FEBRUARY 2022

FOCUS REPORT:

ONBOARDING

Setting New Hires Up for Success Begins Before Day 1

Onboarding

Setting New Hires Up for Success Begins Before Day 1

BY PAUL NOLAN

"Be quick, but don't hurry," one of the many aphorisms from legendary basketball coach John Wooden that have been applied to business and life, is an ideal starting point for a discussion about onboarding.

If you accept the widely used definition of onboarding as the process of preparing new hires for a long and successful career at your company, then "be quick, but don't hurry," is as solid of a guideline as there is.

Andy Hill played on three of Wooden's UCLA championship basketball teams in the 1970s before transitioning to a career in media, ultimately rising to be president of CBS Productions. In 2001, Hill published a book exploring the teachings of Wooden and their application to success in all walks of life. Its title: "Be Quick, But Don't Hurry."

"Impatience and unrealistic goals will sabotage a talented group of individuals in any workplace," Hills states. "Set your sights too high and expect immediate attainment of your goals, and invariably, you will never reach your destination."

Wooden understood the importance of quickness in basketball, but not at the expense of control. "Otherwise, you will have activity without achievement," he told his players. "I don't care for activity without achievement."

"Activity without achievement" describes a lot of companies' onboarding process. Gallup reports that only 12% of U.S. employees say their company does a good job of onboarding. Nearly one in five employees say their most recent onboarding was poor—or that they received no onboarding at all.

Being Time-Crunched Is No Excuse

Managers who insist on pushing through a poorly structured onboarding process with hopes that their new hires are talented enough to make up for their slapdash approach should

ponder a question that Wooden routinely posted on the team bulletin board: "If you do not have time to do it right, when will you have time to do it over?"

Time — or lack of it — is what many managers point to as the cause for pushing forward with onboarding they know is less than ideal. Add to that the fact that today's onboarding process is handled all or mostly virtual due to COVID keeping offices empty, and you've got a situation where new hires feel unsupported and uncertain about their decision to take the job.

"It's pretty much a wing-it world," said Bill Bartlett, executive vice president of franchise business at Sandler, a global provider of leadership training and professional development. "The unfortunate thing is the employees we hire have resumes that are still on the street. If you don't live up to the onboarding process as much as you lived up to selling them on the company, then someone waves a job in their face and they leave because you've let them down."

The truth is those who don't do onboarding right often don't get a chance to do it over — at least not with the same new hire. The Society for Human Research Management (SHRM) reports that up to 20% of employee turnover happens in the first 45 days, and one-third of new hires look for a different job within the first six months. (See "Onboarding As a Retention Tool" on page 10). Gallup reports that employees who say they had exceptional onboarding experiences are 2.6 times more likely to be extremely satisfied with their workplace. With continued headlines about workers resigning in record numbers, managers must take every measure possible to retain the people they hire.

Begin Before the Beginning

Effective onboarding is the byproduct of planning. Wooden, a stickler for preparation, said, "I don't think I was a fine game

Foster a Community of Connection from the Start

The relationships new hires make within a company in their first 90 days is a key indicator of long-term success. Research by the [Institute for Corporate Productivity](#) (i4cp) shows that "initiating, engaging and refining specific kinds of relationships when joining an organization and continuing to prioritize network development throughout the transition is a critical differentiator."

Harvard Business Review research shows that the 10% to 15% of workers in a new position that became well-connected in one-quarter to one-third of the usual time, reap the benefits of rapid productivity, innovation, higher engagement and lower risk of departure. "These fast movers showed that people making transitions today don't have the luxury of allowing their network connections to form serendipitously. To be successful, you (and those who onboard you) must be intentional," the HBR report states.

Yet, only 20% of companies surveyed by i4cp indicated that helping new hires establish critical organizational networks is an objective of their onboarding process. Fostering meaningful relationships within the company should be an objective of every onboarding program. It is a responsibility for both the employer and the employee.

Fast movers pursue a broad network of colleagues and build relationships within the first 60 days. i4cp recommends identifying people in five categories — formal leaders; stakeholders; colleagues in support roles; direct reports/teams; and peers. Set a meeting with members from each of these to learn about their role and needs. Learn how they prefer to work, offer help and build rapport.

Fast movers should position their expertise to align with others' goals and objectives. People will engage with you if what you know can help

them. Fast movers should be careful to remain modest and not oversell themselves.

Leaders should develop a networks-first mind-set, particularly in today's mobile and remote work world. They can foster connections by promoting the sharing of expertise in meetings, creating a formal mentor program that pairs new hires with veterans, and continuing onboarding efforts well into the first year.

