

# **Successful Onboarding:** *How to Get Your New Employees Started Off Right*

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## **Introduction**

The term “Onboarding” refers to the process of integrating new employees into the organization, of preparing them to succeed at their job, and to become fully engaged, productive members of the organization. It includes the initial orientation process and the ensuing 3-6 months (or however long it takes to get an employee “up to speed” in a particular company or discipline).

This white paper focuses on how to avoid the common mistakes and careless errors so many organizations make in the onboarding process and how to design an onboarding process that not only prepares employees well, but leaves them feeling inspired. We will provide guiding principles, practical strategies, a series of diagnostic questions, and best practices you can use to upgrade your onboarding process.

Regarding best practices... while it’s natural to look for the “right” or “best” way to do something, best practices are perhaps most useful as a stimulus for creating one’s own approach. Because each organization has a unique personality, culture, and constellation of operational needs and challenges; creating a customized approach to address the particularities of one’s organization will be more successful than adopting whole cloth someone else’s solution.

## **Why Bother Investing The Time and Resources When You’ve Got So Much Else to Do?**

An investment in effective Onboarding is an investment in employee retention, morale, and productivity. Research at Corning Glass Works revealed that employees who attended a structured orientation program were 69% more likely to remain with the company after three years than those who did not go through the same program. Another study conducted at Texas Instruments showed that employees

whose orientation process was carefully attended to reached “full productivity” two months earlier than those whose orientation process was not.<sup>1</sup>

More recently, Hunter Douglas found that by upgrading their onboarding process, they were able to reduce their turnover from a staggering 70% at six months, to 16%.<sup>2</sup> These changes also translated into improved attendance, increased productivity, and – not surprisingly – a reduction in their damaged-goods rate. At Designer Blinds, an Omaha based manufacturer of window blinds, upgrading the onboarding process played a central role in reducing turnover from 200% annually to under 8%! Because of the dramatic drop in turnover, they were able to reduce their recruiting budget from \$30,000 to \$2,000.

A 2003 study by Hewitt Associates demonstrating the connection between effective onboarding and engagement revealed that companies who invested the most time and resources in onboarding, enjoyed the highest levels of employee engagement.<sup>3</sup>

Both research and common sense tell us that it makes sense to invest time and effort into preparing employees to be successful at their jobs. If you want them to become productive as quickly as possible, why would anyone not do what it took to make that happen? If you’re going to spend all that money on acquiring them and paying them to come to work, why would you not prepare them to succeed?

Despite the obviousness of this, many organizations approach new hire orientation with a level of professionalism and quality they would never tolerate in their daily operations.

### **Orientation As Nightmare**

Rex Castle, Senior VP of Human Resources of State National Bank of Lubbock, Texas, captures the typical new hire orientation nightmare:

" You come in and sit down in monumentally uncomfortable chairs and are bombarded with papers, rules, policies... you know those ‘this is how you get fired’ sort of comments. If it’s a big employer and a big group of new hires, someone stands in front of a PowerPoint slide show and reads the slides to you.

Usually it's an HR underling who is totally uncomfortable in front of a group and rarely, if ever, smiles ... You sign and sign and sign more paper than if you were buying a house... and then you walk out thinking ‘man, I hope I don't get fired, but at least I know how to get fired’.... And those are the good ones.... The poor ones are done by a harried manager at a location and God only knows what it is the employee is receiving in terms of an understanding of policies and procedures."

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<sup>1</sup> Rebecca Ganzel, "Putting Out the Welcome Mat," Training Magazine, March 1998

<sup>2</sup> Keith Hammonds, "Why We Hate HR," Fast Company, August, 2005.

<sup>3</sup> Best Employer to Work for in Australia, Hewitt Associates, 2003

Most employees have had variations on this theme, including some of the classics:

- Being put to sleep by presenters who either needed a personality implant or a Toastmasters overhaul.
- Watching the HR rep scurry about trying to find the laptop and projector, or the correct copies of employee manuals, while everyone waits and fidgets.
- Discovering that their work station is “not quite ready.” While it is covered with outdated equipment waiting to be discarded and boxes of miscellaneous “stuff”, it doesn’t have a telephone or PC.
- Having a harried – or just plain disrespectful – boss show up an hour late to “welcome” them on their first day (This was not an uncommon occurrence at a company that, not surprisingly, had low morale and a 40% turnover rate.)
- Handing them off to the first available employee – including the most cynical, resentful, burnt out, disengaged employees – for “first day on the job coaching.”

Eric Wood, President of EnviroSense, Inc., a New Hampshire based environmental consulting firm, captures the “why bother do onboarding right”:

*With a thorough orientation and onboarding process, the probability of achieving the goals of the business and the employee are greatly increased; without it, the probabilities of disappointment, employee turnover, re-work, and dissatisfied clients all grow unnecessarily.”*

## **Are You Making These Common – and Costly – Mistakes?**

In this section, we will briefly describe some of the more common mistakes organizations make in the onboarding process.

### **Are you trying to cram 20 hours of information into 4 mind-numbing hours (or some equivalent ratio)?**

From a purely practical point of view, doing this wastes your time and you’re your hire’s. If it’s impossible for them to absorb the information; if it’s going in one ear and out the other, why spend precious time on this exercise in futility? Smart organizations break orientation into “bite sized chunks.” They also select the most effective medium for the particular type of information, offloading information that is best accessed on one’s own onto the corporate intranet.

Cramming too much information also sends an undesirable message to your new hires. Because it’s so blatantly ineffective and unpleasant, employees can interpret this as an indication that:

1. Their new employer is a second-rate outfit that doesn't do things right.
2. Their new employer doesn't care about how it affects its employees... i.e. they don't respect their employees.

### **Are You Running a Slipshod, "Fly By the Seat of Your Pants" Program, Believing That Doing So Has No Negative Impact?**

If you run a slipshod, disorganized, second-rate orientation program, you are sending the message that you're a slipshod, second rate company. Harsh as that may sound, that's the message such programs send.

