



Onboarding for results

Best practice guide

 **kineo**
A City & Guilds Group Business

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1

Introduction

We all want to attract, retain and develop the best talent for our businesses. The onboarding process plays a vital role in this. And yet so often it fails to make the impact necessary.

This guide takes a broader look at the subject of new hire onboarding to examine the business case for getting it right and the potential disconnect between employer and new joiner needs. We offer a helpful framework for creating better onboarding, with practical examples and advice to help you put together your programmes.

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Why Onboard?

Are we missing a trick? Nearly one in three newly hired employees leave voluntarily or involuntarily before the end of their first year.¹

What's more, 22% of staff turnover occurs within the first six weeks of their start date. So something about the first impression we're making is going wrong. And it's not a cheap mistake to make.

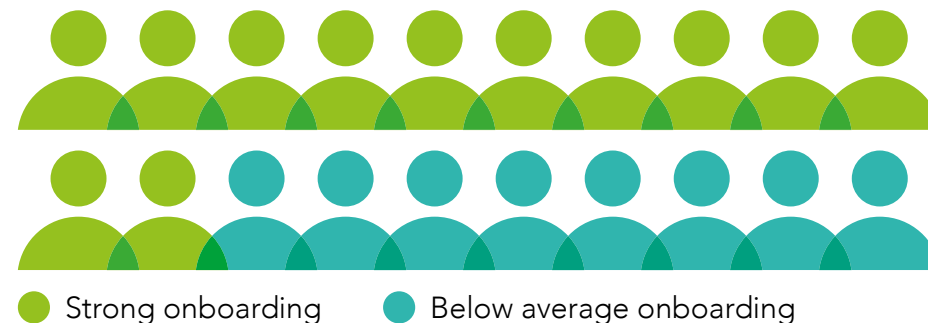
Counting the cost can be eye watering. Losing an employee in their first year can cost your business up to three times their salary².

Aside from the hard costs associated with it, high staff turnover can also impact staff morale and team culture. It's also the case that many recruit not only to fill a gap and

**FAILURE TO RETAIN
TALENT COSTS UK FIRMS
£42 BILLION A YEAR.**

PwC

to ensure business needs can be met, but also to bring in new blood and fresh ideas into an organisation. So whatever way you calculate it, losing people is costly. It's absolutely in all our interests to ensure we nurture and retain employees, particularly in that all-important FIRST year.



¹ Wynhurst Group ² Wynhurst Group and also PwC

What's onboarding got to do with it?

What can we do to help people stay? Onboarding makes a big difference. Aberdeen Consulting says that those who do onboarding well retain 91% of employees and meet performance targets quicker than those who don't. It might not be the panacea for high turnover, but this statistic makes a very strong case for bringing people onboard effectively.

Take time to get it right

Whether you call it induction, new hire orientation or onboarding – it takes time and care to create a really effective experience that helps people stick around and perform well. Yet less than half invest in formal onboarding programs, with half of those lasting less than one month. Some last for just one week, or in some cases, a single day. With so many employees deciding to leave within their first six weeks, there's a clear correlation. It stands to reason: if you're not being welcomed, taken care of, motivated and supported in your earliest stages, then

ONLY 37% OF COMPANIES INVEST IN FORMAL ONBOARDING PROGRAMMES.

the risk of you leaving increases. Arguably getting the new hire learning experience right is the most important thing we do.

We say that onboarding is a must-do for any enterprise. And we say it's not a onehit experience. As a minimum, it needs to support people in those important first 100 days, and then, of course link directly into ongoing effective people development. But length is obviously not the only factor. The quality of onboarding makes or breaks its ability to impact staff retention and performance.



Being clear on the needs you're meeting

What makes good onboarding? It depends who you ask. It might be helpful to contrast two points of view: what the employer wants and what the new joiner needs. They are not necessarily the same thing.

What does the employer want?