FEATURE STORY

Onboarding

coach. I think I was a good practice coach." He pointed out that he seldom left his seat during a game.

Sales managers who onboard effectively will field a team of well-prepared reps they can trust in critical situations. Too often, a company's leaders have not put in the prep work to determine how long a comprehensive onboarding process should take and what competencies should be taught, says Beverlie Heyman, director of sales enablement at Bigtincan, a sales readiness platform.

A "Blueprint for Better Sales Onboarding" published by Brainshark, which Bigtincan acquired last year, states the first step is to establish an onboarding timeline. The guide recommends that an onboarding timeline mimic the company's sales cycle, which Heyman said surprises some clients.

"They have a body in a seat and they want to make sure that person is producing as quickly as possible. I'm not going to boast that we can change onboarding from four months to one month, but if you can change it from four months to three months, and you have 25 new hires coming through the system, that's 25 months of revenue you can pick up over the course of time," she said.

Know Your Required Competencies

Once a timeline has been established, it's vital to have a good understanding of the skills that are necessary to move through the sales cycle. Bigtincan's onboarding blueprint recommends categorizing these competencies into buckets such as:

- Understanding how to present the solutions the company offers
- Tasks involved, including prospecting, writing proposals and involving solution consultants or marketing support materials
- Knowledge of the CRM system and how to properly use it
- Content comprehension (i.e. competitive intelligence, fact sheets, videos to share, structure of contracts and pricing
- Displayed comprehension of the methods used to present information (product positioning, product demos and closing a deal)

"If you ask your A players to walk through the steps of a sales cycle, and then ask the same of C players, you can definitely identify the gaps that the latter are missing," Heyman said. "As you build your list of onboarding competencies, be sure to include all of those steps that lead to your A players' success."

In the current world of working (and onboarding) virtually, it is imperative to have a collection of recorded video training sessions. Identifying the core competencies that are necessary

for sales success within your company will help you structure the content of your on-demand training videos. Doug Stephen, president of enterprise learning for channels at CGS Inc., an applications, learning and outsourcing company, describes this as a "library of TED Talks" from existing employees on how they made advancements in sales experiences. Asking top-performers to record these talks is a means of recognizing them in front of peers.

Metrics Are a Must

Once competencies have been identified and placed into training phases, it's time to develop a means of measuring whether new hires have achieved the competencies in each phase. "If you have a nine-month trajectory, you don't want to be at the ninth month when you realize a person is struggling with certain competencies," Heyman said.

For example, if an important milestone for Phase 1 is to demonstrate mastery of a sales whiteboard, new reps can record themselves moving through that stage of a presentation and submit it for managers to review. They may wish to have a peer coach or mentor review it before submitting a final version to a manager.

"Part of the challenge with our new clients is they don't know what metrics to measure," Heyman said. Managers should reverse engineer the sales process to gain an understanding of what can be measured. How many prospects are needed in the pipeline to close X amount of deals? What discovery questions should be asked?

David Gosen, chief revenue officer of Piano Software Inc., a provider of personalization, analytics and customer experience technology, says his company uses Gong and Chorus to analyze customer interactions, during onboarding as well as after reps have settled into their sales career.

> ## "In a simple way, it's about will and skill. Does our team have the will to do it, and do they have the skill to do it?"

David Gosen, chief revenue officer
Piano Software Inc.

👤 undefined	☰ All Enrollments ▾	◷ Completed	◷ Incomplete	◷ Completion %
Bo Koster	25	16	9	64%
Carter Jolt	21	6	19	10%
Christina Thompson	16	26	4	75%
Tim Sullivan	16	4	14	13%
Jennifer Conroy	14	1	13	7%
Conner Robinson	9	14	4	56%
James Broderick	9	2	7	22%
Carlos Martin	7	17	2	71%
Alex Marino	6	8	5	17%
Jacob Ricci	6	1	5	17%

SOURCE: BIGTINCAN

Creating an onboarding scorecard will help track each person's progress in acquiring core competencies on the route to sales readiness.

"It gives us great metrics in terms of the longest time someone speaks during a discussion, what key words are coming up, how many questions the salesperson asked versus the customer. We are a data-driven organization. This is when science becomes really important in what we do," Gosen said. "We transform our customers' business through data. We can use similar tools and techniques to transform the success, productivity and effectiveness of our salespeople."

Onboarding Affects Everyone

Connected Commons, a consortium of major employers and leaders, reports the fallout from failed onboarding reaches far beyond the new hires themselves. When people underperform and leave, it hurts their coworkers' productivity. Research shows that, on average, most employees are relied upon by five to 12 colleagues.

