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# New Hire Momentum: Driving the Onboarding Experience



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## EXECUTIVE SUMMARY

There are few instances in the employee lifecycle as momentous as the first few months on the job. New hires join a firm with the promise of productivity. They are focused on opportunities to grow and develop in their careers while making a positive impact both personally and professionally. Loyal to their organizations, new hires bring with them an enthusiasm and energy that is contagious.

The anticipation and zeal new hires bring is consistent across industries, location, and size. It is a competitive advantage accessible to every firm willing to invest in the strategic design and deployment of a new hire experience. The monetary investment required can likewise be quite minimal, offering organizations with small talent management budgets the occasion to make a dramatic impact.

But despite this opportunity, our research shows that few organizations effectively capitalize on it. In a study of over 350 organizations, we learned:

### **Onboarding is a missed opportunity for the majority of employers.**

- ✓ Three-fourths of survey respondents report that onboarding practices are underutilized.
- ✓ Nearly a quarter of organizations have no onboarding strategy or process for internal hires.
- ✓ 60% of HR professionals say the top purpose for onboarding is to integrate employees into the culture, yet people and culture make up less than 30% of the focus in programs.
- ✓ 36% of companies have insufficient technology to automate or organize the onboarding process.

### **Consistent and collaborative onboarding programs reduce manager work-loads.**

- ✓ Managers frequently lack sufficient time and bandwidth to single-handedly support or implement onboarding efforts.
- ✓ Self-onboarding strategies, embedded content within online training, and onboarding platforms with interactive checklists, minimize the over-tasking of managers and co-workers.
- ✓ Delegating tasks cross-functionally or to specialized onboarding teams can ease these burdens.

**Organizations that design onboarding programs with explicit goals and measure success experience more positive organizational and business results.**

- ✓ Effective onboarding content incorporates the three Ps: *people*, *performance*, and *paperwork*.
- ✓ Paperwork can be minimized through automation or self-service, freeing up time and resources that can be spent on people and performance components, which have the greatest impact on organizational outcomes.
- ✓ More than half (55%) of companies do not measure the effectiveness of their onboarding, hindering accountability for success and preventing improvements.

**Plans to address these issues include an investment in resources.**

- ✓ 30% of companies intend to increase their onboarding budget in 2018, and most plan to invest in program consistency and software solutions.
- ✓ Currently, nearly 39% of organizations do not have the right onboarding technology in place to improve accountability, ensure consistency, and reduce administrative burdens.

In light of this, HR leaders need to re-evaluate how onboarding programs are structured and deployed within their organizations. The momentum of new hires is a force to be reckoned with, and it is possible to sustain this throughout and beyond the traditional 90-day onboarding timeline. We must be sharp and agile enough to capture this excitement and drive, and leverage it to propel our organizations and our talent forward.



Think, for a moment, about your first day in a job. Remember the anticipation of embarking on a new step in your career. Consider the desire and ambition you felt, prepared to demonstrate to your new team how dedicated and motivated you were to make a positive difference.

Who greeted you at the door? What kind of introductions were made? Did you get a tour of the office or workspace? Did you learn about the company's products and services and business model? How did you learn about and/or meet the other people within your team or function? Did you spend your first day filling out benefit forms, tax forms and reviewing the handbook? Was the history of the organization, and its guiding mission and values shared with you? How, and by whom? What type of training was provided to help you learn the expectations of your new role? Was your desk or office set up for you, with tools and technology in place?

Individually, these are small details, but collectively, they paint a picture of how an organization met—or mishandled—the innate excitement and devotion new hires (external or internal) bring to a role. These initial onboarding activities set the tone for employees, and can have a critical effect on how successful new hires will be in their roles.

## INTRODUCTION

Effectively attracting and retaining talent requires a series of integrated strategies, tools, and approaches. Notable among them is onboarding, the processes and programs that facilitate the necessary paperwork, acclimate new employees to the workplace culture, and expedite their performance.<sup>1</sup> Ideally, onboarding should orient both new and transitioning employees to an organization's values and mission, clarify the tasks and responsibilities of their roles, and determine the systems, tools, and resources available to them. When successful, onboarding programs reduce turnover, shorten time to proficiency, and increase productivity and employee engagement.<sup>2</sup>

Why then, isn't there more widespread and deliberate use of them?

“We are at the very basic level in onboarding; we have come to realize that orientation (paperwork and location of break rooms/bathrooms) is just not enough!”

—Survey Respondent

The rationale for investment is strong. Across the board, 2016 turnover was the highest in nearly a decade, with voluntary turnover and total turnover rates of 13% and 18%.<sup>3</sup> Employee departures were likely even higher among key demographic or generational segments. For instance, a 2013 study showed Millennials change jobs an average of 6.3 times between the ages of 18 and 25.<sup>4</sup> Onboarding programs can reduce new hire turnover, but 2016 research from the Human Capital Institute (HCI) showed that only 40% of organizations agreed their onboarding process is effective at retaining new talent.<sup>5</sup>

Disparity between the popularity of onboarding programs and their apparent effectiveness has become an important focus of recent research. Studies examine organizational contexts for onboarding programs to identify practices that produce the best results.<sup>6</sup> To be effective, the structure and content of onboarding programs must remain flexible with respect to workplace culture and employee roles.