While all operational decisions and practices can impact an employee's assessment of the overall intelligence, professionalism, and effectiveness of their employer, few moments of truth are as vulnerable to interpretation as the onboarding process. There are several psychological reasons for this vulnerability.

First, human beings are "meaning making creatures". One of the most fundamental human drives is the need to make sense out of our world. Few experiences create greater anxiety than not understanding what is going on or why something is happening. In the workplace, when something significant occurs – our boss scowls at us, we hear of an upcoming all-staff meeting about a "new development", or we're not asked for input on a change that directly affects our job – we try to make sense out of what just happened and why. In the absence of an explicit external explanation, we generate our own explanation.

This need to understand and explain to ourselves what is happening and why it's happening, is most powerful when we find ourselves in uncharted territory. In unfamiliar situations, especially those that are ambiguous – i.e. we're not sure what is going on and no one is guiding us – we feel vulnerable. When we feel vulnerable, we feel insecure. In this emotional state, we are especially sensitive to any clues – real or imagined – that will help us make sense of our situation. Hungry for clues, for information that we can use to make sense of this new environment, we are more likely to come to hasty conclusions, based on minimal information.

Cognitive psychologists call this making a "premature cognitive commitment." Premature cognitive commitments – coming to a conclusion without getting enough facts to make a truly accurate impression – also leads one to achieve a false sense of closure and certainty. Once a person makes a premature cognitive commitment – once they've arrived at their assessment about a person or situation – future data is unlikely to shake their "understanding." Thus, the truism "You never get a second chance to make a first impression".

Because new hires find themselves in uncharted territory, they are more prone to grasping for any possible clue to help them understand their new environment. Thus, they are more likely to "make meaning" out of anything and everything their new employer does... or doesn't do. Thus, the new hire will more likely place greater significance on any displays of slipshod, disorganized, or poorly thought out

onboarding. Because of their vulnerability to premature cognitive commitments, they are more likely to take these perceptions and as indicators of the company as a whole. Those first impressions can and will taint their future perspectives on the employer.

### **Are you making your new hire orientations as dull as watching paint dry?**

Despite all the information available on creative training techniques, interactive exercises, and games, many organizations still insist on putting new hires through coma-inducing data dumps and form-filling marathons. Orientation programs that have filling out forms, speakers droning on about various policies, and watching the obligatory sexual harassment video as their centerpiece, neglect one of the most important roles of new hire orientation: creating an inspiring experience that reassures new hires they made the right choice and lays the foundation for high employee engagement. Neglecting this can cost significantly both in terms of employees never becoming engaged – and therefore not working to anywhere near their potential – or just leaving. In fact, Betty Lou Smith, VP of corporate HR at Hunter Douglas discovered that the primary reason for their 70% turnover in the first 6 months was because new employees never felt a connection to their new company; they never felt engaged. Prior to their onboarding overhaul, Hunter Douglas production workers received a ten minute orientation before heading out to the shop floor.

### **Do you use the “sink or swim” approach to onboarding?**

Throwing a new employee into the fray without appropriate support and coaching is one of the most common, and damaging mistakes an organization can make. Not only does it dramatically increase the odds the employee will leave, it communicates to all employees two morale and pride damaging messages: “Management doesn’t care about their people” and “Management doesn’t have common sense.”

### **Do you use the “No news is good news” and “Out of sight, out of mind” approach to following up?**

Effective onboarding means keeping in touch with your new hires as they integrate into your organization. It means actively seeking them out to find out how they’re doing and – this point is critical – making it easy for them to tell HR and their boss what’s on their mind. Even assertive individuals can be reluctant to ask questions or say “the way you do this isn’t working...” Thus, the more safe and easy you make it for new employees to speak the truth, the more likely you are to prevent employees from waiting until their exit interview – 90 days into their job – to tell you what went wrong.

## The Cost of Such Mistakes

To summarize and expand upon previous points, these common onboarding mistakes cost an organization in a number of ways, some obvious, some not so obvious.

1. **Increased turnover.**
2. **Diminished productivity** - This is one of the biggest costs of unwanted turnover (i.e. quality employees leaving). New employees are not only less productive as they climb the learning curve, they're also more likely to make errors and deliver substandard service. The longer they spend in the "at risk of being substandard" stage, the less value they provide, and the more risk they create in terms of lost customers, accidents, and injuries.
3. **Reduced engagement** – The first few months of a worker's employment is in some ways like the phenomenon of imprinting seen in many species of animals. Classic experiments with ducklings demonstrated that they imprint and bond to their mother – or in the absence of the mother, the scientist studying them – only during a small window in the duckling's development. Employees are most likely to "imprint" on their employer during the early days of their employment. In this time period, they are most impressionable. If their initial experience is not one that leaves them feeling inspired, valued, and valuable... that impression will minimize their level of engagement, which, as anyone familiar with the research on engagement knows, has tremendous financial implications.
4. **Reduced respect for management and the company as a whole.** - This not only reduces an organization's ability to generate employee referrals, but also increases resistance to changes and new initiatives promoted by management. Employees are much more likely to doubt and resist management decisions if they don't trust management's intelligence and wisdom. Research by Watson Wyatt Worldwide reveals that organizations where employees trust management enjoy 300% greater profitability than those with employees who don't.<sup>4</sup>
5. **Reduced pride in the organization.** - This costs an employer in several ways. First, it minimizes employee referrals and positive PR. Proud employees want to tell people about how great their employer is, and they want to refer their friends and colleagues. As the word gets out that an organization is not an employer of choice, the talent pool they drink from becomes increasingly smaller. This problem is especially serious in industries where "the best of the best" are exponentially more valuable than "good" or "average" performers. The best, most talented employees – those who take the most pride in their work and are superstars at what they do – demand excellence not just of themselves, but of others. If they don't feel proud of

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<sup>4</sup> Workforce USA 2003, Watson Wyatt Worldwide

where they work, they'll find an employer they can be proud of.

