

Formal On-boarding Procedures:
An Implementation Model for XYX Company

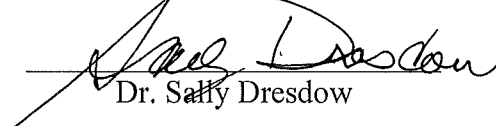
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ABSTRACT

This study examines the significance of encompassing formal on-boarding procedures and designing an implementation model for XYZ Company to follow. XYZ Company currently lacks formal on-boarding procedures and does have a concern with assimilating new employees with the company, such as expectations, culture, policies and procedures.

XYZ Company's on-boarding procedures were evaluated against on-boarding benchmarks. Where XYZ Company on-boarding procedures lacked, an implementation model was created to employ, including recommendations for implementation.

It has been revealed by investing time on-boarding a new employee; retention increases, time to become productive increases and employee morale increases.

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Chapter I: Introduction

Remember back to the first day at new job. It was most likely filled with a wide range of emotions; everything from excitement to fear and many more in between. This emotional rollercoaster can occur for just a few days or last for months. Each new day will lead to new questions of what to do, how to do it, where to go and who to ask.

The excitement people feel was conceivably from the thought this was the position in which a person could make a difference. Having just come from a company where people were not appreciated for what was brought to the table now there is the opportunity to share all the knowledge and skills with this new company.

The fear comes from the unknown. The unknown is from many different sources; how will I remember everyone's name, where is my desk, what are the performance expectations, what time should I take lunch and what is the culture of this new company. The list could go on forever. There are many unknowns when starting at a new company.

All these unknown questions should be answered during the new employee's on-boarding experience. On-boarding is the process of learning, networking, resource allocation, goal-setting and strategizing. The goal is for new hires to quickly reach maximum productivity. The process of on-boarding a new employee is different for each company. The duration of on-boarding can be from one day to one year. It depends on how difficult the information to be communicated is and to what extent the company finds on-boarding an integral part of an employee's socialization.

XYX is an Information Technology training company located in Northeast Wisconsin. It serves businesses within 150 mile radius with computer training. The training conducted

includes application training, such as Word, Excel, etc., to technical training, such as server and programming languages.

Currently the on-boarding process consists of the Human Resource (HR) Manager spending a few hours with new employees to go over paperwork and the employee manual. After successful completion of the paperwork new employees are handed over to another employee located in the new employee's department. The time spent with these people is designed to show new employees their daily tasks. In company XYZ new employees do not know management's expectations of them and are now in the dilemma of either sinking or swimming.

Statement of the Problem

XYZ Company does not have formal on-boarding procedures. By not having formal on-boarding procedures in place, each new employee is introduced to the company in a different way. There is no consistency to the information given or how it is dispersed.

Purpose of the Study

This study is designed to develop a new on-boarding process. As a result of having formal on-boarding procedures XYZ Company can answer the unknowns while effectively integrating the new employee into the organizational cultural and performance expectations of the company. It has been established that employees make the decision whether to stay with the company within the first six months of employment. The Corporate Executive Board (2006) states that unengaged employees are more likely to leave a company, and in fact, 59% of highly engaged employees plan to stay with their current employer while just 24% of the disengaged individuals plan to stay. Without effective assimilation into the company an employee will more than likely leave to find greener pastures. This has two negative effects on an organization; 1) employee retention decreases and, 2) recruitment costs increase.

Therefore, by implementing formal on-boarding procedures XYZ has the potential to improve retention and decrease recruiting costs, to enhance employee morale and to improve productivity. And everyone knows what comes with being more productive; increased profits.

Assumptions of the Study

It is assumed with all others items remaining constant the implementation of formal on-boarding procedures and best practices will increase employee retention, morale and productivity.

Definition of Terms

On-boarding. The process of learning, networking, resource allocating, goal-setting and strategizing that ends with new hires quickly reaching maximum productivity.

Limitations of the Study

This study is based on XYZ not having formal on-boarding procedures and best practices. It is also assumed that upper management needs to understand the importance of on-boarding and agrees to implement and consistently use the model presented.

Methodology

In this study, XYZ's on-boarding procedures and best practices will be evaluated against on-boarding benchmarks. Where XYZ lacks in its use of on-boarding procedures an implementation model will be created for future use.

Chapter II: Literature Review

The practice of on-boarding new employee is imperative to keep organizations highly productive and competitive. This literature review will clearly define what on-boarding is, why it is crucial to organizations and what to avoid when on-boarding.