For the employer, the business case for creating onboarding experiences is a strong one – they need to recruit and retain (good) staff. But on a practical level, they also need to get new employees up to speed and fast. The employer primarily wants:

1 Minimum time to competence: Employers need to get new recruits up to the required competency levels as soon as possible. After all, they've hired someone to carry out a role and they need them to fulfil it. This may include competently using

systems and tools, applying processes and procedures, effectively working as part of their team, as well as applying the relevant skills and knowledge to carry out their role. But it might also be about getting new staff to a place where they can function without day-to-day support – after all, intensive training, coaching and buddying are costly, right?

2 Minimum time to compliance: Employers also need to ensure new staff are compliant, from a regulatory or legal perspective. They need to make sure employees do no harm, do not mis-sell a product or cause an accident, and so on. They also want to make sure new recruits are working clearly within company policies and guidelines. HR policies and information

on matters such as holiday entitlement, expenses, paternity leave, performance and/or probation review procedures etc. are important – you need employees to know how to function within the business on a practical level, and they have the right to know where they stand. This also needs to be efficient – not tie up lots of help desk or billable time answering questions on 'the basics'.

Of course, organisations also want people to feel welcome, motivated and excited that they're developing – but those things are often seen as second level

needs, compared with the primary needs above. We could imagine then, that seen from the employer's perspective, (and with more than a slight nod to Abraham Maslow), the employer's hierarchy of needs for onboarding looks something like the diagram below.

It's no wonder that many onboarding programmes tend to be quite information heavy – there's a lot to 'tell' and give to a new starter to get them through those all-important compliance and competency gateways.

Copy here:

How was your first day in the new job?

The place is great. I'm really compliant, and I'm well on my way to memorising lots of processes and procedures, which I look forward to implementing as soon as I have a context in which to do so.

Surely a more likely desired response would be:

People are really friendly. I've been buddied up with someone in the same role.

Sounds like there's some great training lined up. Exciting!

I can ask questions freely, without feeling foolish.

I can see what they expect; I'm getting a sense of what 'good' looks like here.

How was your first day in the new job?

It's great. I really like the feel of it.

What does the new hire want?

The new hire to the organisation wants to be compliant, sure. Nobody wants to get into trouble on their first day or be non-conformist. They also want to be competent and perform well; we all want to be thought well of. But if this was Maslow's hierarchy of new hire needs, would these be the most primary? We think not.

The needs and success factors for an individual are likely to be quite different to the practical needs of an organisation.

By the end of someone's first week in a new job, it's likely these will be the important factors:

- I understand what's expected of me in my role
- I've met all my team/immediate colleagues and can tell you a little about them
- I know where to go for help with questions and how to find practical guides etc.

But also:

- I feel a connection (with it/someone)
- It feels like I've made the right choice
- I have a sense of the culture, and I like it

And maybe a little later down the line...

- I feel like I belong
- I feel like I'm valued (and ultimately) I am satisfied with my job and feel fulfilled
- I don't think about leaving

“IN MANY FIRMS, EMPLOYEE ORIENTATION FOCUSES SOLELY ON CORPORATE CULTURE AND IDENTITY OF THE NEW WORKPLACE. THERE'S A LECTURE ABOUT THE FIRM'S HISTORY AND ANOTHER ABOUT STANDARD OPERATING PROCEDURES. THERE'S A PACKET OF INFORMATION FROM HUMAN RESOURCES, EMBLAZONED WITH THE FIRM'S LOGO...

THE UNDERLYING MESSAGE: WELCOME. YOU SHOULD BE PROUD TO WORK HERE. PLEASE FIT IN ACCORDINGLY.”





Potential conflict?

Here we have a potential dichotomy:

organisations need to give a lot of information, get people up to speed fast and ensure compliance and competency. The most efficient approach may appear to tell everyone everything so nothing's missed out. Send out documentation, point people to resources with no context, watch this long video on our values. The road to the sheep dip is paved with good intentions.

Whereas new starters crave the F word:

feelings of belonging, of potential, of being valued. People are an obvious ingredient in this. Studies (and natural instinct!) tell us that people-managers and peers are key to successful onboarding. A major reason why newly hired employees struggle and ultimately leave is a failure to establish connections and build strong interpersonal relationships within the company. But it's also about being valued for who you are and what you bring to a job.

Where does this leave us?

