



Onboarding Experience Guide 2020

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the onboarding continuum

The Harvard Business Review describes Onboarding programs as typically falling into one of the four categories. Initiatives and support range from little or no support to significant investment.

Sink or swim

Succeed independently or fail completely

Active Assimilation

Making efforts to help people understand organizational culture and politics; enculturation, led by Senior level staff and coaches

Basic Orientation

Basic introductions to support structures; tactical and transactional; introduces "lay of the land," conducted by Admin and Operational staff

Accelerated Integration

Investing resources in bringing people up to speed quickly, including personal-identity and organizational socialization; includes all components of Orientation and Active Assimilation



The importance of Onboarding, while philosophically accepted by many, fails in practice simply because the keys to success take time and personal investment on the part of both the part of the new executives and organizational leaders. Today, an entirely new level of intention is required.



Toolkit for Successful Onboarding

Following are recommendations for different levels of Onboarding:

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○ In the case of today's "new normal" with travel restrictions, social distancing, remote hiring and management, virtual tours can replace introductory site visits.
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- In-person New Leaders Assimilation sessions can occur via video meetings. Previously where providing Mentors or Transition Coaches at the start may have been the exception, today's environment may require those offerings to become standard practice.



For the Organization: *Levels of Onboarding*

	Basic Orientation	Active Assimilation	Accelerated Integration
I. Assuming Operational Leadership	<ul style="list-style-type: none">• Operational Plans• Detailed agenda for first week	<ul style="list-style-type: none">• Structured introduction to key business areas• Introductory visit to key company locations• Plan and expectations outlined for first 30 days	<ul style="list-style-type: none">• Opportunity to sit in on critical business meeting before day one• Immersive experiences in unfamiliar areas of the business (e.g. rotations, onsites)• Plan and expectations outlined for 30-60-90 days

For the Organization: *Levels of Onboarding*

	Basic Orientation	Active Assimilation	Accelerated Integration
II. Taking Charge of the Team	<ul style="list-style-type: none">• Career histories for key team members	<ul style="list-style-type: none">• Performance and assessment data on team members incl. coaching reports• Briefings to provide confidential insight on team members	<ul style="list-style-type: none">• Briefings on team dynamics and history.• Facilitated workshop with the team (e.g. new leader assimilation) to also include a Team Comparison and Development Assessment

For the Organization: *Levels of Onboarding*

	Basic Orientation	Active Assimilation	Accelerated Integration
III. Aligning with the Stakeholders	<ul style="list-style-type: none">• Relevant organizational charts; roles and responsibilities	<ul style="list-style-type: none">• List of key internal stakeholders• Introductory meetings with Internal stakeholders	<ul style="list-style-type: none">• List of key external stakeholders• Briefings on stakeholders (e.g. their agendas)• Pre-boarding—prior to start meetings with Board Members or key external stakeholders

For the Organization: *Levels of Onboarding*

	Basic Orientation	Active Assimilation	Accelerated Integration
IV. Engaging with the Culture	<ul style="list-style-type: none">• Statement of Company, Philosophy and Values• New hire gift/SWAG	<ul style="list-style-type: none">• Briefing on culture and “ways of getting things done”• Structured events to understand culture• Personalized new hire gift/SWAG	<ul style="list-style-type: none">• A “cultural interpreter” or Mentor to provide insight External Executive Transition Coach• Assessment to highlight differences between current and former cultures, including understanding of type of transition: Start-up, Turnaround, Accelerated Growth, Realignment, Sustaining Success

For the Organization: *Levels of Onboarding*

	Basic Orientation	Active Assimilation	Accelerated Integration
V. Defining Strategic Intent	<ul style="list-style-type: none">• Business Plans• History of the company and past performance	<ul style="list-style-type: none">• Strategic plans for the business (e.g. long-term priorities)• Conversations with key stakeholders on strategic challenges	<ul style="list-style-type: none">• Opportunity to participate in an off-site strategic meeting• Dedicated workshop on strategy and existing plans