Introduction to On-boarding

On-boarding is the process of learning, networking, resource allocating, goal setting and strategizing that ends with new hires quickly reaching maximum productivity (Chashman & Smye, 2007). This formal process of on-boarding is what assimilates the new employees to rules, procedures, benefits, expectations and the goals of the organization. On-boarding is more than getting the dreaded paperwork completed and reading the long and boring employee manual. It is the integration of a new employee to become a highly productive member of the organization. On-boarding engages the new employee into the world of the organization.

The function of on-boarding should not be the sole responsibility of the Human Resource Department. Instead this process can and should involve others such as; the CEO, the manager of the new employee and co-workers from the new employee's department. Wheeler (2006) explains the relationship with the manager is one of the most significant in an employee's work life and that most employee turnover is ultimately caused by that relationship (or lack of it), which makes the ability to assimilate new employees a core competency of managers. One person cannot successfully integrate a new employee into the organization. This needs to be accomplished by a team. Just as an organization's culture is not comprised of just one person's ideas, thoughts and opinions, on-boarding is a fusion of many people's experiences, views and ideas.

Advantages to On-boarding

Some of the vital reasons why an organization should to implement a formal on-boarding process are to increase retention, productivity, engagement and morale. All of which affect the bottom line.

It has been noted by the Aberdeen Group (2006) that 90% of employees make their decision to stay at a company within the first six months. Making a positive impression is critical when new employees come aboard. If the new employee does not feel engaged with the organization it is highly possible this disengaged employee will detach themselves from the company and look for employment elsewhere. Engaging each new employee strengthens either their motivation to stay and grow with the organization or their determination to exit and find a better fit.

Keeping an employee engaged may take a bit of energy and cost on the front end, but the cost of replacing that employee is significant. Eric Harymeyer (2008) of Rockwell Collins determined it would cost his company roughly \$75,000.00 in recruiting costs, training expenses and lost productivity to replace someone who made \$50,000.00 a year. An unnecessary expenditure of \$75,000.00 has a negative impact on the bottom line of any organization. If an average organization could engage their new employees more effectively through a formal on-boarding process, the company could save upwards of a half a million dollars given current turnover averages.

New employees start out as liabilities while they learn to use their skills and experience to make a positive contribution, the more quickly employees get up to speed, the sooner they can begin contributing to the bottom line regardless of role or department (Taleo, 2006). The

potential of a new employee's productivity increases when a formal on-boarding process is implemented.

Successful on-boarding programs quickly integrate new employees and not only helps them become familiar with corporate policies, procedures and culture, but also helps them identify their responsibilities and figure out how to fulfill them in the new environment (Moscato, 2005). Without clearly defined expectations and goals, a new employee only assumes what the organization is looking for and it may not be accurate. With the right information in hand new employees can use the skills and experience that they have previously acquired and move forward to achieve the goals that have been set and will not require micro-management. By meeting and/or exceeding the expectations and goals of the organization new employees will feel productive as if they are now a valued member of the organization. The faster the integration into the organization the less they are looked upon as a liability and the more they are perceived as a highly productive member of the organization.

With effective on-boarding new employees will quickly understand how the organization values their employees. Their initial reception and introduction to other employees will help them feel supported. On-boarding ensures that an organization is prepared for and committed to positioning new hires for success in their new role (Commongood Careers, 2008). It is imperative for organizations to make a superior first impression when new employees start because organizations do not have the ability to re-create this situation. New employees that feels engaged in the company on their first day of work will have a greater incentive to stay at that company (Aberdeen Group, 2006). Retaining new employees will increase morale with their co-workers because they no longer have to pick up the slack that was caused by an unhappy, departing employee. Research conducted by the Corporate Leadership Council in 2004 revealed

that by effectively on-boarding new employees, companies can improve employee engagement in excess of 20% (Corporate Executive Board, 2006).

Formal on-boarding processes can impact new employees in the following ways; the unknowns are answered, expectations and goals are set, they are more easily assimilated into the organization's culture and they build strong relationships faster.

What to Avoid

In return, if the new employee is negatively impacted by the on-boarding or lack of on-boarding, the organization will be greatly affected by a significant decrease in retention, productivity and morale. These decreases represent a reduction in the organization's bottom line.

Dr. John Sullivan (2008) states most on-boarding programs are poorly designed and even more poorly executed. There are a number of common errors organizations need to avoid in their on-boarding procedures. These errors occur from the beginning to end of the process, and will create disengagement of the new employee.