Similarly, the earlier onboarding programs are launched after offer acceptance, and the more continuous the onboarding experience is, the more likely organizations are to report positive outcomes.

This HCI *Signature Series* research, conducted in collaboration with Kronos, explores the elements of effective onboarding programs and their organizational outcomes. Using a combination of surveys and interviews with subject-matter experts, we continue to explore the next practices in successful onboarding. We provide prescriptive measures practitioners and organizations can use to strengthen this critical moment in the talent lifecycle.

## PURPOSE AND STRUCTURE OF ONBOARDING

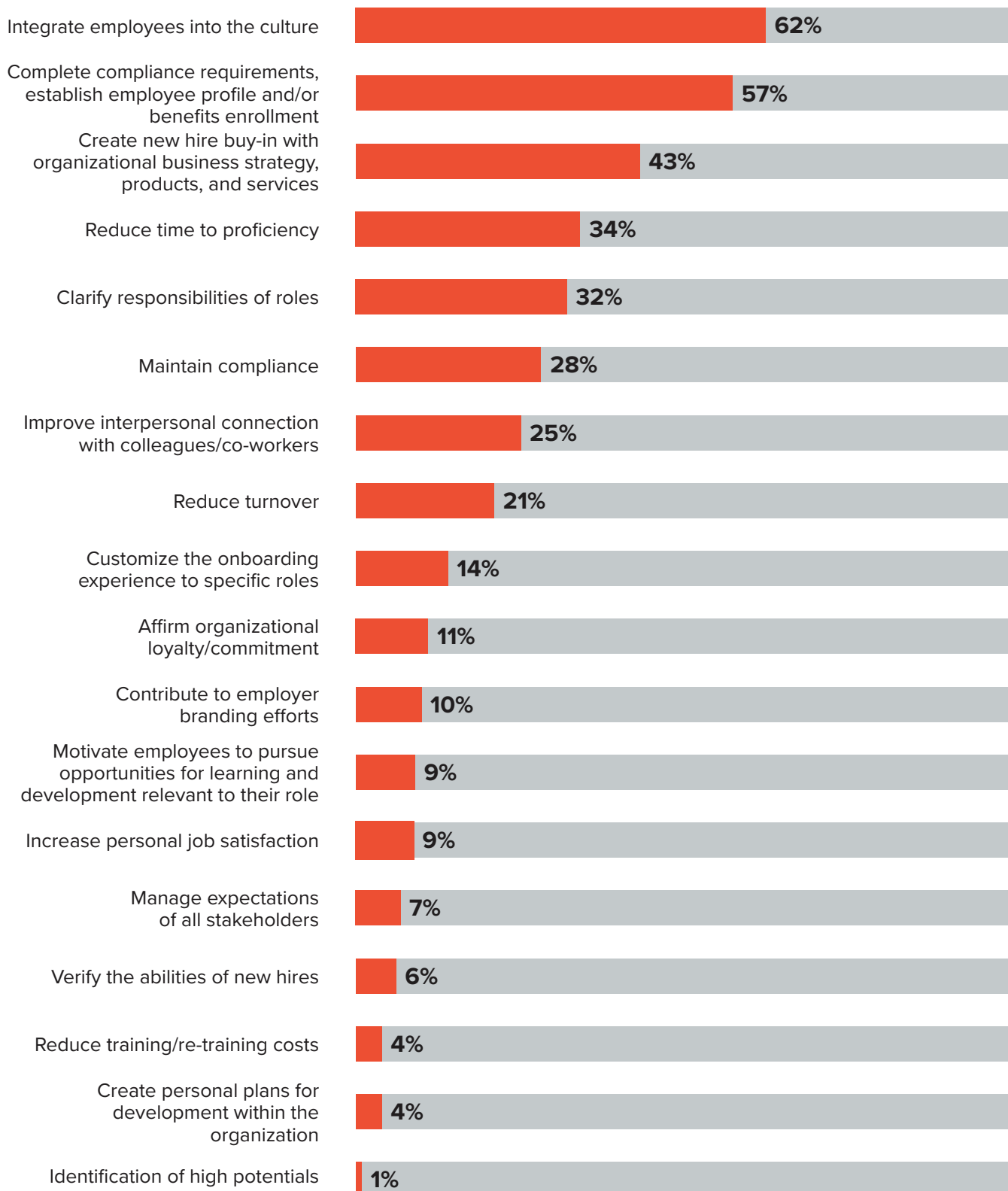
*People, performance, and paperwork* are three key components that are part of an onboarding program, and it is critical to address each in a meaningful and strategic way.