## Getting Onboarding Right

### Mantras For Onboarding Success

#### **“Everything Matters”**

Everybody involved in the onboarding process would be wise to keep in mind what Scott Bedbury learned while working for one of the most powerful brands in the world. While on a coffee hunting expedition with Dave Olsen, Starbucks's chief coffee buyer, Bedbury, author of *A New Brand World: Eight Principles for Achieving Brand Leadership in the 21st Century*, inquired about the secret to Starbucks's branding success. What was – to use anthropologist and philosopher Gregory Bateson's famous term – the critical “difference that makes a difference?” What mattered the most? Was it all about the coffee beans? Was it the ambience they so assiduously create? Was it the employees they hire? What particular part of their winning combination mattered most? After pondering Bedbury's question and weighing the variables, Mr. Olsen responded: “EVERYTHING matters.”

When it comes to onboarding, Everything Matters. Every choice, every action, every communication has potential consequences. Not only does every choice have a consequence in terms of how quickly an employee gets up to speed, every choice communicates to the employee something about your organization. Poorly organized, “fly by the seat of your pants” orientations communicate something very different about an organization than does a well organized, professionally delivered program.

Recognizing the importance of having new hire orientation reflect and support the company's culture of excellence, Eric Wood, President of EnviroSense, Inc., requested that his HR team conduct an “orientation makeover.” Because every action carries an implicit message, their new orientation program communicates to employees a message consistent with the company's culture, mission, and values. Notes Eric Wood, President of EnviroSense:

*In our business, high levels of performance and attention to detail are critical and expected of every employee. In order to ask for this level of performance, we want to make sure we show our employees the same commitment.*

The level of support provided to employees after leaving orientation also communicates an important message. Using a “sink or swim” approach to onboarding communicates a loud “We don't care about or value you” message, while an onboarding process that provides new hires with a mentor and periodic check-ins sends employees the kind of message that leads to engagement and loyalty.

At Community Living Association, a non-profit organization that provides services to individuals with developmental disabilities, employees frequently complained about how awkward it was going into a new home when they were both new to the job and a stranger to their future client. To remedy this, new CLA employees no longer have to “cold call” their new client. Instead, a staff member who already knows the clients makes the introduction. By demonstrating their concern for their new employees’ comfort CLA’s management obviously communicates a far different message than if they had adopted a “That’s just how it is... deal with it” stance.

Another significant Moment of Truth that matters greatly is whether your orientation focuses on rules and regulation and neglects the inspirational component of being a new employee. Making orientation primarily about rules and regulations communicates something very different about an organization than an orientation with strong “We’re happy you’re here”, “You’re part of a great organization,” and “This is why your job is so important” messages. One says “This is just another job” the other “You’re part of something great... and you matter.”

A corollary of the “Everything Matters” principle is “Little things can make a big difference.” For instance, at Northeast Delta Dental, recognized as the Fourth Best Small Company to Work for In America by the Great Places To Work Institute, senior level managers come to orientation to talk with new hires about what their specific department does – helping them understand the big picture -- and the important role the new hires will play in contributing to the company’s goals – thus, linking their individual “little pictures” with the big picture. Doing this matters. It taps into two of the most important human needs, the need for meaning and purpose – to do something worthy with one’s life – and the need to matter, to know that one makes a difference.

The HR department at NEDD doesn’t stop there, though. To make sure each speaker’s presentation is as relevant as possible, executives are briefed ahead of time about who will be attending and what department they will be joining. This allows them to tailor their remarks to make them most relevant to this particular audience. Such attention to detail and professionalism matters. It tells new employees: “You’ve just joined a company that does things right... You’ve joined a world class outfit.”

In summary, “Everything Matters” will be one of the most useful guiding principles to use when making strategic and operational decisions related to onboarding. Applying this principle means bringing greater attention and mindfulness to each and every facet of the onboarding process. Because of its broad applicability and importance, the principle of “Everything Matters” will be a reoccurring theme throughout this white paper.

### **Think “Experience”**

Those involved in the onboarding process could benefit from the concept that has captivated the customer service field: “It’s About The Experience”. Smart

companies today recognize that if they are going to differentiate themselves, they need to continually analyze and improve upon the customer service experience they deliver. It isn't enough to make a transaction efficient or give the customer what they want. To stand out requires creating experiences that leave customers saying "Wow, I wish every business was like this."

When creating or revamping an onboarding process, think "Experience." When making decisions about how to structure the orientation process, how to welcome your new hires, how to introduce them to their team members and the company as a whole, consider each choice through the lens of "What kind of experience does this choice create?" So for instance, overloading new hires with technical information on the first day, especially information such as benefits options which they won't need to act on immediately, creates an experience of overwhelm and frustration. Conversely, providing measured doses of only the most essential information in digestible chunks creates a very different experience. It leaves the employee with a very different feeling and a very different perception of their employer.

When "thinking experience", ask two questions:

1. "What Emotional Take-Away do I want to create?"
2. "What Perceptual Take-Away do I want to create?"

### **What Is the "Emotional Take-Away"?**

To apply the "Think Experience" principle with precision, examine each Moment of Truth through the lens of its "Emotional Take-Away." The Emotional Take-Away refers to the feeling that a person takes away from their customer experience. World class brand managers recognize that knowing what emotions you want to evoke in customers, and then knowing how to evoke them, is one of the keys to providing brand-building customer service.

Applying this principle to onboarding means examining each step of the onboarding process and asking:

1. "What emotions is this Moment of Truth likely to evoke?"
2. "The way we handle this...what feeling or feelings is it likely to leave our new hire with?"

Unfortunately, at most organizations onboarding decisions are not made with such discernment. Because of carelessness, many new hire experiences evoke the following emotions:

- Confusion
- Frustration

- Overwhelm
- Boredom
- Annoyance
- Anxiety
- Insecurity
- Disappointment
- Regret

Examine your various processes and decisions to see if these are the natural Emotional Take-Aways of the different Moments of Truth, and the total new hire experience. You'll obviously want to rework any Moments of Truth that generate these Emotional Take-Aways.

