

Effective Onboarding

How It Can Lead to Increased Engagement and Decreased Turnover



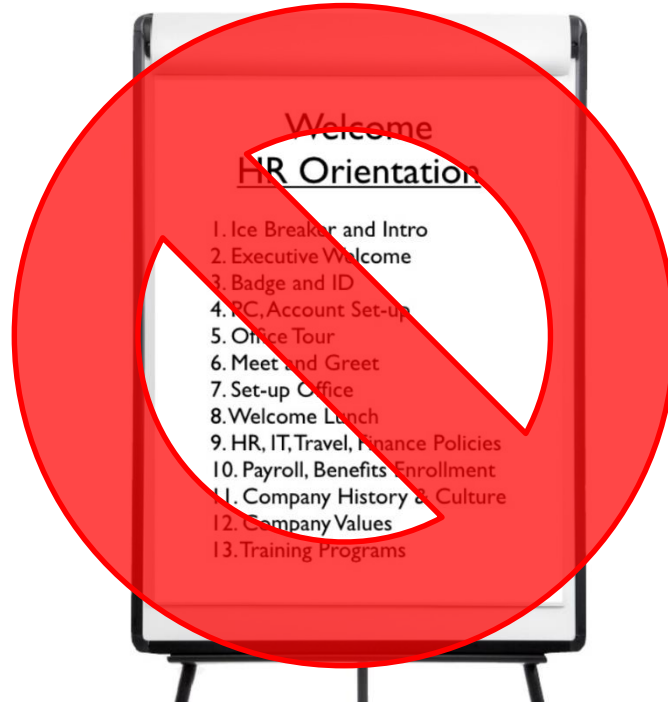
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January 25, 2018

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My First Job...



Onboarding: What it's not!



By The Numbers

70%

of new hires make the decision to stay or leave an organization within the first 6 months (HCI, 2012)

Formal onboarding increases the change of keeping a new employee for at least 3 years by (Aberdeen Group, 2013)

69%

25%

of all turnover occurs in the first 45 days (People Fluent Research, 2012)

Onboarding: What is it?

“**Onboarding** is the **process** or system that organizations use to **introduce, train, integrate** and/or **coach new hires** to the **culture** and **methods** of the **company** during their **first year**.”

~Lynn Schleeter, Director of the Center for Sales Innovation
The College of St. Catherine in Minneapolis, Minnesota

Effective Onboarding



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Is meant to:

- **Introduce** and **ingrain** company culture and way of working
- **Reaffirm** decision to join organization
- **Incentivize** new hires to do their best work
- **Reinforce** what new hire was told in recruiting phase
- **Develop, coach, and mentor** new hires
- Turn a great hire into a great employee

Impact of EFFECTIVE Onboarding

- **Organizations with best-in-class onboarding:**
 - **91%** of first-year employees were **retained**
 - **62%** met first performance milestones on time
 - Better Onboarding = Better Performance¹
- **Automation is a Best-in-Class Aid:**
 - Learning Management System
 - Electronic Paperwork¹
- **Onboarding and Learning Integration Drives Growth:**
 - **26%** of best-in-class organizations enroll new hires in **learning and development programs**¹

Hewitt and associates found companies who invested the most time and resources in onboarding enjoyed the highest levels of employee engagement.²

Onboarding includes:

- Company Mission and/or Vision
- Culture Assimilation
- Socialization
- Performance Standards and Expectations
- Resource Availability
- Skills needed to excel in job



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In order to have a
successful
onboarding program,
you must first have a
solid grasp on your
organizational
culture.



Question 2:

According the Bureau of Labor statistics, two generations ago the average person held six jobs in their lifetime. What is that number today??

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11+

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Benefits of a Strong Onboarding Program

For Employees

- Learn about company culture and job-related resources
- Start to build relationships and networks
- Align expectations of job and career goals
- Feel engaged and valued
- Become familiar and comfortable with job role

For Company

- Accelerate “Time to Perform”
- Improve employee retention
- Improve customer satisfaction
- Increase employee pride in company
- Improve overall level of engagement
- Increase visibility of new hires

Why do onboarding programs fail?