Our research found of the top four areas respondents said are primary onboarding goals, two emphasize people and culture (Figure 1). Similarly, half report that paperwork and compliance commitments are an important onboarding goal. A third of respondents indicate that reducing the time to proficiency is an objective, suggesting that onboarding is also an opportunity to drive performance.



FIGURE 1

**What are the four primary goals for onboarding programs at your organization?** *(Choose no more than four.)*

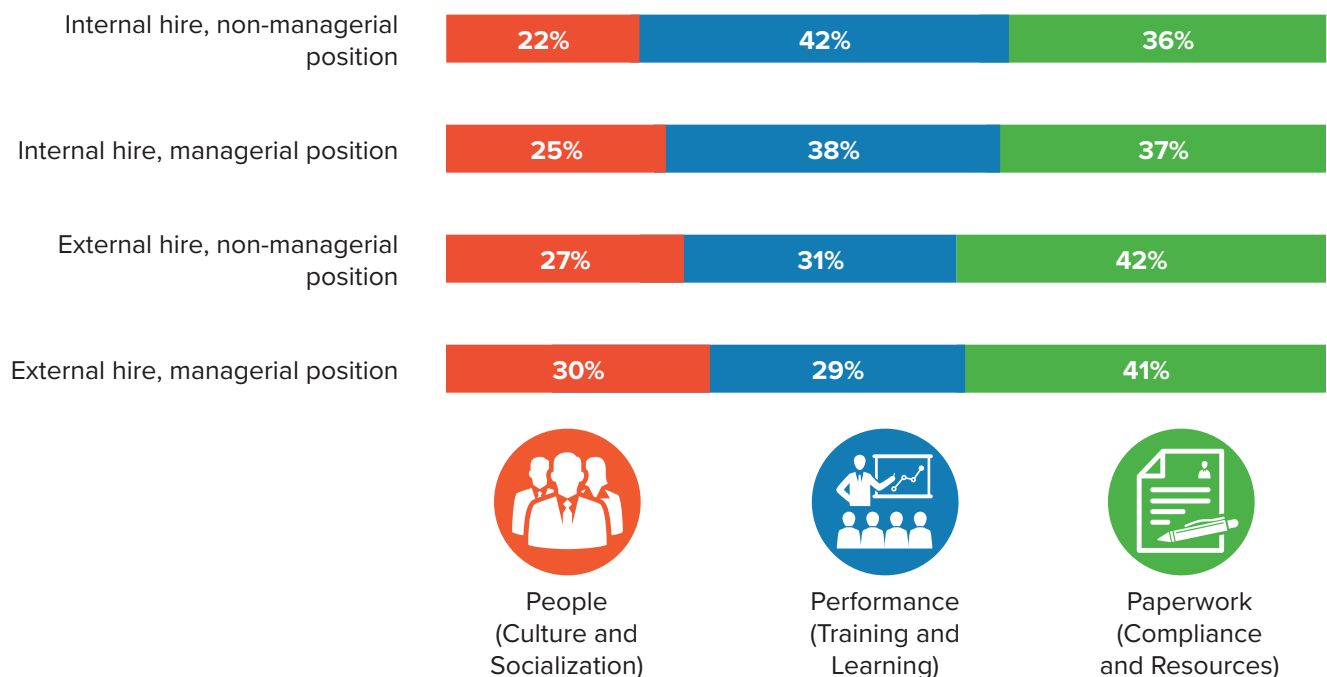




Unfortunately, our data suggest that the top goals of onboarding are not being addressed with current programs. Although 60% of respondents agree the primary goal of onboarding is to integrate employees in the workplace culture, this is not proportionally reflected in most onboarding programs (Figure 2).

FIGURE 2

**For each of the following, assign a percentage for how much each onboarding component is emphasized in your program. Each row must total 100%. (Mean proportion.)**



# HOW TO

## BUILD AN ONBOARDING COHORT

“Our onboarding program spans one year, so the group constantly ebbs and flows as employees hit their one year anniversary and new employees are hired. This helps connect our employees across departments and buildings as they go through onboarding. It also builds on the buddy system: you end up with a ‘buddy group’ from the month you were hired, and an even larger buddy group as you get to know the employees hired right before you and right after you.”

—Survey Respondent



## People

In our survey, HR practitioners and leaders rate how important the different types of people and culture onboarding activities are at their organizations. Almost half of respondents agree that setting up meetings with key stakeholders and the new hire's team members are very important (Table 1). Informal social events are an easy, inexpensive way to introduce a new hire to his or her new team but are not important to most of organizations surveyed.

