



THE WHEN, WHY AND HOW OF ONBOARDING FOR RESULTS

Advanced onboarding tactics for
organizational success



Onboarding isn't a new idea or process — most organizations have some sort of orientation program for their new hires to introduce them to the company and slot them into their new role. Such programs can be as simple as completing new-hire paperwork over an afternoon or as complex as a multi-stage cohort program designed to build camaraderie and competency over employees' first few months.

What is new, however, is the idea of onboarding that takes place at specific moments in an employee's career — preboarding employees before their first day on the job, orienting them in their new roles as they're promoted to management-level positions and offboarding them if they leave the organization. Onboarding isn't limited to an employee's first few days or months; it's evolved into an end-to-end process designed to support both employee and employer. In fact, onboarding has now evolved to include not only new employees, but also new managers or internal promotions. By thinking of onboarding as an end-to-end process rather than something that happens just once, organizations demonstrate commitment to their employees, which in turn can help retention. Research shows that 1 in 5 workers over 35 are considering a new job — and 2 in 5 employees between ages 18 and 34 are also looking.¹ By continuously supporting employees with engagement, development and training opportunities, organizations will be able to keep them.

What does a total onboarding solution look like? Who are the stakeholders involved? How do organizations support new managers? How is the process different for employers that need to onboard multiple employees at scale thanks to a merger or acquisition? To answer these questions and more, the Human Capital Media Research and Advisory Group — the research arm of *Chief Learning Officer* — partnered with SilkRoad for the 2018 *CLO Advanced Onboarding* survey. We asked survey respondents about their organizations' onboarding practices to identify key processes and outcomes for end-to-end onboarding.

Key Findings

- Most organizations have a specific process for onboarding managers (both new hires and internal promotions), which frequently involves introductions to the organizational strategy.
- Video is frequently used both for onboarding new managers and onboarding at scale.
- Transmitting culture is both a top goal for onboarding new managers and the top challenge for onboarding at scale.
- 46 percent of organizations have a preboarding process; the top goals of preboarding are to decrease time to complete paperwork (64 percent) and increase productivity (57 percent).
- 57 percent of organizations have an offboarding process. While nearly all organization use exit interviews in offboarding (91 percent), organizational goals for offboarding are more centered around improving the employer brand (62 percent) than with preboarding.

Demographics

For complete demographics information, see Appendix

The 2018 *CLO Advanced Onboarding* survey received participation from 986 respondents at a variety of organizations, small, medium and large. Except where noted, data sets reflect the entire group of survey respondents.

¹Hopkins, C. (2017). *Study: Millennials in the Workplace – Which Stereotypes are True?* Fit Small Business.



The average length of the management onboarding process is three months

The management onboarding process

Over the next few years, it will be critical for organizations to have a process to ramp newly promoted managers into their new roles, especially as organizations look to promote from within more often to keep high-performing talent. For anyone to be successful in a new role, they'll need some sort of training. Learning leaders have cited leadership development as a top area they'll be focusing on over the next few years as they work on keeping new managers satisfied in their positions.²

More than half of all organizations (57 percent) have an onboarding process specifically for management-level employees. Who these employees are can differ: while most of this group onboard both internal and external hires, some organizations only have a management onboarding program for those managers hired from outside the organization (Figure 1). Having a specific process for external hires allows organizations to introduce new managers to their work culture and processes (which presumably internal hires would already know).

What exactly does onboarding look like at the management level? During the management onboarding process,

Figure 1: Organizations with an onboarding process specific to management-level employees

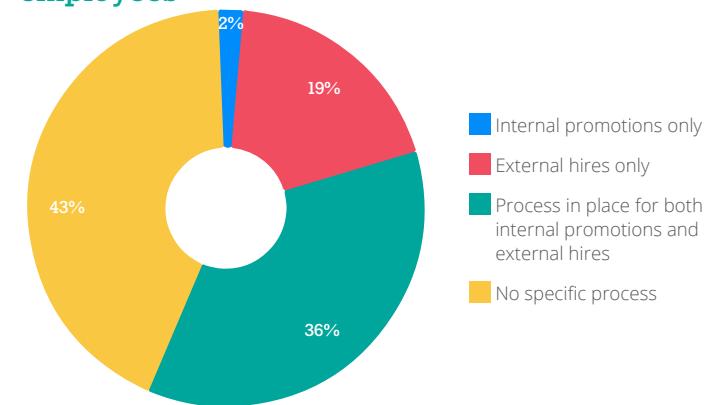


Figure 2: Information provided during management onboarding (both new hires and internal promotions)



organizations give new managers a wealth of knowledge about the workings of their new team and how their position fits with the overall organizational strategy. Management onboarding typically begins with introductions — both to the manager's immediate report as well as their new team. Management onboarding also consists of an introduction to the organization's strategy and goals, as well as its management methodology. Organizations typically orient all new managers with this high-level discussion of strategy — both new hires and internal promotions (Figure 2).