Not establishing relevant program objectives. Moore (2008) states that developing a successful program that fits your organization starts with program objectives. Without having clear objectives the implementers of the program will not know what needs to be covered and new employees are in the dark until they figure it out on their own. According to Sullivan (2008) most corporate on-boarding programs are designed from the HR administrator's perspective. Administering on-boarding from this perspective focuses on easing the administrative load of the HR department and ensuring compliance with legal issues.

No commitment from upper management. Upper management needs to truly understand and support the objectives of the program. It is essential that the on-boarding program be covered by a formal business case (Sullivan, 2006). Upper management can provide the funds to

make the program successful. Participation in and endorsement of the program activities from senior leadership is the main way organizations bolster program credibility (Moore, 2008). As a result of the work Stein and Laughlin (2007), they found the organizations that have the highest returns from on-boarding investments are the ones that involve a broad cross-section of functional leadership. Without senior backing, programs often fail to achieve the objectives.

Not being prepared for the new employee. Employee workstations should be stocked and computer and telephone access should be ready and waiting. In addition, access to the corporate network, email account, keys and any essential resource; such as software programs, tools, or information should be available immediately. It is essential everyone from the front desk receptionist to the CEO knows there is new person starting with the organization so they will be able to personally welcome the new employee and make them feel as if they are part of the organization.

Overloading new hires. Do not make the new employee sit through a four hour presentation of the employee manual. This much information is overwhelming and a new employee will not be able to retain all of it. As one manager Lee (2007, ¶ 9) interviewed noted, by breaking your orientation program into digestible chunks, you not only communicate, “We’re a company that does things right,” you also communicate, “We care about you and respect you enough to spare you a lousy, nonsensical training experience.”

Not providing critical information. Information that is critical includes: company goals, job expectations and information about the culture of the organization. By offloading as much information as you can so its available on an “as-needed” basis, you are being more efficient and effective. This communicates to new hires the organization knows how to do things right (Lee,

2007). Lee (2007) also suggests by having a comprehensive intranet gives new hires a greater sense of security that they can find the information they need when they need it.

Lack of soliciting feedback. The best programs directly ask new hires about their concerns, who they wish to meet, what they wish to learn and how to best motivate and manage them (Sullivan, 2006). Feedback provides an understanding from each person's perspective in a situation. It offers new employees a means of how their manager perceives their performance.

Not having the manager present. It is important for managers to realize the cost of poor on-boarding is the highest for them (Sullivan, 2006). The greatest negative impact on new employees is if managers ignore on-boarding. Without the manager present, a new employee is not given the correct direction or information regarding what is expected of them. In turn, new employees may not meet the manager's expectations and that in turn allows a gap to grow between the manager and new employees. Both the manager and new employees will become frustrated with the relationship. If the employee leaves, the manager must hire a new person and start the training over and is now further behind.

Failure to learn the unwritten rules. Do not make the new employee learn the unwritten rules the hard way by discovering them on their own, such as learning about "casual Fridays" (Platz, N.D.). Although forward thinking organizations focus on identifying "cultural fit" during the recruitment process, most companies do not make a concerted effort to orient new employees to the uniqueness that defines the company. Far too often new hires are left to "figure it out on their own" (Stein & Laughlin, 2007). Research shows that the best way to reinforce these values is through telling compelling stories that illustrate these expected actions (Sullivan, 2006).

Summary

In conclusion, a successful on-boarding process is one which results in increasing retention rates while shortening the time it takes for the new employee to become productive. D'Aurizio (2007) states the best-in-class on-boarding programs result in highly integrated, productive and satisfied employees and dramatically affects turnover rates as well as customer satisfaction.

In the past, bringing aboard new employees was more about getting their new hire paperwork completed and going through all the mandated training and less about engaging the new employee into the organization. Today, organizations are looking to have a competitive advantage which starts by attracting and then retaining high-quality employees. To attract new employees an organization needs to market themselves as a well organized, considerate of their employees and customers and highly productive. On-boarding illustrates to prospective new hires the organization cares about the new employees to take the time to provide them the training and support needed to become immersed into the culture and productivity of the organization. This demonstrates what the company values; their most valuable asset is their employees.

Chapter III: Methodology

XYZ Company does not have formal on-boarding procedures. By not having formal on-boarding procedures in place, each new employee is introduced to the company in a different way. There is no consistency with what information is given and how it is dispersed.

In this study, XYZ's on-boarding procedures and best practices will be evaluated against on-boarding benchmarks. Where XYZ lacks with on-boarding procedures an implementation model will be created for future use.

