

Strategic Onboarding – ensuring new hire success from day one

Supporting employee and agent development from day one

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American Family Insurance

Karla Walker, Talent Management

The situation

The Sales Area has requested an onboarding program to provide a consistent and structured framework for managers hiring new employees or agents that will assist in preparing them for success in their new job/role. Currently at American Family, onboarding appears to be happening in multiple places and ways, but without any real foundation from which to grow. Strategic Staffing has onboarding incorporated as part of the selection process; however, it ends at the point of hire and the individual has arrived. What happens to the new hire now?

Our Education Division incorporates it as part with their “standardized organizational learning design” which identifies courses and training to introduce the American Family experience to the specific needs of the division and discipline role. There is still a missing link, a key requirement to making any onboarding program successful.

What seems to be missing is the cartilage that connects the informational components to the relational components which is owned by the hiring manager, for it is the hiring manager who is the key in leading the onboarding experience for the employee or agent until she/he becomes competent in the job. This key element today is done in a very random fashion, some doing it very well and others barely doing anything.

What is the implication for the Sales Area?

Our sales environment is a very fast paced, customer-focused group that expects its agency sales force to achieve the sales goals set for it by our leadership. The sooner each employee and agent becomes competent in their role or job, the sooner he/she will be able to produce the results that allow the agency sales force to achieve the sales goals. For the new hire or for those transitioning to a new role, onboarding is key to their success.

What is Strategic Onboarding?

According to Bersin & Associates, “99 percent of today’s companies claim to have a formalized process or plan to invest in one in the next 12 months” (October 2009). Effective onboarding drives new employee & agent productivity, accelerates delivery of results, and significantly improves talent retention. Most sources view **onboarding** as a strategic process that encompasses all the actions performed that support the acquisition and integration of new hires into the company’s workplace environment. It begins pre-offer with ensuring that there is alignment of the position with the strategic needs of the organization and ends when the employee or agent becomes competent in the job. Onboarding can last as little as one day and as long as three years depending upon the complexity of the position.

One of the key challenges is the failure to establish responsibility for these initiatives. Many best practice organizations (54%) hire an onboarding manager to maintain the process and others establish a CoE that can manage and integrate the process with other areas of talent management. (Bersin 2009) Currently this is not an option that would fit in American Family’s current structure; therefore, we must identify alternatives to adding a manager. In addition, there are CoEs that feel very strongly they have limited responsibility for onboarding (staffing and education); however, they stop short of a program that encompasses a more strategic view.

According to George Bradt, Onboarding expert, a new employee’s failure to deliver usually stems from one or more of four things: (Onboarding: How to get your New Employees Up to Speed in Half the Time, George B. Bradt, 2009)

1. A role failure due to unclear or misaligned expectations and resources (preparation miss).
2. A personal failure due to lack of strengths, motivation, or fit (recruiting/selecting miss).
3. A relationship failure due to early missteps (head start/early days miss).
4. An engagement failure due to early days’ experiences (management miss).

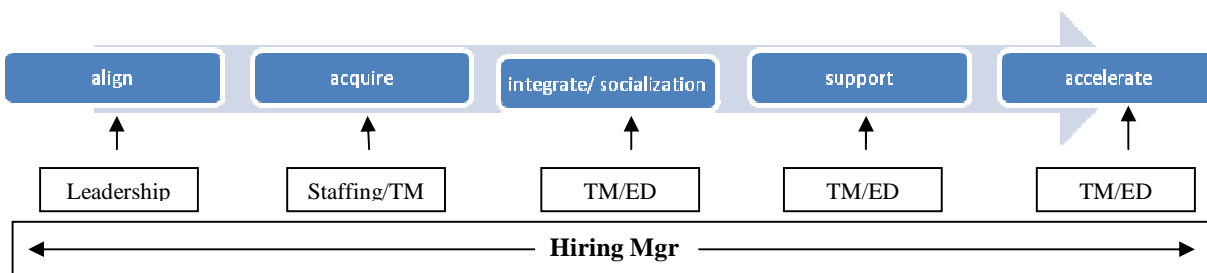
Our recent exit interviewing and engagement surveys support this finding and discussions with current employees regarding development and career planning echo these sentiments as well.