TABLE 1

**How important is this onboarding activity or practice at your organization?**

People Onboarding Activities	Not at all important	Moderately important	Very important
Meetings with key stakeholders/teams	17%	37%	47%
Group onboarding	25%	37%	38%
Assign a buddy employee or ambassador	27%	39%	33%
Peer mentoring	25%	43%	32%
Meetings with senior leadership	28%	44%	29%
Team building activities	31%	42%	27%
Service or community oriented projects	39%	38%	23%
Informal social events	36%	43%	21%

A focus on people and culture is also correlated with positive outcomes—especially for external hires. The greater the emphasis on people in onboarding external hires, the more likely the organization reports stronger business and talent outcomes (Figure 16). Several respondents spoke to the value of incorporating multimedia that supports this perspective like welcome videos and gifs. “We use customer focus videos to tell the story of how we serve them and their importance to our values during onboarding,” one said.

“The value brought from people and relationships exceeds the support for ideas and efforts, and includes others providing access to valuable information. Leaders who invest in people are more likely to learn about historical precedents, failed initiatives, potential opportunities, unwritten rules, how their own teams are perceived organizationally, and the unique needs of the senior leaders who may control their fate.”

—Linda S. Reese, Ph.D., Managing Partner, Leader OnBoarding



## Performance

The conversations managers have with new and transitioning hires during onboarding establish the tone and cadence of future performance reviews. It is crucial then that managers share expectations and metrics of success with new hires. The greater the emphasis on performance elements during onboarding, the more likely organizations reported strong employee engagement scores for external hires, and the more likely they are regarded as an employer of choice (Figure 17).

**TABLE 2** How important is this onboarding activity or practice at your organization?

Performance Onboarding Activities	Not at all important	Moderately important	Very important
Manager monitors performance and provides feedback	10%	34%	56%
Manager provides written performance expectations and timelines	16%	37%	47%
Self-paced training resources/ Learning Management System	21%	37%	42%
In-person training classes	23%	40%	38%
Assess future training and development needs	23%	40%	37%
Discuss career goals and aspirations with manager	22%	42%	36%
Manager discusses transitions and expectations with the new hire's colleagues/team	22%	46%	32%
Job shadowing	33%	36%	31%
Customize onboarding components to meet specific requirements of role or position	30%	39%	31%
Match specific onboarding practices to how much support the employee needs during the transition	32%	39%	29%
Regular check-in meetings with HR about performance	39%	40%	20%
Access to a professional coach through the transition	61%	28%	12%

“We always give them a preview of what the 90-day performance review form looks like so they are well aware of how they are being measured, and what they are working toward. We lay out job description and expectations clearly throughout the interview and onboarding process. We talk about the performance expectations on a weekly basis.”

—Jamie Rivero, MSHRD, PHR, SHRM-CP, Senior Director of Global Human Resources and Operations, Fox Run Brands



## Paperwork

There is a place for forms and compliance in any onboarding program. Educating new hires on organizational policies, procedures, and resources is a critical part of acclimation and can also help expedite time to proficiency (Table 3). “At our organization our managers guide the new employee through the [onboarding] process with a checklist, resources, and tips,” one survey respondent shared.

Organizations that only focus on paperwork and compliance components in their onboarding programs report a negative relationship with a range of business and talent dimensions (Figure 18).

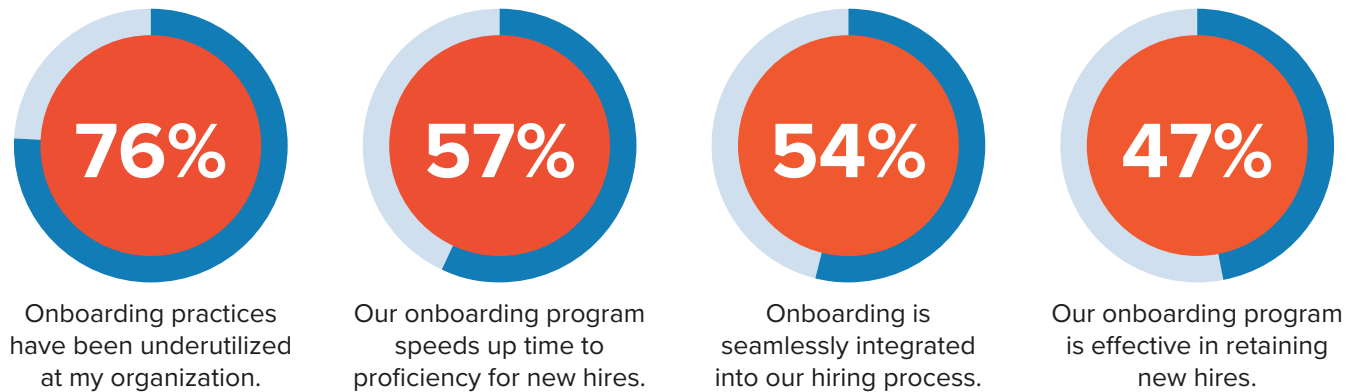
**TABLE 3** How important is this onboarding activity or practice at your organization?