Subject Selection and Description

Organizations who have implemented formal on-boarding procedures will be used as benchmarks. These organizations are drawn from published articles about their experience while implementing or refining formal on-boarding procedures and understanding the importance of this subject.

Data Collection Procedures

In addition to reviewing case studies of organizations who have experience with formal on-boarding procedures, information drawn from the literature review added supporting information regarding best practices for on-boarding new employees

Data Analysis

The on-boarding procedures of XYZ were examined and evaluated against the benchmarks set by other organizations who have successfully implemented formal on-boarding procedures.

The study will also evaluate the 2008 turnover rate of XYZ and compare to that of the national average. By understanding the national turnover rate and compare it to where XYZ is,

will be able to make clear as to where XYZ is positioned. Where XYZ lacks in formal procedures an implementation model will be developed for future use.

Limitations

The data is limited to only organizations that have published their experience with implementing formal on-boarding procedures.

Chapter IV: Results

XYZ Company does not have formal on-boarding procedures. By not having formal on-boarding procedures in place, each new employee is introduced to the company in a different way. There is no consistency with what information is given and how it is dispersed.

As a result of having formal on-boarding procedures XYZ Company can answer the “unknowns” while effectively integrating the new employee to the organizational cultural and expectations of the company. The unknowns are from many different elements; how will the new employee remember everyone’s name, where their desk is, what the performance expectations are, what time they should take lunch and what is the culture of this new company. The list could go on forever.

It has been established that employees make the decision whether to stay at a company within the first six months of employment. Without effective assimilation into the company, an employee will be more likely to leave to find greener pastures. This causes retention to decrease and the cost of recruitment to increase.

Therefore, implementing formal on-boarding procedures XYZ could improve retention, decrease recruiting costs, improve morale and become more productive. Improving all of these elements will give the organization a competitive edge and support an increase in profits

What Successful Companies Do

It was found that in each case where a company, such as Corning Glass Works, Texas Instruments and Hunter Douglas, had implemented or improved their on-boarding procedures, retention was increased (Chaisson, 2005). Organizations that were successful with on-boarding new employees had put into practice a number of principles. These principals are listed in detail

below. Table 1 simplifies where XYZ measures up to organizations that provide successful on-boarding to new employees.

Table 1: A Comparative Look

On-boarding Practices	Successful On-boarding Organizations	XYZ Co.
1. Had clear and concise program/ objectives.	Yes	Very Little
2. Started on-boarding process as soon as the employee accepts the company's offer.	Yes	No
3. Defined metrics to measure the successfulness of the program.	Yes	No
4. Had support from senior management.	Yes	Very Little
5. Set clear expectations/goals to the new employee immediately.	Yes	No
6. Assign a mentor.	Yes	No
7. Set the leader's performance objectives to include successful on-boarding.	Yes	No
8. Use technology to improve the process.	Yes	No
9. Use formal training to present a consistent message.	Yes	Very Little
10. Be prepared for new employee.	Yes	Very Little

Had clear and concise program objectives. The program was well thought out and the company planned what information they wanted the new employee to know. The information could include the company's mission statement, product/service information, culture, the "go to" people in each department, competition and etc. Time frames were established as to when the new employee would need the information and how long each session would be.

Started on-boarding process as soon as the employee accepts the company's offer. The Aberdeen Group (2008) found the Best in Class companies were more likely to start the on-boarding process upon the acceptance of an employment offer and before the first day on the job for all categories of staff. These companies take advantage of the time between when the offer is

accepted to when the new employee actually starts. The new employee will be pleased to observe the company preparing for their arrival. The interpretation by the new employee will be that the company is caring and supportive. This interpretation confirms to the new employee that they made the right decision in accepting the job offer. Employees that feel their company does care are far more likely to be disengaged and more likely to leave. According to a 2005 Towers Perrin study (Corporate Executive Board, 2006), unengaged workers are less likely to put in high levels of effort into their jobs, making them less productive and in fact, only 24% of the disengaged individuals plan to stay.

Defined metrics to measure the successfulness of the program. Each company decided what they wanted to measure and how they would go about measuring it. Successful companies wanted to compare the turnover percentage, the time it took to become productive, employee morale and engagement within a formal on-boarding process. Also determined were the timeframes for when the surveys and feedback would be solicited. These companies also immediately responded to metrics in order to improve the program procedures. When the company would become aware of something from a survey or feedback they could improve, they would not hesitate to make that difference.