Occasionally, management onboarding will share similar processes to entry-level onboarding, giving new managers an introduction to the organization's history or giving information about benefits. New hires go through these orientation steps more often than internal hires. For example, while a third of organizations (30 percent) include organizational history in management onboarding for both new hires and internal promotions, 68 percent of organizations include this in onboarding for new hire managers only.

How long does the onboarding process typically take for new managers? Three-quarters of organizations onboard new managers for a month or more, while 22 percent onboard new managers for six months or more. The median length appears to be three months. This time allows managers to work with senior leaders and get comfortable in their new roles. This is also a longer period than organizations usually

²American Public University (2017). *Learning Priorities Benchmark: Leveling Up the Workforce*.



QUESTION:

What are the most important goals of the onboarding process for management-level employees at your organization?

ANSWER:

- To create connections and build teamwork
- Strategy development and alignment
- To provide training in foundational leadership skills

From the 2018 CLO Advanced Onboarding survey, open comments

take when onboarding new hires. The average time spent onboarding entry-level employees ranges from a week to three months.³

Senior leaders are some of the best resources for new managers, and many organizations involve their senior leaders in some part of the management onboarding process. Nearly three-quarters of organizations (73 percent) say their leadership is involved in coaching and mentoring new manager hires, which will help managers stay grounded and connected to the organization during the transition to their new roles.

How else are senior leaders involved? Often, organizations expect leaders to set goals and targets with managers. Reviewing organizational or group-specific metrics and measurement tools is also a top activity. At many organizations, senior leaders serve as faculty at corporate universities or for in-house classroom instruction (Figure 3). All these responsibilities aim for maximum knowledge transfer, ensuring that new managers get organization-specific knowledge directly from the best sources. Such involvement will be welcome news to managers, as only 23 percent of employees say their supervisors provide them with meaningful feedback, according to Gallup research.⁴

How do organizations structure management onboarding? The most common asset is the manager toolkit, used at 64 percent of organizations with a management onboarding program. These toolkits often include job aids, how-to instructions and copies of frequently used forms. Many organizations set aside time for new managers to participate in either in-class training or self-study webinars. More than

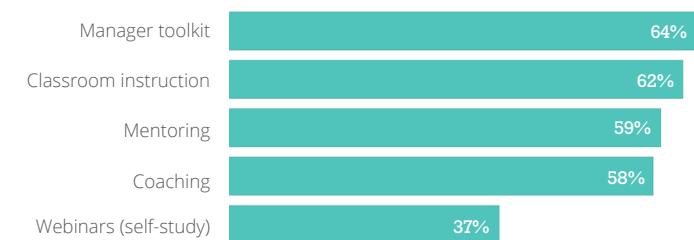
Figure 3: Leadership involvement in management onboarding



³A SilkRoad (2016). *The Who, How and Why of Onboarding*.

⁴Gallup (2017). *State of the American Workplace*.

Figure 4: Common strategies/methods/programs for onboarding management-level employees



half have formal mentoring or coaching processes, often involving senior leaders for one-on-one learning. When organizations onboard managers, they often use the same technology as when onboarding new hires: webinars, video, mobile applications or discussion forums.

What do organizations hope to get out of their management-level onboarding efforts? More than 6 in 10 (61 percent) want to improve employee engagement among new managers — which can trickle down to line-level employees if managers are sufficiently engaged. Also, more than half (59 percent) want to increase the success rate of employees transitioning from another position (Figure 4). The outcomes organizations receive from their management onboarding programs will help if companies ever need to onboard at scale.

