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**PREPARE FOR YOUR NEW  
EMPLOYEE'S SUCCESS BEFORE  
YOU START RECRUITING**

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**CHAPTER I**

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# Understand the Organization-Wide Benefits of a Total Onboarding Program: An Executive Summary

*A Total Onboarding Program can dramatically improve the performance, fit, and readiness for the job of every person who takes on a new role—both new hires and internal recruits. Onboarding helps to build, sustain, and perpetuate high-performing teams. More important, an organization-wide onboarding program for new employees, promotions, role shifts, and other transitions can be a culture-shaping sustainable competitive advantage.*

**O**nboarding is the process of *acquiring, accommodating, assimilating, and accelerating* new team members, whether they come from outside or inside the organization. The prerequisite to successful onboarding is getting your organization *aligned* around the need and the role.

- *Align*: Make sure your organization agrees on the need for a new team member and the delineation of the role you seek to fill.
- *Acquire*: Identify, recruit, select, and get people to join the team.
- *Accommodate*: Give new team members the tools they need to do the work.

## 4 PREPARE FOR YOUR NEW EMPLOYEE'S SUCCESS

- *Assimilate*: Help them join with others so they can do the work together.
- *Accelerate*: Help them and their team deliver better results faster.

Effective onboarding of new team members is one of the most important contributions any hiring manager or human resources (HR) professional can make to the long-term success of his or her team or organization. Effective onboarding drives new employee productivity, accelerates delivery of results, and significantly improves talent retention. Yet few organizations manage the different pieces of onboarding well, so most people in new roles do not get clear messages about what the team and the organization wants and expects from them. Even fewer organizations use a strategic, comprehensive, integrated, and consistent approach like the one described in this book.

Why? Because onboarding is not something you do every day, it's hard to get good at it. With deliberate practice, however, you can accumulate onboarding expertise. This book shows you the way, step by step.

In our work helping organizations get new leaders up to speed quickly, we have seen repeatedly that a primary cause of misalignment and disengagement of new employees is the way that most organizations split up their recruitment, orientation, training, and management efforts. In many cases, multiple uncoordinated players oversee discrete pieces of the onboarding process and make poor handoffs across those parts. Almost everybody has a story:

- People showing up to interview candidates without a clear picture of the position they're trying to fill, let alone what strengths they're looking for.
- High-pressure interviews that turn off exactly the sort of people the organization is looking to recruit.
- Closing the sale with a candidate who turns out to be wrong for the organizational culture.
- New employees showing up for the first day—and there's no one to greet them, no place for them to sit, no tools for them to work with, and no manager around to point them in the right direction.
- New employees getting off on the wrong foot with exactly the people they need to collaborate most closely with.
- New employees left to their own devices after day one because the organization has a sink-or-swim mentality.

## Understand the Organization-Wide Benefits

5

*I have witnessed a lack of collaboration, cooperation, and coordination between the recruiting lead, the human resource generalist, and the hiring manager, that actually caused a new employee to show up for her first day on the job, without anyone knowing it. I reported to the hiring manager, and was asked to take care of “onboarding” this new employee. I was embarrassed for the company, myself, and her.*

—PrimeGenesis Client<sup>1</sup>

A new employee’s failure to deliver usually stems from one or more of four things:

1. A *role failure* due to unclear or misaligned expectations and resources (preparation miss). For example, a new global head of customer service who was hired before division heads had agreed to move customer service from their divisions to a central group.
2. A *personal failure* due to lack of strengths, motivation, or fit (recruiting/selecting miss). For example, a new head of marketing who was hired with direct marketing experience that was woefully out of date.
3. A *relationship failure* due to early missteps (head start/early days miss). For example, a new employee aggressively challenged a colleague before he or she fully understood the situation, making that colleague reluctant to share information with the new employee after that.
4. An *engagement failure* due to early days’ experiences (management miss). For example, a new employee’s manager who was not around during the employee’s first month due to other priorities.

