

# *Onboarding*



*How to Get Your **NEW EMPLOYEES**  
Up to Speed in Half the Time*  
GEORGE BRADT | MARY VONNEGUT

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## Praise for *Onboarding*

“A must read for anyone bringing someone new into their organization—if they are serious about setting them up for success! Well organized, easy to understand and implement.”

—Andy Kriz, Director, The Human Capital Institute

“This book shows you the MOST successful way to ensure new recruits deliver for you. It's filled with practical tips! Why would you settle for anything less?”

—Robert Rigby-Hall, SVP and Chief Human Resources Officer, LexisNexis Group

“Onboarding provides a framework and tools to rapidly embrace new employees and position them for success. A must read for high-performing organizations.”

—Tom Colligan, Dean of Executive Education, The Wharton School, University of Pennsylvania

“This is an invaluable resource for anyone bringing new talent into an organization. The upfront thinking and easy-to-use tools are key to making any external search a success.”

—Alan Cork, Executive Director, Russell Reynolds and Associates

“PrimeGenesis has done it again. Their new book presents a completely different and clearly better way to manage the whole process of recruiting, jump-starting, and managing new employees. It's hard to imagine anyone reading this book and not deploying its tools. Don't even think about starting to recruit anyone else until you've read this book.”

—Kenneth Beck, CEO, CEO Connection

“This book is a must read for leaders who want to set key employees up for success and ultimately have the new employee make a major contribution to improving the outcomes of the company in half the time. I am extremely impressed by how this book gives a practical road map for ensuring that someone is ready to take a key leadership position. This is not just a book, but a great tool that I am sure I will use every time a new employee is brought onboard.

This how-to book has already helped me with our current search for a new director of development. It could not have come at a better time. After losing a key employee during poor economic times, I was concerned with how to ensure that we can transition to a new director of development and fund-raising and not lose any revenue. After reading this book, I am confident that we will be able to get the right person up and running quickly and the team will be even more productive.”

—Anthony DiLauro, MSW, President/Executive Director, Boys  
Town New York



# **Onboarding**

**How to Get Your New Employees  
Up to Speed in Half the Time**

**GEORGE BRADT  
AND  
MARY VONNEGUT**



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Published simultaneously in Canada.

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ISBN: 978-0-470-48581-1

# Acknowledgments

Parts of this book have been around for a long time. The ideas have been implemented in the work of every manager who ever brought a new employee onboard successfully. The ideas have been obvious to anyone trying to figure out how to reduce the risk of failure of those new employees, accelerate their progress, and use the new arrival as an excuse to take the team to the next level. What we've done is take those different parts and bring them together into one cohesive whole.

We are particularly grateful to those people who have helped us pull those parts together over the past several years. We are grateful to our consulting partners in PrimeGenesis, to those who have used PrimeGenesis to help them or to help people in their organizations, and to those who support us in other ways. All share our journey of learning and discovery. All were our partners in this book, whether they knew it or not.

We are grateful to our Guest Experts. As you will see, we have different relationships with different speakers. Sometimes they spoke to us. Sometimes they wrote to us. Sometimes we repurposed what they wrote for others. Some agreed with us. Some disagreed. All helped.

Finally, we have to admit that this book wasn't actually our idea. Credit for that goes to Richard Narramore at Wiley, who inspired and enabled us to bring this spark to life.

# Part I

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

# Chapter 1

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

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

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

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

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

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

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

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

- People showing up to interview candidates without a clear picture of the position they're trying to fill, let alone what strengths they're looking for.
- High-pressure interviews that turn off exactly the sort of people the organization is looking to recruit.
- Closing the sale with a candidate who turns out to be wrong for the organizational culture.

- New employees showing up for the first day—and there's no one to greet them, no place for them to sit, no tools for them to work with, and no manager around to point them in the right direction.
- New employees getting off on the wrong foot with exactly the people they need to collaborate most closely with.
- New employees left to their own devices after day one because the organization has a sink-or-swim mentality.

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

—PrimeGenesis Client<sup>1</sup>

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

- 1.** A role failure due to unclear or misaligned expectations and resources (preparation miss). For example, a new global head of customer service who was hired before division heads had agreed to move customer service from their divisions to a central group.
- 2.** A personal failure due to lack of strengths, motivation, or fit (recruiting/selecting miss). For example, a new head of marketing who was hired with direct marketing experience that was woefully out of date.
- 3.** A relationship failure due to early missteps (head start/early days miss). For example, a new employee aggressively challenged a colleague before he or she fully understood the situation, making that colleague



reluctant to share information with the new employee after that.

**4.** An engagement failure due to early days' experiences (management miss). For example, a new employee's manager who was not around during the employee's first month due to other priorities.

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

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

*—Kevin Kelly, CEO of executive search firm Heidrick & Struggles,*

*discussing the firm's internal study of 20,000 searches<sup>4</sup>*

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

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

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

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

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


We are not reinventing the wheel. Most people understand or can quickly figure out the basics of acquiring, accommodating, assimilating, and accelerating new employees. Our core premise is that things work better when all efforts point in the same direction, integrated into

one Total Onboarding Program (TOP). Onboarding gets your new employees up to speed twice as fast as separate efforts to recruit, orient, and manage. It enables you to get more done in less time by:

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

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

---

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

---

**I. Prepare for your new employee's success before you start recruiting.** Understand the organization-wide benefits of a Total Onboarding Program. Clarify your destination by crafting your messages to the employee and the organization, and by creating a recruiting brief. Lay out your time line, and align stakeholders.

**II. *Recruit in a way that reinforces your messages about the position and the organization.*** Create a powerful slate of potential candidates. Evaluate candidates against the recruiting brief while pre-selling and pre-boarding. Make the right offer, then close the right sale the right way.

**III. *Give your new employee a big head start before day one.*** Co-create a personal onboarding plan with your new employee. Manage the announcement to set your new employee up for success. Do what it takes to make your new employee ready, eager, and able to do real work on day one.

**IV. *Enable and inspire your new employee to deliver better results faster.*** Make positive first impressions both ways. Speed the development of important working relationships. Provide resources, support, and follow-through.

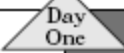
We created this approach out of the best of what we've seen and developed in PrimeGenesis' onboarding work since 2002 with a wide range of organizations around the world like American Express, Cadbury, Johnson & Johnson, MTV, Playtex, and others. The Total Onboarding Program has delivered breakthroughs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

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

- The *Producer*: While preparing for success and recruiting, think of yourself as the show's producer, assembling resources for the show.
- Then, the *Director*: While giving your new employees a big head start before day one, think of yourself as the show's director. You will co-create the plan, make introductions, announce the show, and generally get things ready.
- Finally, the *Stage Manager*: After your new employees walk out on stage, you will continue to Encourage—Align—Solve—End (EASE) their way by managing context and the things happening around them.

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

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

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

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

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

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

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

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

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



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

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

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

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

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

Take charge of the employee acquisition process by laying out and implementing a comprehensive marketing plan that starts with your target and moves through where you are going to fish for new employees, the tools and resources you will use, and your time lines/milestones. Communicate, demonstrate, and live your employment brand every step of the way. Assemble a deep slate of strong candidates at the same time to give you options, so that you don't feel you have to close the sale with your lead candidate if it's not 100 percent right for everyone.

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

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

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

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

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

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

- *Manager*: Close the sale. Support your new employee's due diligence efforts.
- *Employee*: Do a real due diligence.
- *Human Resources*: Support manager by preparing offer and supporting strategic selling efforts.

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