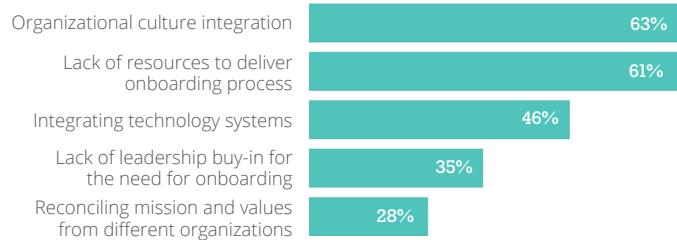
Onboarding at scale

The deal is closed, the contract signed. Two organizations are now one, and the parent company has absorbed a large group of employees into its own workforce. What happens now? All those new employees will need to learn new work processes and tasks. What does that training look like? Slightly more than 4 in 10 organizations (41 percent) say they've had to scale an onboarding process in the past three years, and they report unique challenges for scaling programs to address the needs of a large population.

To successfully scale onboarding for a large group of new employees, organizations need to leverage technology even more than they do when onboarding managers or new hires.

41% of organizations have scaled an onboarding process in the past three years.

Figure 5: Challenges/roadblocks when scaling the onboarding process

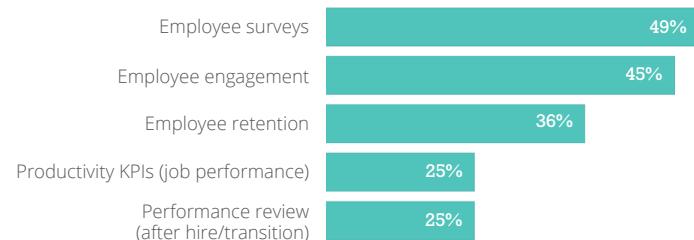


Organizations that have had previous experience onboarding at scale typically used video (51 percent), webinars (50 percent), onboarding portals (49 percent) and discussion forums (32 percent).

Of the organizations that have had to onboard at scale, only 44 percent say their scaling of their onboarding process was successful. Why didn't the efforts succeed at other organizations? It could be that organizations didn't have a clear goal or know exactly what they wanted to achieve. Another top challenge is cultural integration between the different worker sets (Figure 5). The importance of integrating workers into a new culture cannot be overstated; company culture is one of the stated reasons employees leave their jobs, according to Gallup.⁵ Organizations will need to have some sort of program in place to fit their new employees into the existing company culture; otherwise they'll end up acquiring employees only to see them leave.

Organizations will need to decide on what metrics they'll track

Figure 6: Challenges/roadblocks when scaling the onboarding process



⁵Gallup (2017). *State of the American Workplace*.

if they want to assess the outcomes of onboarding at scale. One in 4 organizations (27 percent) used no metrics to assess the impact of their onboarding programs (Figure 6). With a variety of metrics available to them, from retention rates to productivity KPIs, organizations should use everything at their disposal to integrate new employees into their way of doing things.

The preboarding process

Traditionally, the employees' first day on the job was given over to new hire paperwork, co-worker introductions and perhaps a tour of the facilities. All these tasks are necessary; however, as the speed of business advances, more organizations need their employees performing from day one and are actively looking for ways to speed up the typical first-day tasks.

In this regard, nearly half of respondents have turned to preboarding — addressing mundane or compliance tasks before employees start work so they can be better prepared to contribute on their first day.

What does preboarding typically look like? Many organizations use preboarding to take care of compliance tasks or other things that can be completed remotely. Common preboarding processes include giving new employees a welcome packet, providing access to a new hire onboarding portal and connecting new hires to their teams (and each other). Often, there will be a meeting or phone call between new hires and their direct supervisor (Figure 7).

Why preboard? The most common reasons are to reduce time needed for paperwork completion or increase time

Figure 7: Common components of the preboarding process

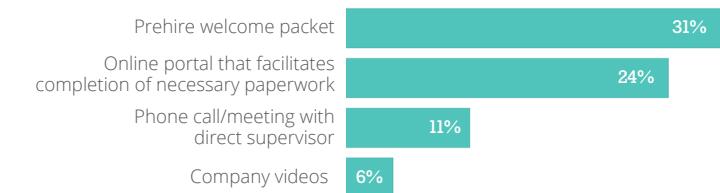
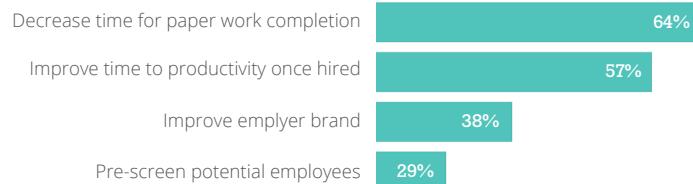




Figure 8: What are the goals of the preboarding process at your organization?



to productivity once hired. However, nearly 40 percent of organizations are keeping their reputation in mind with the preboarding process, hoping that successful preboarding will reflect well on their employer brand (Figure 8). First impressions matter, and employees can be their employers' biggest cheerleaders. If employees have a favorable first impression of their workplace, they'll be more likely to recommend the company to a friend, increasing their organizational talent pool. The trend seems to be working — 54 percent of organizations say their preboarding efforts are successful.