<b>Paperwork Onboarding Activities</b>	<b>Not at all important</b>	<b>Moderately important</b>	<b>Very important</b>
Rules and regulations orientation (legal, policies, employee handbook, HR documentation, forms, benefits, etc.)	1%	23%	75%
Company orientation (overview of industry, mission, values, strategic objectives)	3%	23%	73%
Resources orientation (technology, workstation, building tour, contact information, etc.)	4%	34%	62%
Empower employees to complete their own paperwork and new hire forms	6%	33%	62%
Welcome email/call with first day agenda	16%	34%	49%
Company-specific employee forms with electronic signatures	21%	38%	41%
Monetary incentives to employees to complete onboarding	86%	9%	5%

## CHALLENGES AND OPPORTUNITIES FOR ONBOARDING PROGRAMS

Roughly three-quarters of organizations agree that onboarding programs are underutilized (Figure 3). Although more than half view onboarding as important to reduce time to proficiency, and many believe there is seamless integration of onboarding and hiring practices, only 47% agree their onboarding program effectively retains new hires.

FIGURE 3 Percentage Strongly Agree/Somewhat Agree with the following statements.



HR professionals report their top challenges for onboarding program (Figure 4) and four themes emerged:



#### **Consistency**

It is challenging to set up a standard, consistent foundation for all employees and then incorporate role specific personalization.



#### **Capacity**

Managers lack time and/or bandwidth to support or implement onboarding efforts.



#### **Accountability**

When onboarding is not consistently delivered or measured, it's difficult to maintain accountability for successful delivery and new hire experiences.



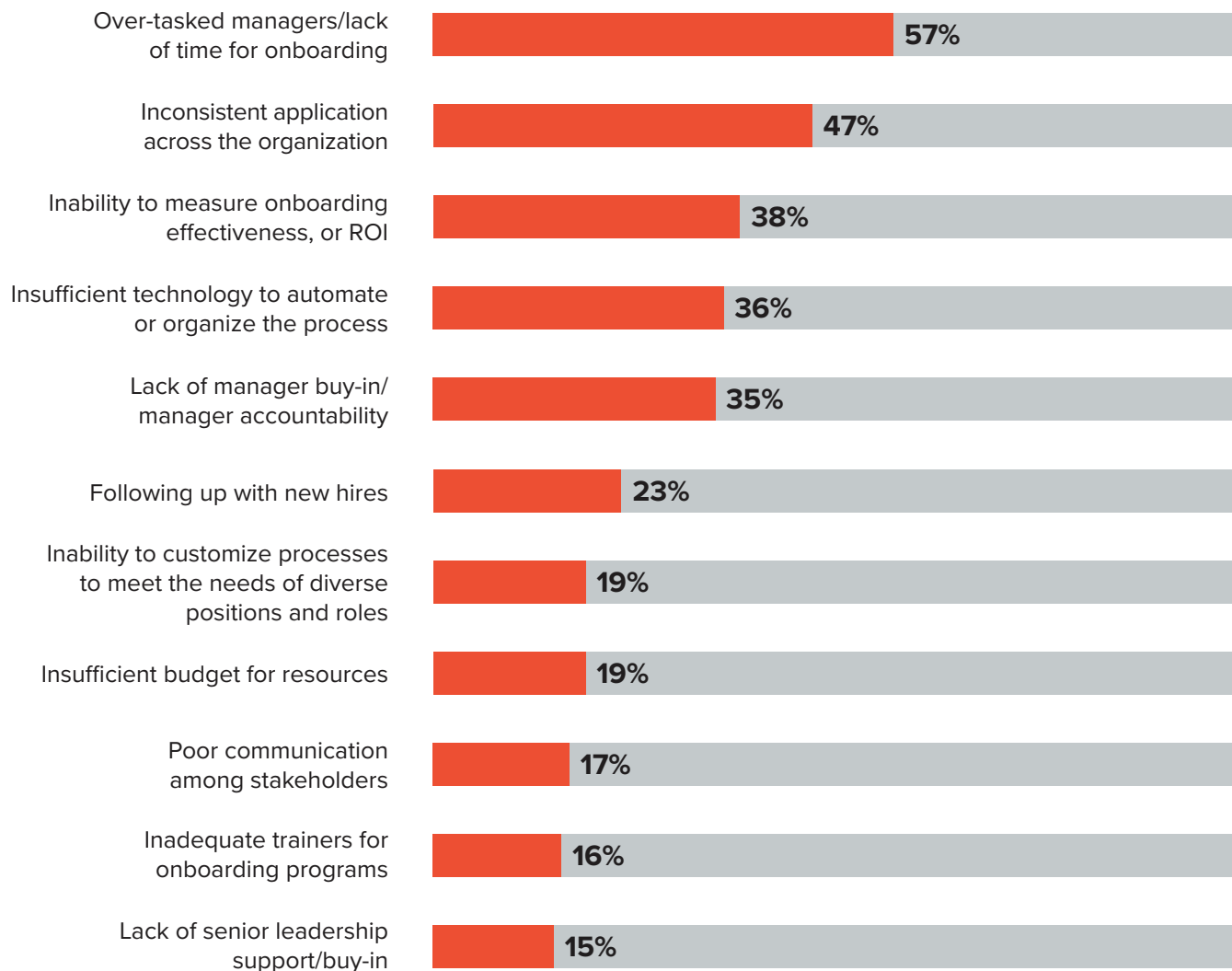
#### **Resources**

Organizations frequently do not have or use technology solutions that could improve onboarding accountability, ensure consistency, and reduce the administrative burden on managers and co-workers.



