did not offer role-specific onboarding, while Ramiah's did. The combination of personal and company factors involved in these experiences led to completely different results.

Today's career paths are anything but linear—as organizations continue to flatten, career paths go upward, downward, and sideways. It is not uncommon for someone to take a lateral assignment or even a position that is one or more levels below their current one to gain valuable experience before their next move. Ramiah's example stretches our thinking about the need for onboarding beyond external hires or promotions. Her change in role demanded an individualized onboarding program just as much as anyone else's role transition. Although Ramiah's change is considered a step backward by many, it allowed her to use her background in a different way and remain with an organization where she enjoyed working. The way in which Ramiah's onboarding was handled allowed her to see this change as a temporary step from which to continue moving forward.

Other groups of employees who need to undergo onboarding are those who are relocating within a company in their home country or abroad.

### **Dimitri's Story**

Dimitri is the senior analyst at Mikka's and has been with the company for eight years. He recently learned that he is considered a high-potential employee, and his individualized development plan includes a transfer to the company's new office in Lima, Peru. To his advantage, Dimitri is fully bilingual.

Even though Dimitri's change entails a lateral move within the same company, he will be new to the role and to the company's operations in Lima. Because of the company's size and the frequency of this type of assignment, Mikka's has an onboarding program that begins before its employees arrive at their new assignment. The program includes a wide range of information about the company's operations in Lima, with plenty of opportunities to ask questions and connect with other employees before arriving to increase the likelihood of success.

After his manager announced his transfer to the Lima office, Dimitri visited the new office in Lima for onboarding several times before assuming his position. He received and read the company's country-specific employee handbook, met his peers and future team, and got a hands-on understanding of the culture of the company at that location as well as of the location itself. With the support of a local mentor, he learned about the business, office jargon, what to say, and what not to say, as well as how to handle radically different perceptions of time. By the time Dimitri started in his new role, he was ready to perform. He understood the role and the culture.

Dimitri's example illustrates an onboarding program that started several months before his role changed and required the involvement of multiple players over time. It reinforces how onboarding, like many other employee experiences, calls for the careful orchestration of the efforts of experts, facilitators, supporters, and stakeholders whose job is to ease that important transition for business success.

## Stakeholders of Employee Onboarding

Employee onboarding requires full responsibility from learning and development with the joint support of human resources, management, department heads, other employees, peers, and direct reports to deliver the employee value proposition that attracted candidates to the company in the first place. The manager enables the general and role-specific onboarding processes, and the new or new-to-role employee co-creates the onboarding process as an active participant in this stage of their career.

As you review their roles and responsibilities, consider preparing a matrix of all the activities and the decision-making authority associated with them in the form of a RACI chart (Responsible, Accountable, Consulted, and Informed). Such a chart will give you and the company a visual portrayal that will prove useful for rebalancing and reassigning responsibilities and tasks throughout your onboarding program.

Stakeholder role clarification in onboarding will pay off throughout the program's design and implementation, minimizing confusion and maintaining that positive impression on the new or the new-to-role employee. In turn, program participants

will benefit from the right combination of resources, expertise, and tenure brought to the table for them. Onboarding is one of the business's best practices for employees, managers, and executives.



### TOOL

The "RACI Chart Sample and Template" located at the end of this chapter is useful to visualize how the responsibilities and decision-making authority are distributed in your onboarding program.

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## Understanding the Big Picture

General onboarding addresses big-picture company topics. Role-specific onboarding tackles role definition in detail. Onboarding cuts across organizational levels with the involvement of multiple stakeholders along the way. How you handle relationships with those different stakeholders will influence the results of your program.

In the next chapter we will guide you through the many benefits of onboarding as a preparation for understanding your own program needs.

## Questions to Explore

- How does your organization define onboarding?
- Why is onboarding important to your organization?
- Who are the stakeholders of your onboarding program?
- Does your organization differentiate between employee orientation and employee onboarding?
- What is your company doing to ease the transition of new employees into the company's culture?
- What is the company doing to assist employees as they assume new roles and perform their new functions?
- What does the company do between the moment when new employees accept the employment offer and their first day?

- How does the company handle any differences in background during onboarding?
- How does the company address specific issues related to promotions, demotions, lateral moves, or transfers among employees who are assuming new roles during onboarding?

# Tools for Support

## Pre-Onboarding Checklist

Use this checklist to ensure completion of all pre-onboarding tasks.

<b>Employee Name:</b>				
<b>Department:</b>			<b>Position:</b>	
<b>Manager's Name:</b>			<b>Start Date:</b>	
<b>Completed by:</b>			<b>Date:</b>	
Item	Status			
	Not Completed	In Progress	Completed	Comments
1. Review employee's application to get acquainted with background				
2. Review job description for tasks and responsibilities				
3. Prepare customized orientation materials and documents				
4. Review onboarding schedule				
5. Verify accurate completion of documents, including signatures and dates				
6. Confirm that the following documents (if applicable by industry or position) are on file:				
a. Background check				
b. Reference check				
c. Form I-9				
d. Tax withholding forms				

Item	Status			
	Not Completed	In Progress	Completed	Comments
e. Drug screening results				
f. Emergency contact information				
g. Direct deposit authorization for payroll				
h. Benefits' enrollment				
i. Credit references				
j. Driving record				
k. Immunizations				
l. Noncompetition agreement				
m. Security information				
n. Employment at will				
7. Inform all relevant stakeholders of employee's arrival				

## RACI Chart Sample and Template

Use this chart to help you visualize how the responsibilities and decision-making authority are distributed in your onboarding program. Review the sample chart and then use the template to analyze your own program.

### Definitions:

- Responsible (R): who completes the work
- Accountable (A): who is ultimately accountable or who can say yes or no about the work
- Consulted (C): who gives feedback and contributes to the work
- Informed (I): who needs to know

Sample RACI Chart

Activities	Responsible (R)	Accountable (A)	Consulted (C)	Informed (I)
Collect exit interview data	Janice	Helen	Irwing	Layla
Analyze exit interview data	Janice	Helen	Frederika	
Report results of exit interview data	Janice	Helen	Frederika	Héctor
Identify key issues related to onboarding program	Helen	Helen		Alberto
Revisit onboarding program to address issues raised	Héctor	Alberto		

## Analysis

What are the data telling you? Look at the patterns. If someone has several Rs, this may not be realistic. If someone seems to be making every decision, these may be delayed. If several individuals need to be consulted about everything, question if their input is really necessary. Evaluate who needs to be informed, when, and how.

Use this blank chart to do your own RACI analysis.

RACI Analysis Template

Activities	Responsible (R)	Accountable (A)	Consulted (C)	Informed (I)

## Additional Resources

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