Taking the lead from Bradt, I have identified five components for our strategic onboarding process:

- 1) **Align**—ensuring the organization agrees on the need for the new hire and specific role

- 2) **Acquire**—recruiting, interviewing, and selection
- 3) **Integration/Socialization**—connecting with others who can help provide information build relationships, learn, about the company’s/division’s culture, and assimilate into the team
- 4) **Support**—giving new hires and agents tools, resources, experiences needed to do the work
- 5) **Accelerate**—helping new hires/agents and the team perform better and faster

As the diagram illustrates, strategic onboarding is a collaborative process which involves the new hire, leadership, CoEs, and the hiring manager throughout the experience. What is important to note is that the hiring manager must assume responsibility and accountability for the execution and coordination of the onboarding process for each new employee and / or agent all the way through competence.



Some of the benefits in having a strategic onboarding program are that it . . .

- Helps to increase retention
- Shows the new hire/agent that the organization cares about them and their success
- Shortens the “*time to competence*” in the role for the new hire/agent
- Helps the direct manager prepare for the arrival, integration, and training
- Let’s employee or agent know what to expect
- Provides a standard framework for hiring managers to work from when planning and preparing for new hire
- Aids in the integration/socialization of the new hire (“Many newcomers cite the lack of sufficient introductions to co-workers and other resources as a primary reason why they didn’t get up to speed as fast as they had hoped.” MITSloan Management Review, Winter 2005, p39)

Another consideration for onboarding is how long it may take a new hire to become competent in the role. The chart below identifies time to competence in specific sales area roles based on discussions with those currently in the position. If we are able to shorten the “time to competence” then the individual will be a stronger contributor and more engaged.

Position	Time to Competence
Sales Director (DX)	18 months
Agency Sales Manager (ASM)	2-3 years
Agency Sales Associate (ASA)	2 years (estimated-no one currently in role)
Agent	2-3 years
Sales Director Assistant (DXA)	1 year (with experience) 18 months (without experience)
Agency Sales Manager Assistant (ASMA)	18 months (with experience) 2 years (without experience)

External Impacts to Consider

Changing workforce demographics impact onboarding making it more and more important for organizations to manage and understand what’s changed. Of those hired today, 88 percent are Generation-Ys, 81 percent are Generation-Xs, and 69 percent are Baby Boomers. The impact of these groups in our workforce make it necessary to consider their needs when onboarding. Because the sales area has a mixture of these groups as agents, district managers, sales directors, assistants, and others it is important that all managers understand the different needs of these group in order to provide the appropriate onboarding experience.

- Baby Boomers are not retiring—they are tech savvy, involved, and need to work. They are more concerned with following protocol than with networking opportunities (61 million boomers in senior roles hope to retire)
- Generation X-expects recognition and feedback throughout the new hire experience (43 million gen x hope to “take over”)
- Generation Y-(Millennials)-expect team-building, corporate social responsibility and interactivity during the onboarding process. They are technology savvy, are looking for interactivity media tools and access to social networking sites, and an open transparent work environment. (51 million college grads and millennials)

What characterizes these generational groups and what is the impact on onboarding?

Figure 3: Work-Related Expectations and Priorities of Each Generation

Baby Boomers	Generation-X	Generation-Y
<ul style="list-style-type: none"> • Focus on the Process Over Socialization • Clearly Defined Onboarding Roadmap • Frequent Feedback Mechanisms • Traditional Recruitment and Retention Mechanisms (Benefits, Retirement Plan) • Forms Management • Level of Respect • Extend Onboarding Beyond 6 Months 	<ul style="list-style-type: none"> • Mentor Program • 30-60-90 Day Performance Reviews • Forms Management and Tasks Management • Planned Lunches On Day One • Pre-Employment Gift • Work / Life Balance • Recognition • Objectives and Timelines in the Onboarding Process 	<ul style="list-style-type: none"> • Internal Social Networking • Enable Contribution • Assignment on the First Day • Interactive Media Tools • Socialization in the Company Culture • “New Hire Clubs” • “Buddy System” • Link Onboarding to Learning • Team Environment • Employee Engagement • Flexibility in the Workplace • Innovation • “You’re Special” • Lifelong Learning • Networking • Openness and Transparency • Green Workplace • Expects 5 to 7 Major Career Changes

Source: Bersin & Associates, 2009.