If a departure by someone who has five teammates that rely on them in some fashion drags on those co-workers' performance by 5% for six months (the time it takes to replace and onboard a replacement), Connected Commons says a conservative loss estimate is $845,000 for inefficiencies in the network. That doesn't take into account the cost of recruiting and training a replacement.

"If you don't have an integrated, controlled, well-laid-out curriculum for onboarding, then you're not setting up your most important people — your employees — for success," said Gosen. "In a simple way, it's about will and skill. Does our team have the will to do it, and do they have the skill to do it?"

If your onboarding process has inefficiencies, the time to rectify that is now. As Coach Wooden said, "Failure is not fatal, but failure to change might be." **smm**

Peer Mentorships Can Be Uniquely Impactful

In addition to significant interaction with a direct manager throughout the onboarding process, many companies assign a new hire to one or more peer mentors. The traditional concept of mentoring pairs a new employee with a senior member of the team. That works, but peer mentors don't have to have several years of experience under their belt to be an effective component of the onboarding process.

Research and real-life experience shows that peer mentoring is good for both mentors and mentees. Mentees get help with self-directed learning and access to another colleague's insights while building supportive relationships within the company. Mentors develop leadership skills and, by virtue of being asked to be a mentor, are recognized for their hard work and accomplishments.

Peer mentoring provides a more informal setting in which new hires can ask questions, express concerns and share thoughts about what they are experiencing as they settle into their job. A peer mentor who is closer themselves to their onboarding experience may have insights and stories that more experienced team members do not.

Peer mentoring should be more about providing psychosocial support and showcasing a collaborative attitude than evaluating a new hire's work and pointing out mistakes. The best peer mentors are active listeners, empathetic and generous with their time. At the same time, they are not hesitant to provide direct feedback.

In the current environment of remote work, peer mentorship is an increasingly important component of ensuring employee wellness. Although part of its effectiveness lies in the less formal construct of the relationship, peer mentorships should include scheduled check-ins, formal training for mentors, guidance from managers and 360-degree evaluations.

Getting a Good Start

Quick tips for better onboarding

Companies summarize their onboarding objectives in many ways, but ultimately it comes down to putting new hires in a position to succeed. Here are some solid starting points we found in our discussions and research.

Preboarding – Onboarding should start before an employee's first day. Recruitment expert Anja Zojceska stresses the importance of preparing not only the new employee, but the employee's direct manager, peers and direct reports before the first day at the company. A first day's itinerary should be sent to the employee ahead of the first day, along with other documents that are routinely presented on the first day, such as a company handbook or HR policies.

Make them feel part of the team on Day 1 – This can be especially challenging in the current environment where no one is reporting to an office, but over the past two years, successful teams have developed ways to foster collaboration and maintain camaraderie. New hires should be introduced to the full team through a virtual call and made aware that everyone is invested in the new employee's success, says Michael D. Watkins, author of "The First 90 Days."

Assess your onboarding tech tools – Companies can become complacent about the technology they use to communicate with and train employees. Negative experiences with tech tools may be most impactful when someone is starting at a company. It can result in unnecessary challenges early in their tenure and create doubt in their minds that management is committed to their success.

Create a list of required competencies – You should be able to present new hires with a list of skills that your top performers possess and an agenda that shows when and how they will be reviewing and learning those skills during the onboarding process.

Encourage individuality – It was 2013 when London Business School Professor Daniel Cable wrote about "personal-identity socialization," for MIT Sloan Management Review. "When newcomers are 'processed' to accept an organization's identity, they are expected to downplay their own identities, at least while they are at work," Cable wrote. "Personal-identity socialization involves encouraging newcomers to express their unique perspectives and strengths on the job from the very beginning and inviting them to frame their work as a platform for doing what they do best." Seems like advice that remains sound some nine years later. **SMM**

THE POWER OF ONE

Possibility
S O A R S
Eco Drive | Power with a purpose

THE NAVIHAWK

CITIZEN
BETTER STARTS NOW

MODERN
GEMINI

BULOVA
BOLD *AT* HEART

CARE FOR THE OCEAN

Alpina
1883 GENEVE

National Park Foundation

SEASTRONG DIVER GYRE GENTS
Swiss Professional Diving Watch
Environmentally-Friendly Timepiece – Made with Recycled Plastic