Well, on the surface there looks to be a mismatch between organisational and new joiner needs. The employer wants a highly efficient up-skilling and information delivery system that gets the new hire to productivity and compliance faster.

The new joiner wants empathy with their need to feel belonging, reassurance, and support, during what can be a challenging time (if you need a reminder, think back to your first day on your first job).

But really, we all want the same thing: an onboarding experience that's highly efficient and empathetic.

Can you have both? Of course. It doesn't have to be a zero-sum game. Nor does it have to be one or the other.

“ORIENTATION PROGRAMMES ARE MUCH MORE SUCCESSFUL WHEN THEY ARE LESS ABOUT THE COMPANY AND MORE ABOUT THE EMPLOYEE.”

Forbes: First minutes of new employee orientation are critical



A Framework for better onboarding

When you're constructing an onboarding experience (or any learning/performance experience), you need to consider what potential strategies you have to hand to meet your goal. But what should influence your choice?

Cost is obviously a factor. Time another. And of course, there are business outcomes and performance objectives. But there are many ways to approach putting together a fit-for-purpose programme.?

Use an efficiency and empathy matrix

One useful model (originated by Charles Leadbeater in a different context) is to map out a solution based on two metrics: Empathy and Efficiency. (Leadbeater uses a level of 'System', as in technological sophistication, rather than efficiency on his matrix, so we've tweaked the model for our purposes.) **Empathy** is subjective of course – read it as a proxy for overall emotion, feeling, mood and tone of your approach. The level of care and personalisation is reflected in the empathy level. Experiences that create a sense of fulfilment, motivation, collaboration and support will all feature in the empathy list. Personal, one-to-one attention from a manager will rank at the top for most people in an onboarding experience.

Efficiency is about the effort involved in creation, delivery and participation in the experience. It assumes you're creating the experience at scale, and assumes that your people's time is at a premium. Highly personal one-on-one daily coaching is not efficient if you're providing it for every new hire in a global business, though it's very empathetic. Efficiency also considers how systematised and structured the

experience is – how much effort is needed to participate and get value? A book on company values is efficient for you to deliver. But if I read it and it has no context for me right now, then it's not efficient – or empathetic.

The aim (as with any 2 x 2 matrix) is to push into the top right quadrant – a highly empathetic, efficient experience. High-end elearning, mobile apps or intranets could feature here, but to make them high empathy you need to ask to what degree they can be personalised and made meaningful to the new recruit. Where can you interject true stories and peer-to-peer knowledge sharing?

But you will undoubtedly want and need some one-to-one time with new joiners, such as mentoring or job-shadowing, fully recognising it's worth the investment of time even if it's seemingly less efficient. You'll also likely need to factor in some self-directed activity to cover basics, even if they're not completely personalised. The point is – you need to make these decisions consciously, weighing up value (F factor and time to performance goals) against investment, to create a blend and journey that works.

High Efficiency

Low Empathy

High Empathy

Low Efficiency

A useful menu of options

Here we've provided some potential strategies that you can consider for your programme design, plotted on the matrix.



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Structuring onboarding experiences – in practice

Every onboarding programme will be different in content and structure. It needs to be; otherwise it's missing a big trick (the empathy factor).

When plotting out a journey for your new starters, you need to consider what their needs are on day 1, week 1, and so on; what experience you want to give them and how you want them to feel; and what you need them to do, when, so you can prioritise effectively and avoid information overload.

Why start before they start

Why wait to engage, warm-up and excite your new hire? There's a huge opportunity to reach out to them before that often daunting first day to make that all important connection, check if they have any burning questions or concerns, and set expectations for what's to come. Go further and start onboarding pre-hire to ensure you attract people who are most likely to fit in and stick around. Share your company values, vision and personal stories to paint a real picture of what it's like.

There's a real chance to create a sense of excitement and brand identity with these first interventions so put your best foot forward. But make sure there's empathy and personal connection too. Include day-in-the-life stories about their job role, a heads-up about their orientation programme, so they know what's coming, and that personal touch of a phone call from an HR rep, buddy or manager just before someone starts.