You then want to examine your onboarding process and design the new hire experience so that new employees feel:

- Welcome
- Comfortable
- Secure (as in "I know if I have a question, I know where to get the answer," and "I know enough to not feel in the dark.")
- Valued
- Important
- Proud
- Excited
- Confident

For example, if an orientation process requires new employees to sit through coma-inducing lectures on material they could easily and more efficiently read on the company's intranet, such an experience would naturally evoke frustration, boredom, annoyance, and doubt – doubt about whether their new employer is a top notch outfit.

Conversely, when employees experience an intelligently designed orientation program where information is imparted in the most efficient and engaging way possible, they're left feeling energized, inspired, and proud of their new employer.

In summary, analyze each step of your onboarding process in terms of the emotions it creates, and design into your onboarding experience the Emotional Take-Aways you would like to create.

### **What Is the Perceptual Take-Away?**

When evaluating the onboarding experience you're creating for new hires, you'll also want to examine the "Perceptual Take-Away" your experience creates. When making decisions about design, content, and resource investments, ask: "If we chose this option, what perception will it likely create... and is it the perception we want?" Many organizations approach new hire orientation in a "penny wise, dollar

foolish" manner: They scrimp on materials, location, lunch, etc. By doing so, they create a very different perception than companies who consciously create a classy, professional experience.

Rex Castle of State National Bank in Lubbock, Texas cites this intense focus on the Perceptual Take-Away as one of the reasons why he has been able to create two highly successful onboarding programs in two very different industries:

*"It's looking at every little thing and every big thing that we put together and saying "How will this be perceived?" "Is there a better way of doing this?" "How can we get these folks engaged in this process?"... We're telling them we're quality, we believe in customer service, and that we hold them as our most valuable asset... but are we showing them that?"*

Castle goes on to describe the thought that went into upgrading the new hire orientation of a beverage bottling plant he worked for – part of an improved onboarding process that reduced turnover from 45% to less than 5%:

*"... and we didn't put them up a cheap hotel, but (keeping) within budget... we put them at a Holiday Inn, or a Hilton, or a Radisson. And for lunch we didn't serve them cold sandwiches and/or soggy pizza. We catered barbecue, steak and/or chicken with china and real silverware. And we didn't keep them until the wee hours of the night and then ask them to drive home and work the next day. We let them go at 2 p.m. or 3 p.m. Instead of just saying 'we want you to respect each other', we demonstrated that by respecting them."*

Because Everything Matters and every action sends a message – and therefore creates a perception – think of each step of the process as an opportunity to send a desirable message. At Laconia Savings Bank, even before the onboarding process begins, the HR team sends future new hires the message that this employer is different.

"We hear 'this is a place that does things right' all the time," says Gayle Price, an Assistant VP at Laconia Savings Bank. "It begins with our application packet. When they apply, they get a 3-page summary of the bank's history, our philosophy, and expectations. It's truly a packet... not just an application form... When they apply, I think they know that with us, it's not just a job... It shows we've taken the time to think about who we are."

Does paying such attention to the little things make an impression? Commenting on the impact of receiving a similarly thorough and welcoming packet two years ago from her employer Northeast Delta Dental, recipient of the Fourth Best Small Company to Work for In America Award, HR Specialist Claire Gruenfelder remembers her response:

*When I went to the post office to pick up my offer letter, I was surprised to find out I had to go to the window to pick it up. It wouldn't fit in my post office box, because it wasn't just an offer letter, it was a packet! One of the pieces in the welcome packet was their application for the Granite State Quality Achievement Award (which the company received in 2000). It impressed me that they wanted to share that... It told me that they cared*

*that I knew about the company before I even started... I instantly felt "wow... they want me to be part of the company'..."*

At Laconia Savings Bank, within the first 30 days of the onboarding process, new hires sign a commitment to quality service – underscoring their role in making possible the bank’s brand promise. As part of the bank’s bonus program, new employees also set 3 job goals that are linked to the bank’s corporate goals. Reports Assistant VP Gayle Price: “It helps them see how what they do, helps the bank. They see that they have a daily impact.”

These pre-hire and onboarding Moments of Truth are likely to leave new employees with the following Perceptual Take-Aways: “This is a company I can be proud of” and “The work I will be doing here matters... I’ll have the chance to make a difference” – two of the most important perceptions an employer can create, and two of the biggest drivers of employee engagement.

The attention both Laconia Savings Bank and Northeast Delta Dental place on the “Getting the Application Experience” and the “Receiving the Offer Letter Experience” demonstrates the positive impact of bringing greater mindfulness to the whole process of recruiting and hiring, and not restricting the application of these principles to the onboarding process.

Although it takes more time and effort, addressing the larger context of which onboarding is a part allows you to create a more consistently positive employee experience. Addressing the larger context also enables you to more effectively develop Employer of Choice status, because you upgrade the many Moments of Truth that might not technically be seen as part of the onboarding process, but which still affect it.

For instance, while having a formal mentoring process and easy access to information is an integral part of effective onboarding, to be most effective, such processes are most effective when part of a culture characterized by goodwill and teamwork. An example of the benefits of creating such a culture were articulated by Suzanne Bagg, a new hire from The NHHEAF Network Organizations, an organization that provides financial aid services to college students. When asked what made the biggest difference in terms of getting up to speed on the job and feeling integrated into the company, Ms. Bagg shared the following:

*One of the things I appreciate most about the department in which I work is that the Senior Reps not only offered their assistance, but I feel like they genuinely want me to succeed...I can go to any of them with a question, at anytime. In addition, if I haven’t called/contacted them with a question in a while, they actually come by my desk, just to check on me, and see how I’m doing, if there’s anything they can help me with, etc. It’s a very supportive environment.*

Addressing the larger context means not viewing onboarding simply as a programming issue requiring an upgrade of the orientation program or throwing together a mentoring program. It means examining the different aspects of the job experience, the corporate culture, and managerial practices to see if they contribute to new employees having a “This is a great place to work!” experience.