No one is directly responsible



Viewed as a checklist or
“orientation paperwork”



Limited management interest
or involvement



Material introduced is never
reinforced later

Onboarding Best Practices

- Accountability
- Consistency
- Automate what you can
- Don't start day 1 with new hire paperwork
- Involve leadership and management in the program
- Expand over 1st year of employment
 - Three part process:
 - Initial Onboarding Program
 - 30-60-90 Day Plan
 - Development Plan



Onboarding: Part I



We transitioned to electronic paperwork mid-2017

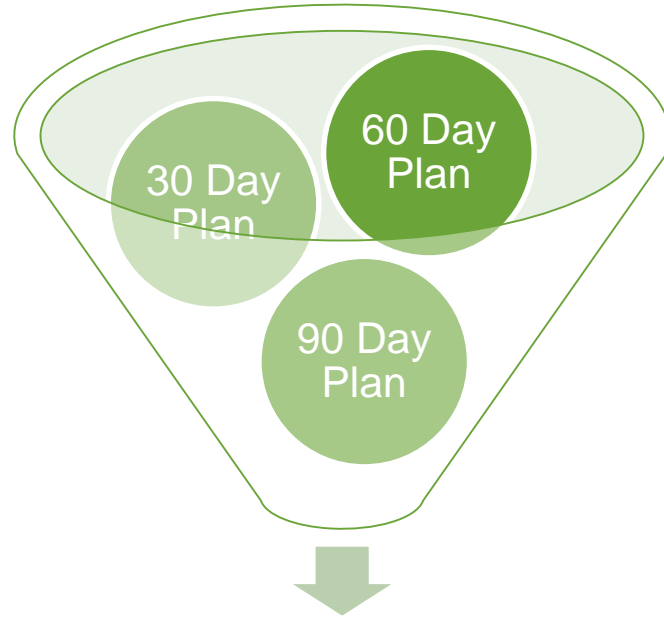
Monday		Tuesday		Wednesday		Thursday	
Time	Task	Time	Task	Time	Task	Time	Task
8:30 AM	Welcome, paperwork, PC setup & Expectations	8:30 AM	D1 Assessment	8:30a	D2 Assessment	8:30 AM	Day 3 Assessment
9:00 AM		9:00 AM	HHS Vertical Presentation	9:00 AM	Mid-week Review	9:00 AM	
9:30 AM		9:30 AM	Intro to Online Learning	9:30 AM	Bertelsmann Overview	9:30 AM	
10:00 AM	About Me Presentations	10:00 AM		10:00 AM	Survival Skills Activity (Strategic Thinking/Healthy Conflict/Commitment)	10:00 AM	Relias Review/Handbook Jeopardy
10:30 AM		10:30 AM	Relias Values Activity	10:45 AM		10:30 AM	
11:00 AM	Full Office Tour	11:00 AM		11:00 AM	Intro to Prof. Serv	11:00 AM	
11:30 AM	Insights Assessment	11:30 AM	Benefits/ADP	11:30 AM	SRC	11:30 AM	NPS
12:00 PM		12:00 PM		12:00 PM		12:00 PM	Lifecycle Presentation
12:30 PM	Welcome Lunch	12:30 PM	Lunch with Manager	12:30 PM		12:30 PM	Lunch
1:00 PM		1:30 PM		1:00 PM		1:00 PM	Engineering
1:30 PM	Relias Overview	1:30 PM	Intro to	1:30 PM		1:30 PM	Partnerships
2:00 PM	RLMS Intro	2:00 PM		2:00 PM		2:00 PM	
2:30 PM	Relias Culture w/Jim T.	2:30 PM		2:30 PM		2:30 PM	Relias Connect
3:00 PM	Group Project Introduction/Site Visit	3:00 PM		3:00 PM	Offsite Activity- Low Ropes Course (Bond Park-Cary, NC)	3:00 PM	
3:30 PM	Review & Expectations	3:30 PM		3:30 PM		3:30 PM	
4:00 PM	Brainstorming	4:00 PM	Zoom Activity	4:00 PM		4:00 PM	Group Project
4:30 PM		4:30 PM		4:30 PM		4:30 PM	
5:00 PM		5:00 PM	Daily Wrap-up/Homework	5:00 PM	Daily Wrap-up/Homework	5:00 PM	Daily Wrap-up/Homework
5:30 PM		5:30 PM		5:30 PM		5:30 PM	
	RLMS, Information Security, Criticals Course	Home Work	Courses - HR Courses	Home Work	Courses - Customer Content	Home Work	Where would you send your loved one?
						Home Work	Site Visit Prep/Final Project Work/LMS Course