INDEPENDENCE, PERSEVERANCE, HERITAGE.
us.alpina-watches.com

FREDERIQUE CONSTANT
GENEVE

LIVE YOUR PASSION
CLASSICS
QUARTZ LADIES
us.frederiqueconstant.com

DONORS CHOOSE Proud Classroom Supporter

REWARD YOUR BEST WITH ICONIC BRANDS
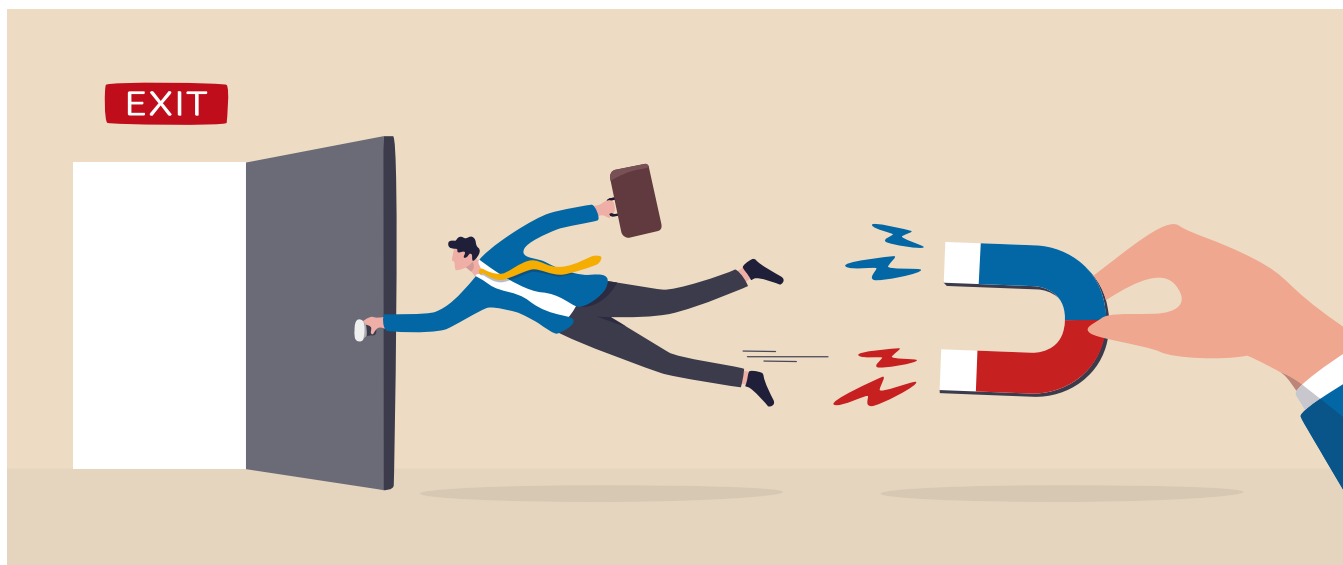
THE POWER OF ONE FROM CITIZEN WATCH AMERICA

ACCUTRON   Alpina   BULOVA   BULOVA CLOCKS   CARAVELLE   CITIZEN   CITIZEN CLOCKS   FREDERIQUE CONSTANT GENEVE   HARLEY-DAVIDSON

WWW.CWACORPORATESALES.COM

Onboarding As a Retention Tool

It may be discouraging to be concerned about losing an employee at the same time you're bringing them on board, but that's the reality of it. The Society for Human Research Management (SHRM) reports that up to 20% of employee turnover happens in the first 45 days. One-third of new hires look for a different job within the first six months.

Clearly, first impressions matter. New employees who go through a structured onboarding program are 58% more likely to be with the organization after three years, according to The Wynhurst Group, a Washington, D.C.-based coaching and consulting firm.

"The problem is that managers' lives are busier than ever, so it's simply not that easy to make sure an employee's first few months at your company are as welcoming, stimulating and productive as possible," consultant and business book author Keith Ferrazzi stated in an article for Harvard Business Review. That was in 2015. If anything, managers have become stretched even thinner since then, and onboarding continues to be neglected as the effective retention tool it can be.

Ron Carucci, co-founder and managing partner of leadership development and strategy consultancy Navalent, says the most effective companies onboard new hires for the duration of their first full year on the job. Even if a new employee has years of experience, they need to have clarity about what success looks like at their new company.

"New hires with deep areas of expertise can become insecure when they suddenly feel like beginners," Carucci states in an HBR article on onboarding as a retention tool. Setting up early wins and emphasizing a feeling of community is vital for new sales reps.

"If you want to retain the talent you spend good money to acquire, make sure a new hire's first year is positive and productive. Those that invest time and effort in their new employees reap the benefits," Carucci states.

If you thought enough of someone to hire them, it makes sense to invest enough in them to keep them. **smm**

....

Gallup reports that new employees typically take **up to 12 months** to reach peak performance potential, yet many companies' onboarding process continues to be **30 days or less**.

Only 29% of new hires say they feel fully prepared and supported to excel in their new role after their onboarding experience.