When any person takes on a new role, there is a risk he or she will be misaligned with the organization. When you compound this with the disruption inherent in all organizational transitions, it’s no wonder so many new employees fail or decide to leave in the first six months<sup>2</sup> and that as many as 50 percent of new employees fail to deliver what their organizations expect.<sup>3</sup> Often those failures or decisions aren’t apparent early on. But the seeds have sprouted, and it’s very hard to change the course down the road. A new job is a turbulent event for everyone.

## 6 PREPARE FOR YOUR NEW EMPLOYEE'S SUCCESS

*We've found that 40 percent of executives hired at the senior level are pushed out, fail or quit within 18 months. It's expensive in terms of lost revenue. It's expensive in terms of the individual's hiring. It's damaging to morale.*

—Kevin Kelly, CEO of executive search firm Heidrick & Struggles, discussing the firm's internal study of 20,000 searches<sup>4</sup>

Consider this case. A major consumer products company was experiencing high levels of new employee failure. It turned out the organization had three distinct groups each working to improve its own area of responsibility without paying attention to the others. Talent acquisition was focused on cutting expenses by increasing the use of contract recruiters. Human resources was focused on improving the organization's orientation program. Line management was implementing performance-based compensation to keep people more focused on the most important performance-driving activities.

We helped the organization get its hiring managers more involved in recruiting and orienting new employees throughout the process. The results were immediate and meaningful. Recruiting efforts became more closely aligned with hiring managers' expectations. Selection criteria became clearer. Hiring managers took a personal interest in their new employees' orientations and related activities. Candidates and new employees felt better about the organization at every step of the way, which resulted in increases in their effectiveness over time.

Because so many people have heard (or lived) these or similar stories, many organizations are looking for solutions. Many take recruiting, interviewing, and selecting more seriously. Many have utilized onboarding software or portals to manage hiring paperwork and tasks. Many hold managers accountable for the success of their employees.

All these are good things. Do them. But you don't need this book to tell you that.

This book and its Total Onboarding Program (TOP) can take your organization to a new level of effectiveness by improving and integrating the disconnected experiences and messages new employees get during the recruiting and on-the-job learning process. This is a powerful, vulnerable time in the life of an employee. It represents the most important *teachable moment* your organization will ever have with its employees. If you can plan and get each new employee and the organization in full alignment so that intelligent onboarding becomes

## Understand the Organization-Wide Benefits

7

part of your culture, you will make a material difference in your business results over time.

We are not reinventing the wheel. Most people understand or can quickly figure out the basics of acquiring, accommodating, assimilating, and accelerating new employees. Our core premise is that things work better when all efforts point in the same direction, integrated into one Total Onboarding Program (TOP). Onboarding gets your new employees up to speed twice as fast as separate efforts to recruit, orient, and manage. It enables you to get more done in less time by:

- Compressing recruiting, hiring, and assimilation time.
- Reducing hiring mistakes by making everyone, including prospective hires, fully aware of what the job requires—from the employee and from the organization.
- Reducing new employee *buyer's remorse* and greatly improving retention.
- Aligning new employees with key business strategies.

The primary requirement is that the hiring manager lead each new employee's onboarding experience all the way through. If you are a hiring manager, start by creating the overall TOP plan (per chapter 3). Get people aligned around that plan and its importance. Take primary responsibility for its execution and coordination across people and functions as you recruit. Give your new employee a big head start, and enable and inspire them. If you are the HR manager, help your hiring managers do those things. Here's a rough chronology:

Total Onboarding Program (TOP)				
Align>	Acquire>	Accommodate>	Assimilate>	Accelerate>
			<div>Day One</div>	IV. Enable and Inspire
		III. Big Head Start		
	II. Recruit			
I. Prepare				

- I. *Prepare for your new employee's success before you start recruiting.*  
Understand the organization-wide benefits of a Total Onboarding

## 8 PREPARE FOR YOUR NEW EMPLOYEE'S SUCCESS

Program. Clarify your destination by crafting your messages to the employee and the organization, and by creating a recruiting brief. Lay out your time line, and align stakeholders.