"It requires a different level of thinking," emphasizes Deb Franklin, HR Manager of Omaha- based Designer Blinds, when describing the critical "difference that makes a difference" in their overhauling their onboarding process and reducing turnover by 96%. "You need to think in terms of the employee's everyday work world, not just what program you're going to develop...for instance, it's important for managers to keep in mind that their everyday actions are studied by their direct reports..."

Thus, applying the questions: "What is the Perceptual Take-Away?" and "What is the Emotional Take-Away?" to managerial behaviors, corporate policies, and cultural norms that impact the new hire experience will make possible an onboarding experience that creates the kind of emotions and perceptions that lead to an inspired, engaged, committed workforce.

## **Differences That Make a Difference**

In this section, we will explore some of the key components and characteristics of an effective onboarding process, including best practice examples.

### ***Do You Make Your New Hires Feel Welcome?***

This is such a critical moment of truth. If new hires get the feeling they are just a number, they will act that way. Conversely, if new hires feel welcomed and valued from the outset, they are more likely to act in ways that provide value. Because it's easier connecting with people who welcome you, they will also more quickly and easily become integrated into their team and the company.

Besides the obvious practice of having a "Welcome to our new employees: \_\_\_\_\_" sign in the lobby and perhaps the cafeteria, other ways of welcoming new hires include creating a poster with welcoming messages from supervisors in the department and team members, and having a welcoming "goodie bag" and plant, as they do at Northeast Delta Dental.

At The NHHEAF Network Organizations, when new hires enter the orientation class room, they're greeted by a cheerful PowerPoint slide saying "We're Glad You're Here!" and a generous, continental breakfast style spread. They also receive a welcome message from their president and CEO, Rene Drouin, or another senior level executive if he is out of town.

### ***Do You Inspire Pride?***

One of the most important roles of the onboarding process, especially new hire orientation, is communicating to new employees:

1. You made the right decision.
2. You're lucky to be part of this organization.
3. This is what makes us great; what makes us worthy of pride.

As discussed in previous sections, conducting an effective orientation program and consciously paying attention to the emotional and Perceptual Take-Aways of each Moment of Truth will contribute to new hires feeling proud of their employer. Outside of this, you directly address the need to feel proud of one's employer by talking about your organization's mission and what that means in everyday work life. You inspire pride by sharing stories that capture the magic, that illustrate what makes your organization special and worthy of pride.

### ***Do You Help New Hires See the Big Picture?***

Understanding the big picture plays a major role in whether employees become engaged. They're unlikely to feel connected to the big picture, if they don't know what it is and how it works. Talking about the company's mission and what makes it great is one component of bringing the big picture into view. Explaining how the organization works and how the various parts work together to make the organization function well is another critical part of this process.

At Northeast Delta Dental, not only do new employees learn how the various pieces of the organizational puzzle fit together through presentations by senior managers from the different departments, they also learn how the business works. Director of Finance, Frank Boucher explains how money comes into the company and how it leaves. Using NEDD's "Money Map," new hires become familiar with the financial workings and realities of their employer. This not only helps them understand how the big picture works, it also – as anyone familiar with Open Book Management knows – increases the chances that they will think and act like business owners throughout their employment at NEDD.

### ***Do You Show How Employees Matter?***

It's not enough to show new employees that they're part of something great. They also need to know that they help make that greatness happen. Tapping into the human drive to matter is one of the most powerful ways to engage employees. Most people want their lives to matter; they want to make a difference. Explain from the outset the importance of their contribution. Give examples of how employees made valuable contributions, how they came up with ideas for product and process improvements, and how management values and uses their input.

In overhauling the orientation program for a customer care call center, one of the major thematic changes the author made was emphasizing "You matter" from the outset. Rather than beginning the orientation process by lecturing to new hires about company rules, policies, and various technical aspects of the job, the revised orientation program started off communicating: "What you will be doing here matters tremendously." Through a combination of exercises demonstrating the impact they will have, and presentations by management about the vital role they

play, new hires got the message from the very beginning: "To our customers, you ARE the company... what you do matters... a lot."

At Northeast Delta Dental, one of the ways the company communicates to new employees that they are important and their contribution valued is by introducing them to the employee "ME File." Among the list of items employees are encouraged to fill their ME File with are: thank you notes from customers, TEAM Grams received from co-workers, appreciation notes from managers, and learning experiences they've had. At orientation, a couple of veteran employees bring their "Me Files" and read some of the letters and emails they've received. This not only communicates: "You matter" and "You are the voice of the company" to new hires, it also communicates: "We notice and celebrate excellence."

People want to know that they matter not just in terms of helping contribute to the big picture and to the company's goals, but also that they matter as a person. They want to know that their humanity and individuality are recognized and respected. At Designer Blinds, when new hires go on their tour of the plant, they pass by the company's Pride Board, where employees put baby pictures, their child's report card, pictures from the company's participation in The Relay for Life Walk, and other graphic displays that communicate: "Here, you will not be just a number. Here you will be seen and treated as a unique individual who has a life and an identity that extends beyond work."

### ***Do You Collect and Share Stories?***

Few forms of communication can match story-telling for the capacity to captivate, teach, and inspire. Stories make abstract concepts come alive and they make teaching points memorable. A well-told story is almost like being there. Because engaging stories create a strong visceral, vicarious experience, they can create powerful Emotional and Perceptual Take-Aways that last a lifetime.

Thus, orientation programs should include inspiring stories that illustrate the key values of your organization, your unique culture, how much employees are valued and respected – and anything that lets new hires know what is good and what is special about your organization.

At Healthwise, considered an employer of choice in Boise, Idaho, management helps new employees understand the company's unique culture through employer brand-defining stories such as the epiphany founder Don Kemper had in 1969 at the age of 24 that led to the creation of Healthwise, which provides health information products designed to empower consumers to make informed healthcare choices. The company also has their "They just can't stay away" stories. "Unlike the movie *The Firm*, where the senior partner ominously tells the young lawyer 'No one ever leaves the firm', here, we say people just can't stay away," laughs Don Kemper. One of Healthwise's most notable examples of people who left – twice in fact – for positions that offered new opportunities, and then came back is President and COO, Gene Drabinski. The company's "People just can't stay away" stories let's new hires know that there's something special about this company.