Reward your employees

Rewards | Recognition | Wellness goals

Let them choose how they spend their reward!

Anywhere Visa® debit is accepted in the U.S.

Customize your orders

– Add logo (fee applies)
– Embossed message
– No minimum order

– 10 card designs
– Custom carrier message
– Load amount ($10 – $1,000)

Easy online ordering

usbankrewardsconnect.com/recognition

usbank®

Offboarding Is As Critical As Onboarding

Companies can learn valuable lessons from departing employees

While most managers recognize the importance of helping new hires be productive as quickly as possible, too many ignore the value of getting insights from workers who are leaving for another company.

The exit interview, which falls at the opposite end of the onboarding process, provides an ideal opportunity for managers to get candid comments about leadership and corporate culture. When structured and timed properly, an exit interview can provide valuable information about what competitors are offering, reinforce a company's commitment to listening to employees—even when they are departing—and gain clear direction on how to reduce turnover.

Personio, an HR software provider, emphasizes the importance of providing a departing employee a clear summary of what topics will be discussed in an exit interview and its overarching objective. This helps them prepare their remarks and makes it clear that you desire an open conversation in which their opinions are welcomed and will be kept confidential.

Interview After the Exit

It's standard practice to conduct an exit interview during an employee's final week. Work Institute, a provider of employee engagement and retention resources, states that timing is the

biggest mistake companies make when it comes to conducting exit interviews.

"Studies have shown that exit interviews conducted two to six weeks after termination tend to be richer, more balanced and more helpful in identifying patterns in responses," a Work Institute report states. "That makes it more likely to identify appropriate action steps that are more likely to result in reduced turnover, improved productivity and higher employee engagement within the organization."

Giving a former employee a couple weeks on their new job allows them to process their employment experience at the previous job as well as their reasons for leaving. It removes some of the emotion and leads to more accurate and actionable answers that companies can use to affect positive change and reduce turnover.

Providing a departed employee an opportunity to complete a written survey before an exit interview may make them feel more comfortable providing detailed answers. Also, reading their thoughts prior to a meeting will help you develop questions that guide the conversation.

Who Should Conduct an Exit Interview?

In a study of 88 executives and 32 senior leaders from 210 organizations in 33 industries, *Harvard Business Review* found that 70.9% of exit interviews were handled by HR departments; 19% were completed by the employees' direct supervisor; 8.9% delegated the job to the direct supervisor's manager; and 1% used third parties.

Many HR consultants advise against an exit interview being conducted by a direct supervisor. A departing employee is more likely to reveal problems with leadership or corporate culture to an impartial HR representative than to a supervisor or a supervisor's manager. Other options include a neutral manager or a mentor whom the departing worker trusts.

Exit Interviews for Transitioning Employees

Don't neglect to complete exit interviews for workers who are leaving a department but remaining with the company. Insights regarding management effectiveness, a department's culture, and whether workers feel heard or see a viable career path can be invaluable to department heads.

"A final discussion with a boss is anything but an exit interview, even if that is how it is described," states a Personio post on the topic. "The best-case scenario here would be a bit of small talk; the worst, a settling of scores."

No matter who conducts the interview, that person should be trained in active listening, empathetic and not combative. It's vital to let the interviewee know their opinion is important and could lead to actionable decisions.

What to Ask

Rule No. 1 for exit interviews is don't shy away from tough questions, but don't ask questions you don't want candid answers to. An obvious purpose of an exit interview is to discover what led an employee to seek a new job. Answers to why someone is leaving could reveal a lack of growth opportunities within your company or ineffective training, or it simply may show the departure is due to an opportunity that your company could not match.

Questions should include what was done well within the employee's department and what could be done better. The worker should also be asked if they had ample opportunity to voice criticism and suggest change without backlash. Did they feel their voice was heard, and did they have sufficient access to their direct supervisor? Was the overall corporate culture positive or negative? Did they receive enough direction—from onboarding through their tenure at the company? Do they feel they were placed in a position to succeed? Was there a good blend of a team objectives and individual goals? What led them to look for another job? Would they recommend the company to a friend? Do they have suggestions for what to look for in their replacement?

Other than asking about a direct supervisor, avoid questions about specific individuals. Also, don't address office gossip, don't express your opinions, and don't use an exit interview as an opportunity to ask the employee to reconsider.

Personio states that consistency in the questions asked of departing employees is important. "If the same criticisms based on the same questions come up repeatedly, that would serve as an immediate signal that something is wrong. In addition to that, it helps to check to see if any of the initiatives you have taken are then reflected in feedback from future ex-employees." **smm**