- II. *Recruit in a way that reinforces your messages about the position and the organization.* Create a powerful slate of potential candidates. Evaluate candidates against the recruiting brief while pre-selling and pre-boarding. Make the right offer, then close the right sale the right way.
- III. *Give your new employee a big head start before day one.* Co-create a personal onboarding plan with your new employee. Manage the announcement to set your new employee up for success. Do what it takes to make your new employee ready, eager, and able to do real work on day one.
- IV. *Enable and inspire your new employee to deliver better results faster.* Make positive first impressions both ways. Speed the development of important working relationships. Provide resources, support, and follow-through.

We created this approach out of the best of what we've seen and developed in PrimeGenesis' onboarding work since 2002 with a wide range of organizations around the world like American Express, Cadbury, Johnson & Johnson, MTV, Playtex, and others. The Total Onboarding Program has delivered breakthroughs in onboarding effectiveness and organizational success for hundreds of managers and client organizations.<sup>5</sup>

As you are working through the steps of onboarding, it's helpful to think about your role within the analogy of putting on a theater production in which your new employees are actors. You are:

- The *Producer*: While preparing for success and recruiting, think of yourself as the show's producer, assembling resources for the show.
  - Then, the *Director*: While giving your new employees a big head start before day one, think of yourself as the show's director. You will co-create the plan, make introductions, announce the show, and generally get things ready.
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## Understand the Organization-Wide Benefits

9

- Finally, the *Stage Manager*: After your new employees walk out on stage, you will continue to Encourage—Align—Solve—End (EASE) their way by managing context and the things happening around them.

The analogy is helpful because it gets you off the new employees' stage. You can't recite their lines for them. You can't hit their marks. Your job is offstage.

The balance of this Introduction outlines the steps of a Total Onboarding Program and the remaining chapters of this book. Throughout, "Total Onboarding Program plan" and "TOP plan" refer to your plan as the hiring manager, integrating all the steps of onboarding. The "personal onboarding plan" is the plan you co-create with your new employee regarding his or her own accommodation, assimilation, and acceleration.

Total Onboarding Program (TOP)				
Align>	Acquire>	Accommodate>	Assimilate>	Accelerate>
			<div><div>Day One</div><div><b>IV. Enable and Inspire</b> Resources, support, follow-through. (12) Speed important working relationships. (11) Make positive first impressions both ways. (10)</div></div>	
		<b>III. Big Head Start</b> Make your employee ready and able to do real work on day one (9) Manage the announcement to set new employee up for success. (8) Co-create a personal onboarding plan with your new employee. (7)		
	<b>II. Recruit</b> Make the right offer, and close the right sale the right way. (6) Evaluate candidates against the brief while pre-selling and pre-boarding. (5) Create a powerful state of potential candidates. (4)			
<b>I. Prepare</b> Craft your time line, write a recruiting brief, and align your stakeholders. (3) Clarify your destination and messages to the candidate and the organization. (2) Understand the organization-wide benefits of a Total Onboarding Program. (1)				

## Part I: Prepare for Your New Employee's Success Before You Start Recruiting

### Chapter 1: Understand the Organization-Wide Benefits of a Total Onboarding Program: An Executive Summary

This chapter describes the importance of a single, integrated Total Onboarding Program and serves as an executive summary.

## 10 PREPARE FOR YOUR NEW EMPLOYEE'S SUCCESS

### **Chapter 2: Clarify Your Destination and Messages to the Candidate and the Organization**

This is where we move from theory to practice. Start by stopping to reconfirm your organization's purpose, priorities, and desired results. How will your new employee contribute? Think through what went well and less well when you and/or your organization onboarded new employees in the past. Map out clear, simple messages about this onboarding: your message to stakeholders, your message to candidates, and your message to your new employee.

- *Manager:* Reconfirm context. Determine your messages.
- *Human Resources:* Help align messages with organization's direction.

### **Chapter 3: Craft Your Time Line, Write a Recruiting Brief, and Align Your Stakeholders**

This chapter is about sharing your thinking with others, getting their input, and deciding together how you are going to go forward. Start by crafting an onboarding plan that includes the work you did in chapter 2, a recruiting brief, and a TOP time line. Then get important players aligned around your plan. Investment of time here makes everything else more effective and efficient down the road.

- *Manager:* Create and get alignment around your TOP.
- *Human Resources:* Help align the hiring manager's onboarding plan with the overall organizational strategy.