The New Hire Success Plan – a strategic onboarding process

This was presented to Sales Leadership for review and then I met with each Sales Director and discussed each document – its purpose, how to use it, what to do with it, how to have the conversation with the new hire, and how to use the established plan. Using the tools/resources provided, hiring managers were asked to think through each phase and complete the documents with the new hire in mind. Once that had been completed, they were to use the information on from the documents to create the “success plan”.

Here are examples of the type of information they were asked to consider as they worked through the planning documents.

Document 1--Align—ensuring organization agrees on the need for the new team member or new hire and specific role, review of strategic plan, workforce planning, capacity planning, succession planning

- Is there alignment to American Family’s Strategic Plan? How would you explain the alignment?

Type here

- Is there alignment with the goals and priorities of the Sales Area? How does this new role/position impact the goals and priorities?

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Document 2--Acquire—identifying, recruiting, interviewing, selection and getting people to join the team.

Go to People Place MSS>Onboarding and follow the links that will get you started and provide information you need for recruiting, interviewing, and to prepare for the new hire. There you will find the following information and access to customizing your onboarding checklists. SCREEN SHOT HERE

Document 3--Integration/Socialization—connect with others who can help provide information, build relationships, learn about culture, assimilate into the team group

Position/ Role	Who do they need to know? (Type name)	Title / Role	What do they need to know or what information can this person provide them?	When does she/he need to connect with this person?	How does she/he need to connect with this person?
Agency Sales Associate		DXA	Understanding of role, what information/help she/he can provide; what he/she needs from ASA	Within 30 to 60 days	Face to Face

		DM/ASM	Build relationship/partnerships with DM; Functional understanding of role, district needs and issues	Within first 6 months to 1 year	Face to Face, schedule 2 to 5 days with ea
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Document 4--Support—give new hires and new hires tools, resources, experiences needed to the work

Name	Role	What are his/her strengths?	What are her/his development needs?
	ASA		

Identify specific tools, resources, experiences he/she needs to become competent in the role.

Specific support needed	√	What is the development focus or outcome needed?	What timeframe?
Experience needed			
Spend time with top performing DMs		Learn the district, its DM, and its new hires. Learn needs of district, agency. Identify issues; solutions	1 st year – 4 to 6 times

Document 5--Accelerate—help new hire / new hire and the team perform better and faster

- Identify stretch assignment that will help them be more confident of the SBU process
- Identify experience that will challenge their knowledge of the initiatives and the state
- Stretch assignment

Document 6--New Hire Success Plan (personalized plan for each new hire)

Time	Activity/Experience	Responsibility	Status
30 days before	Meet with staff (DMs & DXA) and discuss their involvement with integrating, socializing, and supporting the new hire.	DX & Staf	
Two weeks before	Provide the new hire with pre-work -- information about the work that will give them an opportunity to be knowledgeable enough to discuss the work when you meet. (State Fact Sheet)	DX & DXA	
First Day	<ul style="list-style-type: none"> a. Review and create the personal onboarding plan with your new hire --working together to create the plan aids in emotional engagement and encouragement. Clearly explain excepted development needed and outcomes. b. Listen, allow him/her to present his/her thinking unencumbered by your expectations or preconceived notions. After listening, work though and revise the plan together. c. Working together completes the personal onboarding plan and models the cooperative relationship you hope to have when you do more real work together in the future. 	DX & ASA	
First Day	Complete New Hire Orientation Online	ASA	
First Day	First Day Status Check-in	DX & ASA	
Month 2	Arrange meeting with Business Performance Consultant to understand role	ASA	
Within 6 months	6 month performance feedback	DX & all Staff	
Within 9 months	Get feedback from DMs – How am I doing?	ASA	
	Attend—Building Teamwork with Dispersed Teams	ASA	