For the Organization: *Levels of Onboarding*

	Basic Orientation	Active Assimilation	Accelerated Integration
VI. Organizational & Personal Identity Socialization	<ul style="list-style-type: none">• Welcome Message and Bio	<ul style="list-style-type: none">• Help new leader identify their authentic strengths: including a storyboard of personal highlights, when at best, in roles playing to strengths, etc.• Share Leader's Journey and Personal Highlights Storyboard with key stakeholders	<ul style="list-style-type: none">• Highlight organizational identity from senior leaders and star performers• Discuss opportunities for new leader to apply best self and authentic strengths in context of new organization• Design a personal learning plan Integrate an Assessment Tool for Development including a Manager Coaching Guide

For the New Leader: *Checklists*

	Checklist for Yourself	Checklist for Your Network
Personal Inventory and Support Systems	<ul style="list-style-type: none">• What are your strengths? What are your vulnerabilities? Blind-spots? How do you plan to compensate for them?• What personal disciplines do you need most?• What can you do to have more control over your environment?• What can you do to ease your family's transition?• In which area will you need the most support-technical, cultural, political or personal?• Develop your Learning Plan—what do you want to learn and how will you go about it?• Assess and align for strategy and planning Identify early wins• Assess continuously: seek feedback, ask for help	<ul style="list-style-type: none">• Create a Relationship Map and Influence Landscape—identifying allies, influencers, contrarians• What are your priorities for strengthening your network?• Identify sources of power: expertise, control of information, connections to others, access to resources, such as budgets and rewards, personal loyalty

For the New Leader: *Checklists*

	Checklist for Manager	Checklist for Your Team
Personal Inventory and Support Systems	<ul style="list-style-type: none">• Clarify expectations early and often• Take responsibility for making the relationship successful• Identify your manager’s areas of importance• Establish a relationship agreement• Pursue good reviews of those respected by your manager	<ul style="list-style-type: none">• Assess current members—most powerful question: <i>What do you think?</i>• Define team effectiveness: Visioning, Purpose, Values, Goal Alignment, Clarity of Roles and Expectations, Norms, Communications, Process Build Cohesion: Trust, Healthy Conflict, Commitment, Accountability, Collective Results• Engage People: Connect, Shape, Learn, Stretch, Achieve, Contribute Beyond Self• Diagnose, manage and sustain change• Understand the Change Continuum: <i>Unawareness to Awareness to Understanding to Acceptance to Commitment</i>• What are the From-To Behaviors?• What is the Pain and Gain? The Driving Forces? The Restraining Forces?• Apply the Disciplines of Change Sustainability:<ul style="list-style-type: none">○ Validate Readiness○ Hand off the project to the business○ Create a discipline of accountability○ Establish learning and renewal

For the New Leader:

Critical Questions for Stakeholders

- Tell me about yourself.
- Give me your read on the situation—strengths, opportunities, weaknesses, threats of the organization.
- What strengths/capabilities required? Which exist now?
- What do you see as priorities? Lower? Untouchables?
- What resources are available to invest against these?
- What will be signs of success?
- Tell me about control points: metrics, meetings, reports, systems, data, etc.
- Tell me about decision-making: who, what, when?

- What's the best way to communicate with you?
- (mode/manner/frequency/how should we disagree?)
- How will we work best together?
- What's the best thing I can do? What's the worst thing I can do?
- What did you do that was effective when you first joined? What would you have done differently?
- Understand types of conversations with direct reports and boss: situation, expectations, style, resource, progress, personal development

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Meet the Author— Laura Stanley



Onboarding and new hire integration have long been areas of focus for strategic HR leaders and hiring managers alike. Notable thought leaders from Harvard, MIT and other institutions define best practices and the case for accelerating integration, actions which reduce turnover and consequently save money, but equally return measurable revenue and profit growth,.

Laura Stanley developed the Onboarding Experience Guide to address the renewed and evolved emphasis on Onboarding given today's uncertain business climate due to Covid-19. Viewing these essential processes through a virtual lens can help ensure a more positive and beneficial experience.

"Onboarding programs are proven to improve new hire productivity, engagement and retention. With the frequency of in-person meetings reduced or off the table in our "new normal," our goal is to help clients and new leaders translate what have always been best practices, often in the form of in-person engagements, into robust virtual assessment and Onboarding programs that can be as effective as in person sessions."