## **Part II: Recruit in a Way That Reinforces Your Messages**

### **Chapter 4: Create a Powerful Slate of Potential Candidates**

Take charge of the employee acquisition process by laying out and implementing a comprehensive marketing plan that starts with your target and moves through where you are going to fish for new employees, the tools and resources you will use, and your time lines/milestones. Communicate, demonstrate, and live your employment brand every

## Understand the Organization-Wide Benefits

11

step of the way. Assemble a deep slate of strong candidates at the same time to give you options, so that you don't feel you have to close the sale with your lead candidate if it's not 100 percent right for everyone.

- *Manager*: Inform and guide recruiting efforts.
- *Human Resources*: Manage recruiting execution. Deliver candidates that fit.

## Chapter 5: Evaluate Candidates against the Recruiting Brief while Pre-Selling and Pre-Boarding

While candidates can focus on getting you to offer them a job and then take a step back to evaluate the opportunity, you must buy and sell at the same time. Make sure you are recruiting and interviewing in a way that communicates your employment brand. We use a strengths-focused, targeted selection/behavioral approach to interviewing with good success. We complete the interviewing process with formal post-interview debriefs, information gathering outside the interviews, and post-interview follow-ups with candidates to learn even more (and set up closing the sale later).

- *Manager*: Make the hiring choice—while pre-selling and pre-boarding.
- *Human Resources*: Manage the interview process. Provide a broader organizational perspective.

## Chapter 6: Make the Right Offer, and Close the Right Sale the Right Way

You know your organization is awesome. Just remember that a potential new employee may need to be convinced. So treat the offer as just one part of a strategic sale. The way you handle this and support your offeree's due diligence efforts will impact the way he or she feels about you and your organization, with implications far beyond whether the answer is yes or no. You want offerees to say "yes" if taking the job is the right move for them, their supporters, and the organization over time. You want a "no, thanks" if it's not.

- *Manager*: Close the sale. Support your new employee's due diligence efforts.

## 12 PREPARE FOR YOUR NEW EMPLOYEE'S SUCCESS

- *Employee*: Do a real due diligence.
- *Human Resources*: Support manager by preparing offer and supporting strategic selling efforts.

### Part III: Give Your New Employee a Big Head Start Before Day One

#### **Chapter 7: Co-Create a Personal Onboarding Plan with Your New Employee**

Co-creating a personal onboarding plan is the beginning of your working relationship. Listen, and demonstrate how much you value your new employee. Work together to think through the job and its deliverables, stakeholders, message, pre-start, and day one plans as well as personal and office setup needs. Clarify who is doing what next.

- *Manager*: Co-create new employee personal onboarding plan.
- *Employee*: Co-create personal onboarding plan.
- *Human Resources*: Provide tools and support.

#### **Chapter 8: Manage the Announcement to Set Your New Employee Up for Success**

Making the announcement is one of the most important things you can do to help make your new employee feel welcome, valued by, and valuable to an organization he or she can take pride in. Think through and implement these steps:

1. Map the stakeholders (chapter 7).
2. Clarify the messages (chapters 2, and 7).
3. Lock in the timing and wording of the official announcement.
4. Map out whom to talk to before the announcement, when and how.
5. Map out whom to talk to after the announcement, but before the new employee starts.
6. Implement, track, and adjust as appropriate.

## Understand the Organization-Wide Benefits

13

- *Manager:* Clarify and deliver messages. Set up new employee's pre-boarding conversations.
- *Employee:* Conduct appropriate pre-boarding conversations with stakeholders.
- *Human Resources:* Manage implementation of announcement.

## Chapter 9: Do What It Takes to Make Your New Employee Ready, Eager, and Able to Do Real Work on Day One

1. Accommodate work needs (desk, phone, computer, ID, payroll, forms, etc.).
2. Accommodate personal needs (family move, housing, schools, etc.).

Mind the details to give the new employee a first day that is in line with the opportunity/shared purpose and to put your new employee in a position to do real work starting day one.