A Sample Onboarding Journey

Taking some of the interventions laid out on the empathy/efficiency scale, here's what a balanced onboarding journey might look like. We've designed this for a knowledge worker joining a global financial services firm.



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10 must dos for designing onboarding experiences

So that's an example of a direction for a specific onboarding experience. Regardless of the details, there are best practices for an onboarding experience design:

Begin with empathy

When it comes to induction, there's a real need for higher empathy learning design.

Ask yourself – am I on the same page as my target audience? Have you considered what is needed, when on their journey? What might their impressions and feelings be upon joining? Do you remember what it's like on the first day? If not, it's time to ask some recent recruits for their input and even reach out to your new hires to find out what burning questions they have about the role they are soon to start.

Create an experience, not a training course

No onboarding should be a one off event. And it's not just training; it's a lot more than that.

To maintain engagement and truly support new joiners in those important first 100 days create an experience that encourages a journey of growth - in relationships, behaviours, performance and understanding. Plot meaningful goals for 30/60/100 days and support people to get there with a blend of events, tasks, stories and resources.

Start before the start date

The best moment to connect with new joiners and tap into their emotions is before day 1. Begin new hires' onboarding journey before they start, to encourage excitement, engagement, connectivity and feeling valued. You can even start onboarding pre-hire to attract people who truly get your organisation and are more likely to stay.



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www.kineo.com/learninginsights2015

Make it outcome focused; efficient, but paced

Let's face it; there is a lot to get through. Make sure you design your journey around key outcomes you want the new joiner to achieve – whether on the job, in practice tasks, carrying out observations and tasks or connecting learning to coaching conversations.

Don't just leave them to digest everything on their own. Managers and coaches are vital support here.

Put people at the heart

If we haven't said it enough already, we'll say it again. People, connectivity, and feeling like you belong are vital to staff retention. Buddies, coaches, mentors and peers all have a part to play, not forgetting their stories and experiences that can be shared. Embrace and support social learning – formally and informally – by using or setting-up platforms that enable people to connect and help one another. Ideally, give new starters access to forums where more experienced people hang-out.

Make a difference with managers

Managers and leaders have a vital role to play in effective onboarding as rolemodels, supporters, guides, coaches and creators or exemplars of (local) culture. In our Insights Report 2013 we identified managers as the glue for effective support of new joiners.

Have you ensured they recognise what's needed of them and have they been given the right support to get there? Do they understand their role in onboarding and are they motivated and rewarded for it?

Gather feedback

Hired someone for their ideas, creativity, experience, or skills? Give them a chance and space to share them with you. Fresh perspectives can quickly get swallowed up once people become 'assimilated'. Make sure you also involve new starters in their own onboarding experience and, in the art of great high empathy approaches, personalise it where you can and focus on their needs, questions, and

individual experiences. A good practice is to get an output from new joiners as part of onboarding. Get them to propose a change to the onboarding experience – it's the most useful feedback you'll get. Use social channels to have a continued conversation with new hires as they mature and develop in the business.

Build habits

Include activities that develop desired behaviours and habits e.g. the channels you'd encourage employees to use for communication, idea sharing, and collaboration. Thread experiences that encourage desired behaviours throughout the onboarding journey, in subtle or more overt ways, so they are never out of context and so they become part and parcel of what new starters do in their new role.

Be patient. Habits form over time, not in the first few days of an induction programme. But do instil them – they will bring about productivity gains more than week 1 information delivery, (which won't be retained after week 2).

Think big

Play the long game. Ensure new hires get the big picture by going outside your team/department and enable them to connect with people in other roles in other parts of the operation. Consider job shadowing to build their empathy and understanding of other roles, particularly where they connect with their own role or part of the process in some way. This is planting seeds for future talent development, and may open up opportunities for the new hire.

Give it personality

Don't underestimate the power of brand, particularly when it comes to the F word.

Encourage a sense of belonging by creating a strong brand identity and story that runs throughout the programme and its resources. You can create a sense that the new joiner is part of something exciting – if it's done with the right tone.