To incorporate stories into your orientation program with greater intention and specificity, think about what key points and ideas you want new hires to remember. Think about your company's culture, values, mission, and vision. Think about the key attributes of your Employer Brand. Then, collect stories that capture these. Collect stories from your employees. Ask them to tell you about experiences they've had that capture what it's like working in your organization.<sup>5</sup>

### ***Do You Make Your Orientation Program Interesting and Interactive?***

As discussed in a previous section, for most organizations the answer would be "No." Making your orientation process interesting and interactive not only will dramatically increase the effectiveness of your program in terms of learning and information retention, it starts new employees off on a high note. In commenting on the reaction his highly interactive orientation programs get from new hires, Rex Castle of State National Bank reports:

*I'll have anywhere from 3 to 5 out of a class of 15-20 come up to me afterward and say "Rex, I've been through a lot of these and this was the most outstanding one I've ever been involved in" or, "Rex, when I heard 'orientation' I cringed because I've been to so many of these things and they are just boring, but I'm really glad I came to day. It was just outstanding."...Our goal for orientation should be WOW!!! If that's not the result we're achieving, we're doing something very wrong.*

Making orientation more interactive not only makes learning more enjoyable, it is also more effective because it mirrors the natural ways humans learn. Infants and toddlers don't go to seminars to learn how to walk, talk, or tie their shoes. They learn through exploration, through doing, through "figuring things out." The more learning is designed in ways that are consistent with human nature, the more effective it will be. Making orientation as interactive as possible is also a great team-building and new hire integration activity. Here are a few examples of interactive approaches to imparting important information:

1. At The NHHEAF Network Organizations, corporate trainer Joan Goeckel has new hires go on a "Scavenger Hunt & Tour" on their first day of orientation. With a list of items and people to locate and a map, new hires search the building for said items and individuals. Besides the fact that this is far more fun than hearing a lecture, it's more effective. Embedding learning in a real world context makes it both more understandable and accessible later.
2. In Hamilton County, Ohio, new government employees used to learn about the many government agencies and services by enduring a PowerPoint presentation that was, in the words of HRD Specialist Laura Maus: "incredibly boring." Ms. Maus and her colleagues turned this stupor-inducing

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<sup>5</sup> For more information on collecting stories, see "[How to Create a Magnetic Employer Brand](#)" by David Lee at [www.HumanNatureAtWork.com](http://www.HumanNatureAtWork.com)

presentation into a fun, interactive team-building contest. Teams of new employees receive information about the various county organizations and are then quizzed by a facilitator/game show host. The first team to “buzz in” and answer correctly receives points; the team with the most points wins.

3. At the South Carolina Department of Revenue, Jeanette Hornsby, Director of Taxpayer & Employee Education revamped their orientation program using Accelerated Learning principles and techniques, so that new employees no longer have to just sit and listen. In the words of Ms. Hornsby “They are sent out into the company to create knowledge on their own.” New hires interview team leaders to gather information about challenges they’ve faced and what they’ve learned. Rather than pore through 3-ring binders of information while someone reads to them, new employees get into hunter gatherer mode on the department’s intranet, searching for information such as career development plans, the training calendar, and important numbers. In another creative, and entertaining approach to understanding how the big picture works, participants “become” a tax return and travel from the mail room through each step of the tax return processing journey. The only downside to the new program, reports Ms. Hornsby, is that employees who were oriented “the old way” are “somewhat jealous” leading the team to consider a “re-orientation” class.

### ***Are You Designing It From the New Employee’s Perspective?***

Companies known for their great customer service design their service experiences from the perspective of the customer. By doing this, they’re able to discover and eliminate the “little” things they do that annoy customers. As many in the service field have noted, many companies design processes with themselves in mind – how to make their lives easier – rather than with their customers in mind (think of “store credit only” return policies, offshore call centers, and the old practice of “bankers hours”).

Many onboarding programs have a similar provider-centric design, rather than being user-centric. Effective onboarding programs are designed from the point of view of the new hire. Many aspects of being a new employee are forgotten by people who have been in an organization for several years. What would seem a “little thing” to a seasoned employee is yet another experience of feeling uncertain and vulnerable. Thus, viewing the new hire experience from the new hire’s perspective helps you include details you might not think are important.

When she revamped her company’s orientation program, Sheila Albere, HR Manager of Bensonwood Homes, a New Hampshire company that designs and constructs timber framed homes began the process by putting herself in a wide-eyed new hire’s shoes:

*I began by brainstorming about everything a new employee would need to know - or would want to know - everything from "where do I get a pencil?" to "how does a 401k program work?" I included many "cultural" things as well - for example "jargon" particular to our company.*

Just as listening to the voice of the customer plays a central role in designing brand-building customer service experiences, soliciting input from employees should play a central role in upgrading the onboarding process. Interview employees who have been with your organization from a month to a year and ask them for feedback and suggestions for improvement. Ask them about what information they would have appreciated getting, but didn't. Find out what information is easy to access and what is not. Asking for feedback and using this to upgrade your program will be one of the most important steps in improving your onboarding process.

### ***Are You Holding Your Orientation Program When It's Most Understandable and Beneficial?***

Correct timing was a common theme among Human Resource professionals who had put a great deal of thought and energy into creating their formal orientation program. While from the outset, individual new hires received a systematic orientation related to their jobs and the basics of being an employee at their new employer, holding group orientation programs every two to three months was seen by these HR professionals as ideal.

Attending the formal group orientation program too early leaves new hires' heads spinning. Waiting too long renders it irrelevant, according to Gayle Price, an Assistant Vice President with Laconia Savings Bank.