CORPORATE BOOTCAMP

Pre-Hire - Manager

- Send a Welcome Note
 - Include schedule and new hire paperwork
- Set-up workstation and systems access
- Notify current employees

The Relias Way



Onboarding: Part II

30-60-90 Day Plans

- Break into smaller chunks
- Instantly applicable
- Built in check-ins
- Manager accountability

“Research and conventional wisdom both suggest that employees get about 90 days to prove themselves in a new job. The faster new hires feel welcome and prepared for their jobs, the faster they will be able to successfully contribute to the firm’s mission.”

-SHRM

First 30 Days*

- Introduction to organization
- Connect with human and system resources
- Major responsibilities and expectations
- Corporate Onboarding Program
- Technology overview
- Review 30-60-90 Day Plan

Do not overwhelm them during this period. You want them to feel part of the team by the end of 30 days and have solid grasp on basic job functions.

*Frequent check-ins during this period are vital.

30 Day Check-in

- Review all 0-30 Day plan items and agree on completion
- Engage 1:1, should be a formal check-in.
 - Ask things like:
 - Where are you excelling?
 - Where do you need more training?
 - Do you have any complaints or concerns?
 - What questions do you have?

31-60 Days

- Master skills from 0-30 day
- Client knowledge
- Tier 2 job functions that build on 0-30 day items
- Integrate with resources outside of department
- Role Clarity

60 Day Check-In

- Review all 31-60 Day plan items and agree on completion
- Engage 1:1, should be a formal check-in.
 - Ask things like:
 - Where are you excelling?
 - What development and training do you want or need?
 - Have you identified a potential mentor?
 - Do you have any complaints or concerns?
 - What questions do you have?

61-90 Days

- Master 31-60 day skills
- Tier 3 responsibilities, building on 31-60 days skills
- Role Clarity
- Comfort in Organization
- Assess areas development

90 Day Check-In

- Review all 61-90 Day plan items and agree on completion
- Engage 1:1, should be a formal check-in.
 - Ask things like:
 - Where are you enjoying the most?
 - What development and training do you want or need?
 - Do you have any complaints or concerns?
 - What questions do you have?
- Schedule follow-up: Development Plan (next 2 weeks)

30-60-90 Day Template

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New Hire 30/60/90 Day Plan

Employee: _____ Start Date: _____
Position: _____ Manager: _____

First 30 Days				
Item	Start Date	End Date	Resources Needed	Required Result

30 Day Check-In

Employee Signature

Manager Signature

31 – 60 Days				
Item	Start Date	End Date	Resources Needed	Required Result

60 Day Check-In

Employee Signature

Manager Signature

61 – 90 Days				
Item	Start Date	End Date	Resources Needed	Required Result

90 Day Check-In

Employee Signature

Manager Signature

111 CORNING ROAD, SUITE 250, CARY, NORTH CAROLINA 27518

Post 90 Days

“Providing true **early career support** today stands as the single **most important** thing firms can do to **energize** new hires and gain their **long-term loyalty** and **enthusiasm**.”