Had support from senior management. Senior management understood the benefits of a formal on-boarding process; keeping their qualified employees, decrease in turnover, higher productivity and increased profits. Senior management could provide the resources and budgets to make the program happen. The organizations that have the highest returns from the on-boarding investments are the ones that involve a broad cross-section of functional leadership (Stein and Laughlin, 2007).

Set clear expectations/goals to the new employee immediately. This information should include expectations and responsibilities of the position and how performance standard are set to measure success. It will also explain how this position contributes to the whole of the organization. The leader explains the short-terms goals during the probationary period along with and explanation of the long-term goals. Do not confuse new employees about what they need to do to become successful in their position. Setting expectations early establishes good communication between the leader and new employee.

Assign a mentor. This would be a person who has freely accepted this position and possesses a huge amount of information about the company. This would be the “go to” person for the new employee. When the new employee is not sure of where to go for an answer, resource or information this person would lend a helping hand. This mentor would also visit the new employee to see how things are going, and to get personal unsolicited feedback with which to improve the on-boarding program. Also, the mentor can help immerse the new employee into the culture of the company. It is a huge accomplishment is to understand how co-workers and departments interact with one another and how one interacts with customers and vendors.

Set the leader's performance objectives to include successful on-boarding. Randstad found when they implemented a formal on-boarding process the key to the new program's success was getting managers to own the process and results and to enable managers to develop deeper relationships with their new hires (O'Leonard, 2005). The ownership of on-boarding cannot be the total responsibility of the HR Department, there must be a partnership between HR and the leaders to provide and promote a successful on-boarding program. HR can provide the strategy and process, but the leader needs to be accountable to see that it is accomplished since they are the ones managing the new hire.

Use technology to improve the process. Software can help by coordinating and housing the stream of on-boarding related paperwork and email correspondence, which may deal with everything from contract approvals to salaries to benefits programs to training, all in one place (Moscato, 2005)

Use formal training to present a consistent message. These formal trainings could include anything from understanding the mission, vision and background of the company to safety and harassment training.

Prepare for new employee. Prepare for the new employee by having a workstation, computer, telephone, keys, ID badge, and access to all systems needed. Don't let the new employee arrive the first day without these items in place. Not having these tools and resources being in place prior to the new employee arriving places a belief in their mind the company doesn't care.

What XYZ is Doing

It was established, the turnover rate of XYZ in 2008 was 108%, which is shockingly high compared to the national average of 3.6% in the same year. The turnover rate of XYZ clearly indicates there is something desperately out of balance with this company.

Currently, on-boarding at XYZ is almost non-existent. After the new employee has accepted the offer of employment there is little if any contact with that new employee until their first day. It is also likely that the manager of the new employee is not in the office to welcome them. Usually, the Office Administrator was told the day before on her way home that a new employee would be starting. Early the next morning before the new employee arrives the Office Administrator rushes feverishly to get a workstation and supplies together.

The HR Manager is there to greet the new employee and give a tour of the facility. The tour also includes introduction to any employees in the office. After the tour and introductions are completed the HR Manager will begin to simplify the employee handbook and briefly discuss each topic. This is followed by filling out the new hire paperwork. Once the paperwork is properly filled out the new employee is shown where their workstation and is handed over to a co-worker. This person will describe what their responsibilities and expectations are and how they go about meeting these expectations. This co-worker is not familiar with what the responsibilities and expectations are of the new employee.

Mid afternoon the manager arrives in the office to say and ask how things are going. This completes the current on-boarding process at XYZ.

Chapter V: Discussion

XYZ Company does not have formal on-boarding procedures. By not having formal on-boarding procedures in place, each new employee is introduced to the company in a different way. There is no consistency with what information is given and how it is dispersed.

Therefore, implementing formal on-boarding procedures XYZ could improve retention along with decreasing recruiting costs, improving morale and becoming more productive. Becoming more productive and reducing costs can have competitive advantage over the competition while generating enormous profits.

The on-boarding benchmarks established indicate that it is critical to have formal on-boarding procedures in place and are consistently used. As a result of having formal on-boarding procedures a company's turnover will decrease, productivity will increase and employee morale and engagement will improve. Not having formal on-boarding procedures established and implemented increases the employee costs for XYZ Co. These costs include recruiting and re-training employees, lost productivity, overtime for current employees to pick up the excess work, and it requires time for managers to coach employees. The costs are exponential and can have adverse effects months after the new employee quit.

The turnover rate at XYZ for 2008 was 108%, which for a small company is alarmingly high. This meant within the year of 2008 the company managed to turnover its whole complete workforce more than once throughout the year. In comparison, the national turnover rate is 3.6%. XYZ was not functioning optimally. It seemed the company was always just trying to get established even though it was founded in 2001. The caliber of employees hired was not the issue; the people being hired had excellent education and experience.