At Laconia Savings Bank, formal orientation programs are held every quarter. "We don't want anyone going more than three months without attending the full-day orientation," says Gayle Price. "If people were to go through it in the first couple of weeks, it would be way too overwhelming. After 6-12 weeks of employment, they've learned their job, they no longer feel like they don't know anything, so they've relaxed some, and they've gotten to see the company culture in action."

Having time to learn one's job and have some real life experience in the company provides the new hire with some context, so that when they hear representatives from other parts of the company describe their own "piece of the puzzle", it will make more sense.

Commenting on how THE NHHEAF Network Organization's orientation program compared to previous employers', Suzanne Bagg, a new hire in the organization notes: "I have worked in places that only do orientations twice a year, so it's possible that someone has been with the company for over 5 months before they go to an orientation. I think that's ridiculous!"

### ***Have You Broken Your Orientation Program Down Into Digestible, Bite Sized Chunks?***

As mentioned in an earlier section, overwhelming new hires with far more information than they can digest is one of the most common new hire orientation mistakes. By breaking down your orientation into more “bite-sized” chunks, they will be able to internalize more of the material. At Northeast Delta Dental, their single day orientation program went through several iterations prior to its current version. “We tried doing orientation in one day and people were overwhelmed. So we lengthened it to two days... but people said that was too long. We received a suggestion from a new employee to break it up into four half-days, which we tried, and now that’s what we are doing these days,” reports Bonnie St. Lawrence, Payroll and Benefits Coordinator for the company.

Just as Northeast Delta Dental did, get feedback from your new hires about how to break your program down into chunks that they can digest.

### ***Are You Offloading As Much Information As Possible To Your Intranet?***

One of the rules of effective learning is “just in time information delivery”. Rather than overload people with information they won’t remember the next day – let alone weeks or months later when they need it; instead teach them how to access the information when they need it.

Offloading as much information as possible onto your intranet will reduce time waste and increase efficiency. By offloading material to your corporate intranet that is better suited for just in time learning; you will free up more time in your orientation program for information and activities that will help your new hires hit the ground running. Providing employees with a user-friendly, easy access medium for finding the information they need also helps reduce their anxiety about not knowing everything and signals “this is a company that cares about its people and does things right.”

According to the IT research firm Gartner Research, electronic onboarding tools will play an increasingly more important role in successful onboarding, and therefore successful employee retention strategies. Such tools enable the organization to keep their employee manual online, avoiding the common out-of-date-as-soon-as-its-printed employee manual problem. Examples of onboarding information you can post on your intranet include:

- Welcome Messages from the CEO, Supervisor, Team Members, etc.
- Information on the mentoring program
- Benefits Enrollment
- Legal and Compliance Checklists
- Facilities Alerts
- Parking Instructions
- Storm Closing Policies
- Self-Paced Learning Modules with Reports for Supervisors
- Performance Review Follow-ups

## ***Do You Have a Mentoring Program?***

Just as a corporate intranet with easily accessible information helps quell a new hire's concerns about all the things they don't know yet, so does having a mentor. When we know it will be easy to find answers, we're not as concerned about what we don't know. Also, for the new hire, fears of looking dumb, or appearing to be a "high maintenance employee" by one's overworked boss are eliminated by providing alternative modes of getting answers. Many of the most anxiety creating issues for a new hire are issues related to "learning the ropes" about company politics, unwritten rules, who are the "go to" people, and informal channels for getting things done. Because it's not always comfortable asking one's boss about such sensitive, potentially politically incorrect issues, rather than ask, new hires often stumble about in the dark, learning by trial and error – and sometimes painful consequence.

By having easy avenues for getting information that is important for their sense of security, new hires can focus their attention on learning their jobs and becoming productive, rather than spending time trying to figure out how to negotiate this unfamiliar terrain.

Creating a mentoring program provides value to the organization in ways other than improving the onboarding process. It provides a useful vehicle to recognize employees who demonstrate leadership skills and job excellence. Being a Mentor should be seen as a reward. Providing employees with mentoring opportunities also gives the organization another avenue to provide professional development opportunities. Given that today's employee places great emphasis on building their skill portfolio, mentoring experience provides value to employees wanting to demonstrate skills that will help prepare them to be a supervisor.

As in all aspects of employee performance, make sure you prepare your mentors to succeed, rather than set them up to fail. Thus, to make being a mentor a positive experience, make sure your mentors have the training, guidance, and time allocation required to do this important job well. If they see it as a burden or a source of aggravation, they will telegraph that message to your new hires. To help mentors cover all bases, Bensonwood Homes' HR Manager Sheila Albere has created a Mentor Checklist that maps out specific tasks for the mentor at key intervals: prior to the new hire's arrival, the first day, the first week, and then tasks for months one through three.<sup>6</sup>

## ***Are You Making It Easy For New Employees to Tell You How They're Doing?***

Most new employees are reluctant to complain. Often, they wait until the exit interview to talk about why things didn't work out. "Rather than wait for the exit interview to find out what's wrong, we decided to conduct 'Entrance Interviews',"

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<sup>6</sup> Ms. Albere has graciously offered to let readers use Bensonwood's Mentor checklist as a template. To download it, go to: [www.HumanNatureAtWork.com/onboarding-resources.htm](http://www.HumanNatureAtWork.com/onboarding-resources.htm).

reports Deb Franklin of Designer Blinds. After analyzing turnover data, Ms. Franklin found that the most vulnerable time frame for new hires was between the second and sixth month. While their onboarding process seemed to be doing things right for the first month, it was this next time frame that needed serious attention.

Hence, The Entrance Interview was born. As New Hires enter this next phase, they meet with HR to discuss how they're doing and identify any trouble spots. Ms. Franklin reports their Entrance Interview has played a major role in reducing their turnover by 96%.