~Mark A. Stein & Lillith Christiansen
Authors of Successful Onboarding

The Relias Way



Onboarding: Part III

Onboarding: Ongoing Through First Year

- Individual Development Plan (IDP)
- Feedback, guidance, and recognition
- Provide the right tools
- Are they included as part of the team
- Provide employees a purpose
- Check-in

“You get the employee engagement you deserve. If you don’t engage with them, they won’t engage with you... This is particularly true at important moments of truth starting with how you onboard them.”

-George Bradt, Forbes

Development Plan Template

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INDIVIDUAL DEVELOPMENT PLAN (IDP)

Individual development planning helps identify your current strengths and areas for improvement, enhance your job-related abilities, and focus your career direction. You and your manager will work together to complete a living, breathing development plan. Your manager's role in the process is to provide feedback, guidance, and support for your plan.

```

graph TD
    A[Set Goals] --> B[Coach]
    B --> C[Feedback]
    C --> D[Develop]
    D --> A
            
```

*Aspire to be...
Dare to achieve...
Reflect in earnest.*

Developmental Period: From: To:

Employee Information

Name: Manager:

Title: Department:

Current Position Development

Review the key knowledge, skills, abilities, and characteristics (KSACs) indicative of success in your current job, including any job-specific competencies, if applicable. From these KSACs and feedback from your manager during your initial IDP meeting, outline up to three strengths and development areas for your success in your current job.

Strengths What work methods and behaviors support achievement of key results in your current position?	1. <input type="text"/>
	2. <input type="text"/>
	3. <input type="text"/>
Developmental Areas What changes in work methods and/or behaviors are needed to support key results in your current position?	1. <input type="text"/>
	2. <input type="text"/>
	3. <input type="text"/>

Future Development

Areas of Interest What specific roles or areas beyond your current job are of interest to you (in order of interest)? These can take the form of additional responsibilities, other roles in the organization, and/or other developmental opportunities in and outside of work.	1. <input type="text"/>
	2. <input type="text"/>
	3. <input type="text"/>
Transferables What knowledge, skills, abilities, or characteristics (KSACs) do you possess that would help facilitate your transition into one or more of your areas of interest?	1. <input type="text"/>
	2. <input type="text"/>
	3. <input type="text"/>
	4. <input type="text"/>
	5. <input type="text"/>
	6. <input type="text"/>

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Your Plan

Developmental Areas
What skills would you need to refine, improve, or develop to be considered successful in an area of your interest?

1.

2.

3.

Create one to three Developmental Goals to improve specific KSACs for your current job and/or an area of interest that you identified above. Developmental Actions are concrete activities that will help you develop competence in your specified KSACs. Success Measures identify measurable objectives that signify your increased competence. Resources/Support indicate what is necessary for you to execute your development actions and activities.

Developmental Goal	Developmental Actions	Success Measures	Resources & Support Needed	Target Date
1. <input type="text"/>	1. <input type="text"/> 2. <input type="text"/> 3. <input type="text"/>	1. <input type="text"/> 2. <input type="text"/> 3. <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="checkbox"/> Complete?
2. <input type="text"/>	1. <input type="text"/> 2. <input type="text"/> 3. <input type="text"/>	1. <input type="text"/> 2. <input type="text"/> 3. <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="checkbox"/> Complete?
3. <input type="text"/>	1. <input type="text"/> 2. <input type="text"/> 3. <input type="text"/>	1. <input type="text"/> 2. <input type="text"/> 3. <input type="text"/>	<input type="text"/>	<input type="text"/> <input type="checkbox"/> Complete?

Comments

Your Comments <input type="text"/>	Manager Comments <input type="text"/>
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Signatures

Your Signature: <input type="text"/>	Manager Signature: <input type="text"/>
Date: <input type="text"/>	Date: <input type="text"/>

Four Promises You Should Make To Every New Hire Through Your Onboarding Practices

1. You will work to develop them as people in alignment with company goals.
2. You will give them the resources they need to do their job effectively.
3. You will provide them with transparent and frequent communication.
4. You will hold them accountable for clearly defined high performance standards.

Thank you.