FIGURE 4

**What are the four greatest challenges to effective onboarding at your organization?** *(Select the top four only.)*



How can these challenges be addressed?

## CONSISTENCY

A best practice is offering all new hires a standardized onboarding experience that consistently provides individuals with foundational information. This ensures fundamental information is shared with every new or transitioning hire but still allows for customized functional or role-specific messaging.

A common failure of onboarding programs is neglecting internal or transitioning hires. In fact, organizations are more than twice as likely to offer consistent, standardized onboarding for their external hires than for internal ones (Figure 5). Nearly a quarter of organizations do not have an onboarding strategy or process in place for internal hires, and this is true for managerial and non-managerial roles. As organizations seek to retain top talent and provide opportunities for cross functional and upward mobility, it is important to consider the adjustments existing employees must make as they move into a new role.

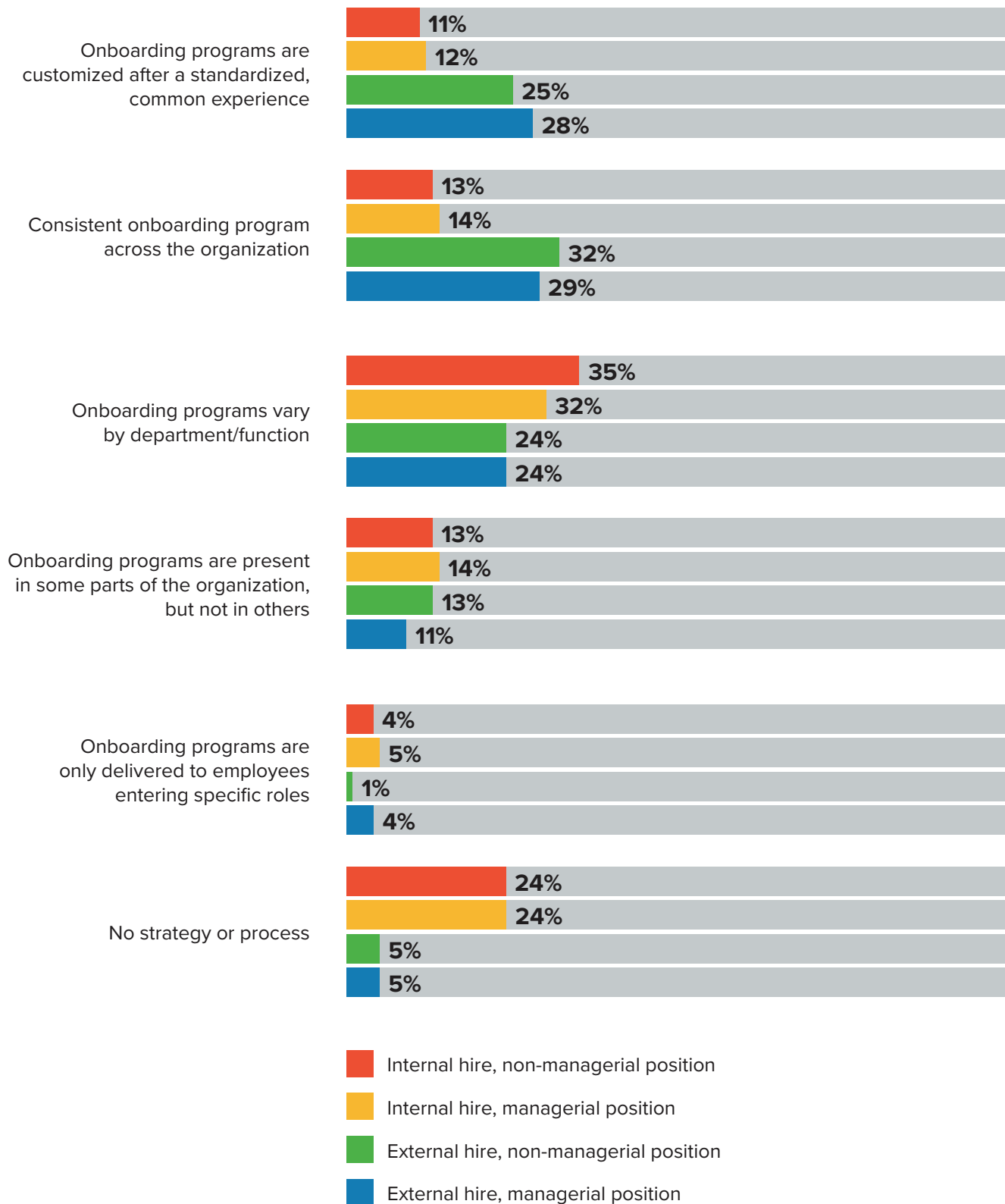
To further demonstrate the impact of internal onboarding, we created a measure of cohesion based on the items in Figure 5 that shows a strong relationship between consistent onboarding strategies and talent and business outcomes. Organizations that report greater consistency in onboarding across roles are more likely to indicate they are an employer of choice.<sup>8</sup>