The offboarding process

With the average employee tenure shrinking, it's inevitable that some employees will leave their organizations sooner or later. The current average tenure is only eight years, according to SHRM research.⁶ With that in mind, many companies have implemented offboarding processes (Figure 10). Such programs are important for employers to maintain a good relationship with their ex-employees (who may return to new roles within the company in the future).

What comprises offboarding? The ubiquitous tool is the exit interview — used at more than 9 out of 10 organizations that have an offboarding program. Other common tools include transferring knowledge to employees' successors, completing an exit survey or providing the employee with a single point of contact within the organization for offboarding questions (Figure 9).

Why offboard employees? Like preboarding, these days companies are hyperconscious of their brand reputation

Figure 9: Common offboarding practices

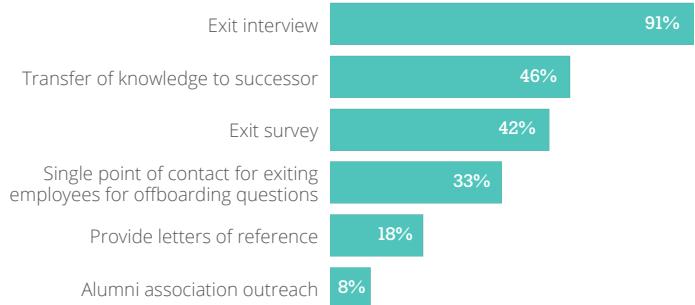
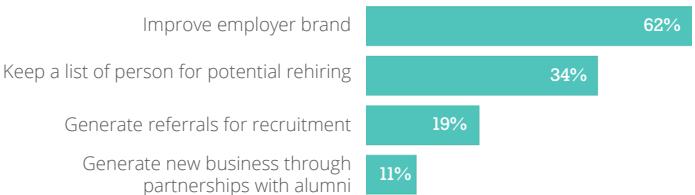


Figure 10: What are the goals of the preboarding process at your organization?



and want to protect it (Figure 10). As first impressions make a lasting impact, so do final impressions, and organizations want their employees to leave on good terms.

There has also been a resurgence of boomerang employees in recent years. If employees leave with a positive impression of their former organization, they'll be more likely to return (or want to return) to the organization as needed. Considering former employees as alumni rather than ex-workers has business implications as well. If employees remain on good terms with their former organization they can potentially bring new business to their former company.

⁶SHRM (2016). 2016 Human Capital Report.

Conclusion

For organizations to have maximum success with retaining employees, they'll need to embrace the new onboarding reality. Onboarding seals the deal of talent acquisition and improves retention of key facts around the organization, culture and how to be successful. Employees need more time to grow and develop into any new roles, and transition periods can be especially hard on workers. The most successful onboarding these days is an end-to-end solution, going beyond new hires and encompassing the total employee lifecycle. A total onboarding solution means employees are preboarded between job offer and first day, onboarded during their initial months with the organization, onboarded again whenever they step into a management role and offboarded if they decide to leave the company.

As needed, organizations should onboard all employees to their mission and values, culture and processes at scale, whenever there is a career change or a new merger or acquisition. Such onboarding is the most consistent way to introduce large groups of new employees to the organization's mission, values and work culture. By introducing new employees to the company culture from the moment of the merger, employers will better set up their workforce for success, develop their new leaders and retain high performers, which are common organizational priorities.

Appendix: Demographics

Name of survey

2018 CLO Advanced Onboarding Survey

Survey dates

February 2018

Number of respondents

986

Organization size

Less than 100 employees: 19%

100 to 249 employees: 8%

250 to 999 employees: 19%

1,000 to 1,999 employees: 11%

2,000 to 4,999 employees: 14%

5,000 to 9,999: 8%

10,000 or more employees: 21%

Geographic distribution

Mostly located in one country in one location: 29%

Mostly located in one country with multiple locations: 40%

Mostly located in one country with some global distribution: 12%

Highly distributed with multiple locations across the globe: 19%

Numbers may not total 100% due to rounding

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