XYZ Company needs to increase its retention rate of new employees. In addition morale needs to be improved, and new employees need to become productive faster, otherwise the company will likely experience additional problems.

An on-boarding implementation model has been created to for the company to execute and follow. This model can be found in Appendix A. The implementation of this model would start with organizing an on-boarding committee. Committee members would consist of employees from upper management, HR Department, Training Department and other general employees. Each member will bring their own unique viewpoint and contribution to the on-going improvement of the program. This committee would set up the clear and concise program objections, set how the managers' performance objectives will be tied to the successful implementation of on-boarding, make changes immediately to program when needed.

Also the committee would be responsible for announcing and communicating the program to the organization. Explaining what the on-boarding program is, how it will be incorporated into the organization, why the organization is implementing the program and how it will affect each person in the organization. The committee would need to promote the program to encourage buy in from all employees. Each employee is important to the successfulness of the program as each person can provide feedback to what they see happening. Furthermore, each employee can aid in the promoting the program while motivating others.

The next step in the implementation would be to pilot the on-boarding program. In this step, the on-boarding would be analyzed with complete scrutiny. Questions such as; was the program effective, what modifications are needed, are there any additions; need to be answered. Through this process the program can be adapted to facilitate an improved on-boarding program. The final step would be to officially launch the on-boarding program throughout the company.

Appendices B –D are surveys to be used with the new employees at the different stages indicated in the implementation model. These surveys will generate invaluable feedback from the new hires to improve the on-boarding experience. These surveys will be confidential.

The implementation model found in Appendix A is a guide to following of what action is necessary at each stage of on-boarding. This model should be used consistently for each new employee, although it could be modified for different employee classifications. An example of where the model may be modified would be for a manager. Managers may need time to connect and understand the employees they manage.

Recommendations

Having such a high turnover rate, it seems that there may be more problems than the lack of formal on-boarding procedures. There may be other issues affecting the satisfaction of the employees. It is recommended that other areas be reviewed to ascertain what else is impacting the turnover at XYZ.

The implementation of an off-boarding program at XYZ could help provide information as to why employees are leaving the company. Employees may feel free to discuss the real reasons for resigning since they are leaving and feel no repercussions could hurt them.

It is also important to review the recruiting process to be able to provide a better experience for people interviewing with XYZ. Just as the saying goes you never get a second chance to make a first impression. XYZ needs to sell its good attributes that it has to attract high-quality employees.

It is important to acknowledge internal transfers within the program. The model would need to be modified to use with an internal transfer. This person may already know a lot about

the company, but they are new to their new position and will go through the same emotional rollercoaster as a new hire.

Lastly, understanding which software package could be implemented to integrate payroll with the Human Resource department and Training department. Technology can have an enormous impact on how a company can retain and retrieve employee information and retrieve this information efficiently.

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Appendix A: Implementation Model

Pre On-boarding Stage

*These items need to be set and in place before the formal on-boarding can begin

1. Senior Management must support this program to the fullest by taking part in presenting, providing money for budget and free up time of managers to also take part.
2. Train managers and mentors to execute the on-boarding procedures
3. Include successful on-boarding as a performance objective for managers
4. Explain to all current employees about the program. What the program consists of, what results are expected, why it is important and to get buy-in. Current employees will be able to see things that happen on a daily basis.
5. This model is for each person – depending what position a person is hired for may determine if more training is applicable
6. Manager must sign off at each stage the new employee has successfully progressed
7. Committee must look at survey results and implement changes immediately
8. Ownership of on-boarding should be part of the Human Resources department and manager
9. Committee should be established to provide continual improvement to the model.
10. Create a mission statement and objectives of the on-boarding program
 - a. Example:
 - i. Objectives of On-boarding
 1. To provide new employees with: the resources they need to answer all the unknowns when starting a new position, become a productive member of the company, introduction into the company culture and become part of the XYZ company family and explain the benefits and procedures.