“We scripted everything so they didn’t have to give it any thought. The introductory email that went out to all of the team members and the guide document tracked every step and gave them templates to use. We had a photo org chart so that they would know who key people were, people that were interacting with them. Every week we created this because at that time we had four or five people basically starting every week.”

—Ron Thomas MHCS, SWP, GHCS Country Manager International,  
Human Capital Institute

FIGURE 5

**For each of the following employee segments, how are onboarding programs made available at your organization?**



# HOW TO

## COMMUNICATE OPPORTUNITIES TO NEW HIRES

“We work with new hires in the beginning, showing them they can move up in the company, make more money, have pride in what they accomplish. We help them set goals for their future when most are not thinking beyond their next paycheck.”

—Survey Respondent

## Role Personalization

Specialized roles and functions often have unique micro-cultures and expectations, but all fall under the encompassing makeup of the broader organization. Onboarding programs must successfully navigate these layers. The most effective onboarding programs recognize that certain roles and functions, such as leadership positions or highly technical departments, warrant supplemental information and/or training. As an add-on to standardized onboarding content, ancillary customization can offer specific individuals extra support and further decrease time to productivity. Our experts provide recommendations on how to personalize onboarding programs:

“We have a special onboarding program for our senior leaders. It is different than our standard new hire program. We have a dedicated onboarding resource, which creates a detailed and customized onboarding program”

—Theresa Ludvigson

Sr. Director, Global Onboarding, Salesforce

“We suggest new leaders take the first 60-90 days to ask a lot of questions, seek to understand historical precedents, learn about important organizational norms and expectations, and build relationships with stakeholders up, down, and across the organization.”

—Linda S. Reese, Ph.D.

Managing Partner, Leader OnBoarding

## Onboarding Program Length

For 37% of respondent organizations, the duration of onboarding is minimal, ranging from a few hours to a week (Figure 6). Longer onboarding programs are associated with stronger talent and business outcomes such as increased aggregate scores on all talent and business outcomes<sup>9</sup> (See Figures 14 and 15), employee engagement, employer of choice, community profile/reputation, percentage of diverse hires, quality hires, and internal hires and promotions. Promisingly, more than half (53%) of organizations have implemented onboarding programs that last between 30 and 90 days.

Organizations with longer onboarding programs can also leverage participant experiences to drive continuous improvement. In one organization, this process has been formalized. As one respondent shared, “at 90 days, we ask new employees to make a presentation to colleagues and management about their recommendations to change and improve our business.”

Extending onboarding while also starting the program at offer acceptance (preboarding) is a best practice. Our expert explains what happens at her organization:

“The formal onboarding occurs the minute that finalist is identified, because then we’re going to make the offer. Basically, at that moment, we start to think of them as an employee, and that covers anything from getting their computer set up, their office set up, and their personal onboarding plans—starting with their hiring manager.”

—**Kathy Mills**

Talent Acquisition Operations Manager, Fortune 500 Company

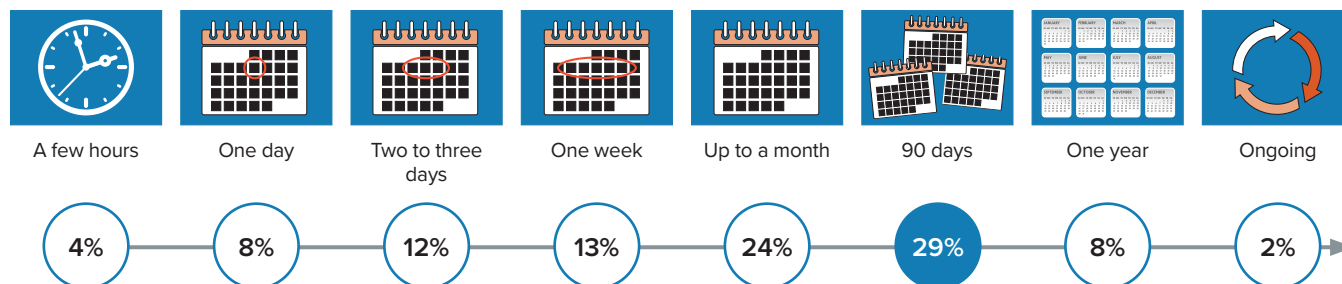
# HOW TO

## START STRONG WITH ONBOARDING

“We use multiple direct telephone contacts during the post-acceptance and pre-employment period to keep pending new employees “warm” until their start date. Multiple online pre-start onboarding tasks integrated with several company systems assists in the total onboarding process.”

