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WHITE PAPER

Refining Your Executive Onboarding Process

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> Refining Your Executive **Onboarding Process**

Years ago, on the day a new hire began work, it was customary to hand him a stack of HR forms, send him off to the standard orientation presentation and tour, and hope for the best. But today, in our fast-paced, customer-focused, and increasingly technical world, it takes much more to get a recently hired manager or executive up to speed and ready to “run with the big dogs” so to speak. As a matter of fact, you may as well drop the word “orientation” from your vocabulary and replace it with onboarding.

The concept of onboarding implies that you have a customized strategy in place for taking a new team member on board and showing them the ropes from all angles (e.g., exemplifying the answers to fundamental questions such as: What are the goals of this company, this department, this position? What is the role of each department and how do they work together? How do I and my responsibilities affect the department and the company?)

In his article, *Accelerating Onboarding*, Managing VP and Chief Learning Officer for Capital One, Ted Forbes, attests that the following four elements are “essential to the strategy of aligning new associates around the goals of the business:

- *Educating: Teaching the new associate about the company, its business goals and its expectations of the associate's contribution to the firm's success.*
- *Training: Providing the tools and information necessary for a proficient associate from the beginning.*
- *Acculturating: Immersing the associate in the company culture, its language and values.*
- *Assimilating: Creating a comfort zone, enabling the associate to perform appropriately in the company's workplace*

5 Best Practices for **Effective Onboarding**

Develop a Clear Game Plan for Each Hire

Imagine you're a newly hired Sales Manager at a cosmetics manufacturer. You arrive promptly on the first day only to find IT behind in getting your laptop set up, HR scrambling to gather paperwork, and management too busy to greet you and introduce you around. Doesn't exactly generate enthusiasm does it? Of course not, but this scenario commonly plays out in far too many businesses.

Failing to prepare not only wastes the time of your new hire, it also negatively impacts members of his or her team who are waiting for the new hire to get settled in and down to work. In the most extreme cases, a poorly managed onboarding process can cause a new hire to lose trust in the organization and lead to unanticipated turnover.

Before any newly appointed executive starts, take time to review the individual's duties and responsibilities. Determine what the person will need to know in terms of corporate goals, department objectives, policies and procedures, organizational norms, and team dynamics. And most importantly, make sure short and long-term responsibilities and expectations are clearly defined. (See Best Practice 3 for more on setting expectations).

Next, formulate a detailed orientation plan for each day of the employee's first week. This plan may include: time with executives who can clearly convey corporate priorities; introductory meetings with department heads, managers, customers, and vendors with whom your new hire will interact; initial interviews with subordinates to understand their roles and concerns; and attendance at appropriate meetings to get up to speed on current projects and issues.

Include All Relevant Departments

Typically, the HR department controls the onboarding process. But when it comes to the future success of your new hire, many other departments and people will play a more critical role. When planning your onboarding process,

be sure to consider engineering, IT, customer service, legal, R&D, marketing, sales, operations, and even administrative support in your meeting plans. Onboarding a new executive should be a joint effort to be shared with all departments.

As Ted Forbes asserts, “HR's control of onboarding frequently results from management's underestimating the importance of the process. It's just not viewed as a business lever, which is why onboarding might become little more than a checklist exercise to meet those basic HR requirements.” If approached from such a perspective, onboarding is going to be a missed opportunity for everyone involved. Expand the scope of onboarding and you'll expand the scope of success for that

Clarify Expectations from Day One

Vague goals produce vague results. If you are serious about driving performance, clear—and realistic—goals must set up front. Together discuss and document your performance expectations. Set specific objectives and development milestones for the first month, three months, six months, and year. Explain and demonstrate your performance evaluation process. Offer examples of the successes other executives in your organization have achieved...and perhaps how they were rewarded. If applicable, explain the potential for future promotion. By providing specific performance expectations and setting realistic goals, you dramatically reduce the changes for misunderstanding down the road.

Also, as tempting as it may seem, don't sugarcoat any of the problems your new hire will face. Be open and candid about the pressures associated with your company, your team, your customers, and your competition. Warn him or her of any roadblocks or challenges that may come his or her way. This will curtail the odds of a shell-shocked employee two weeks into the job.

Take Advantage of Technology and Networking

In the past, orientation was predominately about filling in forms and getting lectured on corporate policies. While this information must be shared, technology offers more efficient ways to convey the data. For example, in their “Jump Start” program, Capital One provides new hires with an online portal containing basic orientation information before they begin their job. According to Ted Forbes, “Capital One designed a series of e-learning modules that new hires can access on a website...this site provides information on culture, values and business lines, and it includes PDF versions of essential forms to download in advance of the onsite onboarding class.” Technology-aided preparation such as this allows for direct knowledge sharing between manager and candidate to happen as soon as the candidate arrives on the job. As an added bonus, the new hire feels much more prepared and familiar with the company’s policies on day one.

Another way to facilitate the onboarding process Shell invites new hires to an onboarding workshop six months into the job, bringing all the other new employees together from around the world. They discuss the goals, challenges, and expectations they’re facing. They are encouraged to share achievements and setbacks and help each other brainstorm solutions. As an added bonus, this early networking opens up communications and cooperation for future collaborations that might not have otherwise taken place.

Provide Early and Frequent Feedback

Many large companies such as Capital One and GE have a formal appraisal process in place to assess and evaluate new employees early on—as soon as three or six months on the job. This preliminary performance review provides a newly appointed manager or executive with both positive feedback and guidance as to where improvements can be made. By providing early and frequent feedback, you can ensure new hires stay focused on the right priorities and prevent bad habits from developing. Ideally, the new hire appraisal process should encourage two-way dialog, so your organization can take advantage of the new hire’s fresh perspectives and suggestions for improvement.

As I hope this article has illustrated, effective onboarding certainly requires more investment of time and resources than the typical orientation process of the past. But if you are looking to drive innovation and instill a commitment to excellence, your success starts day one. In the words of Capital One’s Ted Forbes, “When onboarding becomes a strategic process, it creates an atmosphere in which employees are engaged, productive, and excited about their jobs, brightening everyone’s prospects, especially the company’s.” Definitely a win-win



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