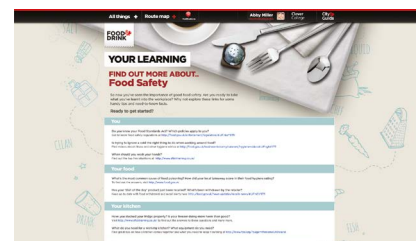
Consider a central portal to bring it all together

A way to gel the overall onboarding experience and ensure there's efficient delivery and two way conversation is to create an onboarding portal to wrap around it and foster a community.

An induction portal, combining access to resources, people and tools, can provide several benefits:

- Personalised experience for the individual enabling 'self-help' and 'just-in-time' learning
- Highly-branded experience to tell a united story and feeling
- Access anywhere, and before day 1
- Efficient delivery of content of any type, from virtual classrooms and elearning to downloads and assignments
- Efficient tracking of completion and activity for compliance
- Fosters peer-to-peer knowledge sharing and coaching conversations through discussion forums, messaging, collaboration and social tools
- Structured pathways to performance – can be aligned to specific roles and competencies
- Scalable globally
- Helps create measurable milestones, reviewed and supported by managers, coaches and mentors
- Can link to formal qualifications and badges
- Can be low cost if using an open source option like Totara LMS or Moodle

FIND OUT MORE ABOUT TOTARALMS AT KINEO.COM/TOTARA



WHETHER YOU EXTEND AN EXISTING LMS, INTRANET OR CREATE SOMETHING NEW, AND WHEN DESIGNED AND IMPLEMENTED WELL, PROVIDING AN ONBOARDING PORTAL IS ONE OF THE MOST EFFICIENT AND EMPATHETIC ACTIONS YOU CAN TAKE.

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Onboarding in action

Here are just a few examples of where we've worked to apply best practices in onboarding in partnership with leading businesses. Find out more about these at kineo.com/case-studies.



EasyJet Academy

- 70/20/10 model – flexible learning resources
- Support individuals owning their own development – set the right tone from the start
- Structured learning journeys



Barclays Onboarding

- Build enthusiasm and empathy through immersive design
- Focus on excitement and motivation
- Multi-platform



TUI onboarding

- Immersive experience to build brand empathy and product knowledge on scale
- Flexible and modular – efficient design approach
- Multi-device – accessible everywhere



City & Guilds Food and Drink sector onboarding

- Efficiently curated content from multiple sources
- Structured pathways to competence
- Empathy through tutor and assessor online and face-to-face experience
- Aligned to qualifications

References

- 'Best practices for retaining new employees: New approaches to effective onboarding', PwC
- 'Onboarding 2013 A New Look at New hires', Aberdeen Group, April 2013
- <http://www.forbes.com/sites/hbsworkingknowledge/2013/04/01/first-minutes-of-new-employee-orientation-are-critical>, Forbes, 2013
- 'SHRM Presentation', The Wynhurst Group, April 2007



Take it further

Hopefully we've helped to provoke some fresh thinking about how you can get greater efficiency and empathy through your onboarding experience.

If you need help with:

- Getting under the skin of your audience so you can start with empathy
- Developing an effective strategy and structure that balances empathy with efficiency
- Embracing social learning and technologies
- A portal solution to provide access and reach
- Design and development of immersive and effective learning and communication resources.

Whether it's retooling your existing onboarding, or starting from the beginning, we're here to help. We can provide the whole onboarding solution – whether it's tactical support or a fully managed programme:

- Consultancy
- Programme design
- Content
- Platform
- Delivery
- Assessment
- Programme management
- Ongoing support

We can help you. We work with the world's leading organisations to transform learning and performance, and onboarding is one of our specialties.

Discover how we're shaping the future of learning

Everything we do at Kineo stems from a simple idea – if we design a better learning experience, together we'll get better results.

Kineo helps the world's leading businesses improve performance through learning and technology. We're proud of our reputation for being flexible and innovative, and of our award-winning work with clients across the world.

Whatever your business challenge, we will partner with you every step of the way to find the learning solution that fits best – and delivers results. So, how can we help you?

**WE'RE
SHAPING
THE FUTURE
OF LEARNING**



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