Offer Accepted Stage

1. Manager and co-workers should be informed that a new employee will be starting and what the position consists of.
 - a. Co-workers should send an email greeting to new employee
2. Manager should prepare job expectations and responsibilities
3. Administrative Items
 - a. Prepare cube or office with all the needed office supplies
 - b. Desktop or laptop
 - c. Email username and password
 - d. Access to applications along with username and password
 - e. Keys to office, building
 - f. Cell phone if applicable
 - g. Business cards

4. Set up a mentor
5. Send Welcome Kit:
 - h. Welcome letter from the CEO
 - i. New hire paperwork to new employee, this is to include I-9, W-4, insurance information, employee handbook, about the area information if from out of the area
 - j. Welcoming video
6. Keep up with correspondence with new employee

1st Day Stage

2. Make sure manager is at the office to welcome the new employee.
3. All co-workers should have already know, if not make sure they know so each of them can welcome them in their own special way
4. Manager should give brief overview of what to expect for the 1st day, the 1st week and the 1st month.
5. Tour the facility – give handout of layout of building and organizational chart
 - a. Building layout will include exits, fire extinguishers, bathrooms, office and cube space.
 - b. The organizational chart will include name and title
 - c. Intranet will provide this information, but in much more detail – added picture of each person and brief description of what each person does
 - d. This is to include where the new employee sits
6. Meet with CEO for welcome talk
 - a. Mission, goals, vision, values and history – also on the intranet
7. Meet with HR to complete any paperwork, policies, procedures and benefits – Go over questions/concerns.
8. Lunch with supervisor

1st Week Stage

1. Manager should provide a job description; with clear and concise responsibilities, explain expectations of the position, performance objectives and how they will be evaluated against.
2. Introduce mentor and what a mentor is for.
3. Introduction to the culture of the company
4. Complete any final new hire paperwork and complete the policy and procedures training
5. Learn position – what is the service we provide, why are we different, who is our competition and what are their strengths and weaknesses, who are currently providing our service to, who else do we want to provide our service to, what are the day to day activities, how does the position interdependent on other, how are other interdependent on this position.
6. Get to know co-workers – have a luncheon to

7. Job Shadow
8. Survey by hr department of what they felt the 1st week was like – good things, bad things, what they were expecting, what they think should be changed. This survey can be found at Appendix B

1st Month Stage

1. Complete any federally mandated training and any company training
2. Competence of policy and procedures also can be found on intranet.
3. End of the month, give verbal review
4. Continue competence in corporate culture
5. Survey, this can be found at appendix C – do they know what they are suppose to know
6. Managers and new employees need to understand each other, such as work style, motivations, communication preferences
7. Continue to gain competence of position

60 to 90 Days Stage

1. Continue to gain competence of position and start delivering results
2. Build relationship with co-workers, customers, vendors
3. Complete 90 day formal review – Appendix D – do they know what they are suppose to know
4. Managers need to understand the new employees motivations, goals, start to create a development plan,
5. Continue competence in corporate culture

6 Month Stage

1. Competence with position and delivers results continually
2. Competence with corporate culture and can demonstrates the visions, values, mission of the company
3. Continuously building relationships with co-workers, customers, and vendors
4. Survey – Appendix E

1 Year Stage

1. Annual review
2. Survey of 1st year with company, likes, dislikes, manager, processes, improvements, things done well, do they know the information they are to know, assimilated to corporate culture
3. Revisit development plan

Appendix B:

On-boarding Survey: 1st Week

Purpose:

This is an opportunity for us to better understand your first week experience with XYZ Company. We would like to hear your insight as to your experience being integrated into the company. We value your opinions and would like to continually make the on-boarding process superior.

Before 1st Day:

What word(s) best describe how you felt *before* your first day?

Eager/Excited

Indifferent

Confused/Worried

Other (please specify): _____

Did you receive Welcome Packet before you started?

YES

NO

1st Day:

Did your manager welcome you on your first day?

YES

NO

Did you get a tour of the facility?

YES

NO

Was your workspace equipped with all necessary resources?

YES

NO

Were you introduced to your co-workers?

YES

NO

Did you meet with the CEO?

YES

NO

What did you enjoy the most on your first day?

What did you enjoy the least on your first day?

1st Week:

What word(s) best describe how you felt *after* your first day?

Eager/Excited

Indifferent

Confused/Worried

Other (please specify): _____

Did you receive your Job Description?

YES

NO

Did you meet with your mentor?

YES

NO

What was the most useful part of the first week?

What was the least useful part of the first week?

What suggestions do you have to improve your first week?

Did the first week at XYZ Co meet your expectations?

YES

NO

What met your expectations?

What did not meet your expectations?

Is there something that you wish would have been covered, but was not covered?

Would you have liked to receive more information before you started?