- *Manager:* Ensure your organization produces a perfect day one.
- *Employee:* Clarify your needs and expectations. Get a head start on personal setup.
- *Human Resources:* Manage implementation of accommodation activities.

## Part IV: Enable and Inspire Your New Employee to Deliver Better Results Faster

### Chapter 10: Make Positive First Impressions Both Ways

Everything communicates. Pay attention to what people hear, see, and believe. Pay attention to the impact the organization is making on the new employee. Pay attention to the impact the new employee is making on the organization. Design the day one experience as you would a customer experience. Don't leave first impressions to chance, because while people don't always remember what others did or said, they always remember how they felt.

## 14 PREPARE FOR YOUR NEW EMPLOYEE'S SUCCESS

- *Manager*: Manage first impressions. Welcome. Introduce the new employee.
- *Employee*: Manage first impressions.
- *Human Resources*: Manage implementation of day one plan.

### Chapter 11: Speed Development of Important Working Relationships

Assimilation is a big deal. Doing it well makes things far easier. Getting it wrong triggers relationship risks. There are a couple of things beyond basic orientation that can make a huge difference. We suggest you set up onboarding conversations for your new employee with members of his or her formal and informal/shadow networks. Do periodic check-ins with those networks. If there are issues, you want to know about them early, so you can help your new employee adjust.

- *Manager*: Facilitate new employee assimilation initiatives. Be alert to challenges.
- *Employee*: Invest in assimilating into the formal and informal networks.
- *Human Resources*: Support. Coach new employee and manager. Provide required resources.

### Chapter 12: Provide Resources, Support, and Follow-Through

The first step in giving your new employee the resources and support he or she needs is confirming your own requirement and appetite for change. If all you need is for your new employees to assimilate into the existing culture, you can probably mentor them yourself or with an internal coach. However, if achieving the desired results requires a new employee to assimilate into and transform the team at the same time, you will need to bring in external assistance. (If insiders could transform your culture, they would have done so already.)

Make sure your new employee garners needed resources and establishes the building blocks of a high-performing team, as appropriate to his or her position:

1. What most needs to be accomplished (in place by day 30).
2. Clarity around what's getting done, when, by whom (by day 45).

## Understand the Organization-Wide Benefits

15

3. One or two strongly symbolic early wins (identified by day 60, delivered by month six).
4. The right people in the right roles with the right support (by day 70).
5. A communication plan implemented on an ongoing basis.<sup>6</sup>
  - *Manager*: Support. Mentor. EASE: Encourage—Align—Solve—End.
  - *Employee*: Build the team. Deliver results.
  - *Human Resources*: Support. Coach new employee and manager. Provide required resources.

## Follow Through

Just as onboarding starts long before day one, it ends long after the personal onboarding plan is executed. Follow through with your new employee to ensure ongoing adjustments and success or to redirect if things are not working. And check the process: audit, adjust, and plan improvements in anticipation of the next onboarding.

## How to Use This Book

This is very much a how-to book, designed to be used instead of read. The Total Onboarding Program is your framework—the starting point for effective onboarding. But you may also want to drill down in specific areas like recruiting and interviewing, and to take advantage of the many practical worksheets and resources in the book.

### Each Chapter

- *Ends with a summary and recommended actions*: You may find it useful to look at the end of chapter summary before you read the chapter in depth.
- *Contains forms and tools*: Many of them are filled out as examples in the text. Many are downloadable from [www.onboarding-tools.com](http://www.onboarding-tools.com) as Word documents so you can fill them in for your situation.

## 16 PREPARE FOR YOUR NEW EMPLOYEE'S SUCCESS

- *Includes a Master Class callout just before the chapter summary:* These provide ways to take your organizational knowledge and skills to the next level. They're pulled together into an organizational transformation approach in appendix I.

As much as possible, we tried to avoid jargon or consultant speak. Where we felt compelled to use special words, we included them in the glossary at the end of the book.

How you handle the acquisition, accommodation, assimilation, and acceleration of new employees communicates volumes to everyone. In many ways, this is one of the acid tests of leadership. If you follow the prescriptions in this book and stay focused on inspiring and enabling others to do their absolute best together to realize a meaningful and rewarding shared purpose, then those others will happily follow you.