At Northeast Delta Dental, at the 90-day mark, new employees participate in what has now become a company tradition: "20 Questions With Connie."<sup>7</sup> Connie Roy-Czyzowski, VP of Human Resources sits down with each new asks them questions such as:

1. *How is your job?*
2. *Is it what you expected when hired?*
3. *Any surprises? If yes, what...*
4. *Do you have all the work tools you need?*
5. *How is your relationship with your manager?*
6. *Was New Employee Orientation helpful?*
7. *What would you do differently?*
8. *Do you visit NEDDWEB? (Ed. Note - the company's corporate intranet)*
9. *Was it easy to find?*
10. *Anything you need that you don't have access to?*

This structured interview at 90 days helps NEDD address issues that are affecting the new employee's morale and performance, and provides the company with valuable information on how to continually improve their onboarding process.

### ***Do You Help Your Supervisors and Managers Do their Part Well?***

As Gallup's ground-breaking research revealed: "It's all about the supervisor." More precisely, their research showed that an employee's supervisor plays *the* most significant role in that employee's performance, engagement, and morale. Thus, make sure you provide your supervisors and managers with sufficient training, guidance, and logistical support for their part in the onboarding process.

The supervisor and manager's role in onboarding is an area where it's especially critical to view the onboarding process within a larger context. If your supervisors and managers haven't received the proper training to bring out the best in their people and are not held accountable for doing so, they will become your "weakest link" in the onboarding process. Analyzing the "differences that made the

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<sup>7</sup> Connie Roy-Czyzowski has generously offered to let readers use Northeast Delta Dental's "20 Questions With Connie" as template for their own new hire check-in. To download it, go to: [www.HumanNatureAtWork.com/onboarding-resources.htm](http://www.HumanNatureAtWork.com/onboarding-resources.htm).

difference" in Designer Blinds' turnover turnaround, Deb Franklin cites investing in management development as *the* critical factor.

Thus, on a macro level, you want to honestly examine whether your organization has invested in the development of your supervisors and managers, and that they possess the skills to create a productive, empowering work environment.<sup>8</sup> If they don't, they can quickly and easily cancel out everything else you have done to help your new hires succeed.

On a micro level, you can help your supervisors and managers execute their onboarding duties successfully by conducting training specifically related to the onboarding process and their role in making it a success. You can also provide them with a straightforward "Onboarding To Do" list they can follow.<sup>9</sup> This not only makes sure busy supervisors and managers remember to address all the key components of their part of the onboarding process, it also makes their job easier. Rather than trying to recall "Now am I covering everything?", they have a Standard Operating Procedure to follow. Since Everything Matters, doing this communicates to your supervisors and managers that you care about helping them do their jobs well, and you care about them onboarding their people well.

## Summary

In this white paper, we identified some of the most common – and costly – onboarding mistakes:

- 1. Trying To Cram 20 Hours Of Information Into 4 Mind-Numbing Hours**
- 2. Running A Slipshod, "Fly By The Seat Of Your Pants" Program, And Believing That Doing So Has No Negative Impact**
- 3. Making Your New Hire Orientations As Dull As Watching Paint Dry**
- 4. Using The "Sink Or Swim" Approach To Onboarding**
- 5. Using The "No News Is Good News" And "Out Of Sight, Out Of Mind" Approach To Following Up**

We identified Four "Mantras for Onboarding Success" – Important principles to guide your onboarding strategy and design:

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<sup>8</sup> For recommendations on how managers can create an empowering work environment that maximizes employee morale, productivity, and engagement, see ["8 Ways Managers Can Improve Morale"](#) by David Lee at [www.HumanNatureAtWork.com](http://www.HumanNatureAtWork.com)

<sup>9</sup> Connie Roy-Czyzowski has generously offered to let readers use Northeast Delta Dental's "Manager's Guide-New Employee's First Week" checklist. To download it, go to: [www.HumanNatureAtWork.com/onboarding-resources.htm](http://www.HumanNatureAtWork.com/onboarding-resources.htm).

1. **“Everything Matters”**
2. **“Think Experience”**
3. **“What Is the “Emotional Take-Away?”**
4. **“What Is the Perceptual Take-Away?”**

Finally, we explored thirteen “differences that make a difference” in whether your onboarding program will prepare your new hires to succeed at their jobs and become engaged, committed, highly productive employees:

1. **Do You Make Your New Hires Feel Welcome?**
2. **Do You Inspire Pride?**
3. **Do You Help New Hires See the Big Picture?**
4. **Do You Show How Employees Matter?**
5. **Do You Collect and Share Stories?**
6. **Do You Make Your Orientation Program Interesting and Interactive?**
7. **Are You Designing It From the New Employee’s Perspective?**
8. **Are You Holding Your Orientation Program When It’s Most Understandable and Beneficial?**
9. **Have You Broken Your Orientation Program Down Into Digestible, Bite Sized Chunks?**
10. **Are You Offloading As Much Information As Possible To Your Intranet?**
11. **Do You Have a “Mentoring Program?”**
12. **Are You Making It Easy For New Employees to Tell You How They’re Doing?**
13. **Do You Help Your Supervisors and Managers Do Their Part Well?**

**About the Author:** David Lee is the founder and principal of HumanNature@Work. He is an internationally recognized authority on organizational and managerial practices that optimize employee performance, morale, and engagement. Mr. Lee is the author of *Managing Employee Stress and Safety*, as well as several dozen articles on organizational and individual performance that have been published in a number of trade journals in North America, Europe, Australia, and Asia. He has held positions as a clinician and trainer in the healthcare field and as a supervisor and trainer in the corporate world.

In addition to his own research and work with organizations, David Lee's work draws from a wide range of disciplines, including neuroscience, evolutionary biology, psychology, peak performance technology, anthropology, accelerated learning, and marketing. The unifying theme of his work is this: World Class management, customer service, and marketing all depend on your knowledge of human nature. The greater your understanding of human nature, the greater your effectiveness at optimizing employee performance and creating brand-building customer service.

For articles by David Lee on improving morale, attracting and retaining employees, and creating a Magnetic Employer Brand™, go to [www.HumanNatureAtWork.com](http://www.HumanNatureAtWork.com)