Additional Comments:

Gender:

- Female
- Male

Status:

- Permanent Full-time
- Permanent Part time
- Temporary Full-time
- Temporary Part-time

Age:

- Less than 20
- 21-29
- 30-39
- 40-49
- 50+

Appendix C:

On-boarding Survey: 30 days

Purpose:

This is an opportunity for us to better understand your first 30 days with XYZ Company. We would like to hear your insight as to your experience being integrated into the company. We value your opinions and would like to continually make the on-boarding process superior.

Manager:

My manager has played a key role in my on-boarding experience so far?

YES

NO

My manager has had enough time for my needs and questions?

YES

NO

I received adequate and timely feedback about my work?

YES

NO

I have respect for my manager?

YES

NO

I feel my manager understands my work and communication style?

YES

NO

Comments on Manager:

Mentor:

My mentored has played a key role in my on-boarding experience so far?

YES

NO

My mentor has had enough time for my needs and questions?

YES

NO

My mentor has provided timely and appropriate information, advice and guidance?

YES

NO

Comments on Mentor:

Culture:

I understand the mission, values, goals and vision of the company?

YES

NO

I understand the policies and procedures?

YES

NO

I feel like part of the Company family?

YES

NO

Comments on the culture of the company?

Responsibilities/Expectations of Position:

I know my role in the organization and what was expected of me?

YES

NO

At what capacity of productivity do you feel you are at with the 30 day of on-boarding you have received?

0-30%

31-60%

61-90%

91-100%

Comments on the Positions:

General:

After 30 days of employment I am:

Satisfied with my decision to join the company

Indifferent

Regret my decision to join the company

Other, please specify _____

So far I would rate my on-boarding experience as:

- Excellent
- Very good
- Good
- Fair
- Poor

So far what was the most useful part of your on-boarding experience?

So far what was the least useful part of your on-boarding experience?

What suggestions do you have to improve the on-boarding experience?

Has the on-boarding met your expectations?

- YES
- NO

What met your expectations?

What did not meet your expectations?

Is there something that you wish would have been covered, but was not covered?

Additional Comments:

Gender:

- Female
- Male

Status:

- Permanent Full-time
- Permanent Part time
- Temporary Full-time
- Temporary Part-time

Age:

- Less than 20
- 21-29
- 30-39
- 40-49
- 50+

Appendix D:

On-boarding Survey: 6 months

Purpose:

This is an opportunity for us to better understand your first 6 months with XYZ Company. We would like to hear your insight as to your experience being integrated into the company. We value your opinions and would like to continually make the on-boarding process superior.

Manager:

My manager has played a key role in my on-boarding experience?

YES

NO

My manager has had enough time for my needs and questions?

YES

NO

I received adequate and timely feedback about my work?

YES

NO

I have respect for my manager?

YES

NO

I feel my manager understands my work and communication style?

YES

NO

Comments on Manager:

Mentor:

My mentor has played a key role in my on-boarding experience so far?

YES

NO

My mentor has had enough time for my needs and questions?

YES

NO

My mentor has provided timely and appropriate information, advice and guidance?

YES

NO

Comments on Mentor:

Culture:

I conduct my professional career with the mission, values, goals and vision of the company in mind?

- YES
- NO

I feel part of the Company family?

- YES
- NO

Comments on the culture of the company?

Responsibilities/Expectations of Position:

I know my role in the organization and what was expected of me?

- YES
- NO

At what capacity of productivity do you feel you are at with the 6 months of on-boarding you have received?

- 0-30%
- 31-60%
- 61-90%
- 91-100%

If not at 100% capacity, how long do you feel it will take you to become 100% productive?

- 7-8 months
- 9-10 month
- 11-12 months
- 1 year
- 1 year+

I feel a strong sense of commitment to help the organization meet its goals and objectives?

- YES
- NO

Comments on the Positions:

General:

After 6 months of employment I am:

Satisfied with my decision to join the company

Indifferent

Regret my decision to join the company

Other, please specify _____

I would rate my on-boarding experience as:

Excellent

Very good

Good

Fair

Poor

The on-boarding experience was a use of my time?

YES

NO

What has been the most useful part of your on-boarding experience?

What has been the least useful part of your on-boarding experience?

What suggestions do you have to improve the on-boarding experience?

Has the on-boarding met your expectations?

YES

NO

What met your expectations?

What did not meet your expectations?

Is there something that you wish would have been covered, but was not covered?

Additional Comments:

Gender:

- Female
- Male

Status:

- Permanent Full-time
- Permanent Part time
- Temporary Full-time
- Temporary Part-time

Age:

- Less than 20
- 21-29
- 30-39
- 40-49
- 50+