Onboarding – Best Practices

A Clear Model for What Needs to Be Covered

Strategy, Performance, Change and Human Capital Management

Management Consulting | Executive Coaching | Learning & Development

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Purpose

This onboarding model is designed to ensure successful acclimation and integration for new hires into the organizational culture and reinforce alignment with leadership and the organization's strategic priorities. It is a proactive process intended to substantially improve a new hire's ability to understand the culture, contribute to the team, develop meaningful relationships, understand the leadership team and perform at maximum level. Research shows that onboarding leads to increased retention rates and higher productivity and effectiveness on the job.

Best practices dictate a focus on the following five pillars: (1) Organizational Culture (2) Vision and Direction of Leadership (3) Team Dynamics, Communication, and Conflict (4) Business Systems, Processes and Performance Deliverables and (5) Specified Defined Goals and Ongoing Expectations. Each of the five pillars has six questions/areas associated with it, and typically the plan/model is applied over a three to five-month period. By entering into this mutually engaging process, the leadership team and the new hire demonstrate a commitment to maximizing human capital and advancing organizational success. These efforts serve to acclimate new hires to an organization's culture, team, and leadership as well as enhance communications and capitalize on organizational talent and competence.

Process

Within one week of the start date, the new hire should be made aware of the onboarding process that he/she will complete. This could occur in an opening 30-minute meeting where the immediate supervisor reviews the onboarding plan with the new hire, discusses the five pillars and outlays a timeline and method for execution. During this first meeting, the supervisor and new hire are simply discussing the onboarding plan; you are not yet getting into details and responses for the five pillars. At the end of this initial meeting, the new hire leaves with the first pillar questions and focus points only. Each pillar will then be addressed during distinct and specified periods. As the supervisor, you should resist any temptation to throw it all at the new hire at once.

We recommend that supervisors spread the meetings, data collection and assessments over a three to four-week period and hold a 90-minute meeting at each interval. The supervisor will discuss the purpose and provide the corresponding questions/focus points for each pillar at the beginning of the meetings and get preliminary responses. Then the supervisor provides the new hire the time span of three to four weeks to observe, interact, engage, understand his/her work, assess, and communicate with others.

During the next scheduled meeting, the supervisor should follow up on the questions/focus points from the prior pillar meeting and determine if there are any necessary changes, modifications or adjustments to be made. Discuss the prior pillar at the beginning of each meeting and then delve into the next (current) pillar details. Discuss the pillar, get preliminary responses, document and then send the new hire on and meet again in a few weeks. This process continues until the fourth pillar has completed. At the beginning of the fifth pillar, the supervisor and new hire should review everything and then establish defined goals and expectations that outline how you will both move forward for success!

The entire process, and documentation to support the process, should be concluded in about three to five months. Afterwards, it is expected that you both will proceed with the defined and documented information, goals and expectations to achieve success! The relationship and organization will indeed be much better for it.

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Finally, if you find that it takes longer than expected to work through each pillar or if there appear to be gaps in understanding or a need for reinforcements, it would be completely appropriate to extend the onboarding process or to circle back, even after the first several months, and revisit these pillars and the questions within them. The goal is to ensure improved communications, clarify expectations for both parties and to maximize the new hire's ability to drive operational success. As such, what may have started as a three to five-month process can certainly be extended for longer periods as deemed necessary for sustained success.

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Pillar I - Organizational Culture	
1.	Describe the cultural environment you work best in.
2.	What is your definition of a high-performance culture? Please provide your individual definition and detail some elements that must exist.
3.	What are the top three supporting factors that must be present for you to succeed in your role?
4.	What are three factors that can undermine your success?
5.	What have you observed to be untapped opportunities for service coordination between your role and the others on your team?
6.	What strengths do you bring to a high-performance culture and team? How can you maximize those strengths?

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Pillar II - Vision and Direction of Leadership	
1.	What do you understand your director/supervisor/leadership team's vision to be, and what do you base this on?
2.	What are the strategic priorities for the ABC Division/Department (this is the specific division/department the new hire is assigned to), and how do the responsibilities attached to your role fit with these priorities? Have you identified any gaps or disconnects?
3.	What communication methods does the leadership team use to best communicate? What about your direct supervisor?
4.	What do you need from the leadership team and your supervisor specifically to be successful? What leadership style works best for you?
5.	How do you communicate your needs? Are you comfortable doing this in this environment?
6.	What does success look like to your director/supervisor/leadership team? What does success look like to you? Identify any gaps that you foresee?

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Pillar III - Team Dynamics, Communication, and Conflict	
1.	What is your definition of a team? What does the team need from you? What do you need from the team?
2.	How do you demonstrate that you are a team player? And, what are some immediate contributions you can make to advance the team?
3.	What obstacles exist, and how are you going to address these? What do you recommend?
4.	Feedback - What permissions do you grant your team members have to hold you accountable? What permissions have you been given to hold other team members accountable?
5.	What is your communication style and how does it fit with the team? Any gaps? What would you recommend?
6.	What is your conflict management style? Are you comfortable applying other styles as necessary to advance communications and trust with team members? How?

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Pillar IV - Business Systems, Processes and Performance Deliverables	
1.	Projects, Programs, and Proposals – what are the business and management processes that you are responsible for completing?
2.	To whom must you most coordinate? Collaborate? Communicate? What do you think is the best way to do this?
3.	What strategic alliances and relationships do you need to develop and maintain (internal/external)? How do you expect or hope to be introduced to key people?
4.	What services and programs do you need to navigate? Which ones do you need to help others navigate most?
5.	Ensure alignment between your position description and expectations and what you most spend your time on? Are changes necessary? Do you anticipate any problems?
6.	How will you make best use of the performance management process? How will you use our coaching conversations to your benefit (be sure that there is a performance management process or one is forthcoming. Remember, as a supervisor, you should have coaching conversations on at least a quarterly basis).

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Pillar V - Specified Defined Goals and Ongoing Expectations	
1.	Define/Clarify performance goals for the new hire. As a new hire, you are invited to help define or modify these goals so that you are better equipped to meet performance expectations.
2.	Define/Clarify goals for new hire to meet service standards (common standards and expectations for behavior that all team members are expected to deliver).
3.	Define/Clarify goals for new hire to meet leadership needs/demands and ensure that he/she can effectively communicate as necessary with superiors.
4.	Define/Clarify goals for new hire regarding interdepartmental requirements and policies.
5.	Define/Clarify what the new hire can expect from his/her leadership team/supervisor regarding resources, support, communications (this is a goal for the supervisor to be held accountable to create an environment for the new hire to succeed).
6.	Define/Clarify any other standards for performance or organizational goals that have not yet been covered.

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