—Survey Respondent

FIGURE 6 Over what time period does a typical onboarding process last at your organization?



## CAPACITY

The number one challenge facing onboarding is the over-tasking of managers and co-workers. Well-structured onboarding processes that include empowering new hires, leveraging cross-functional onboarding teams, and investing in technologies to automate administrative tasks can effectively address the issue.

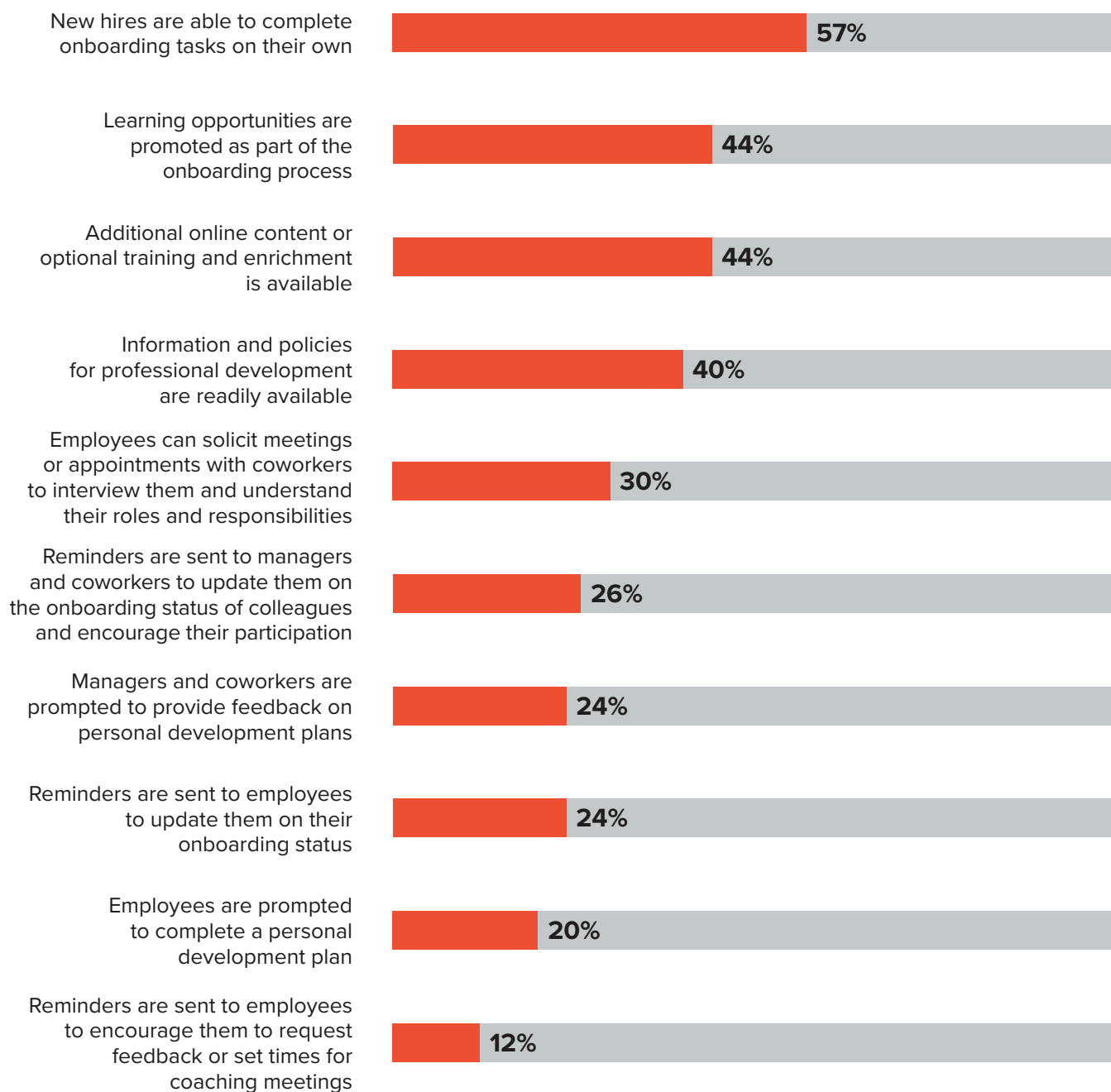
## Empowered New Hires

Self-onboarding strategies that feature embedded content in online training and onboarding platforms can automate task reminders and prompts, minimizing the administrative burden on co-workers and hiring managers (Figure 7). The automation of traditional time-consuming paperwork like benefits enrollment, asset allocation, gathering employee information, compliance-related tasks, and review of corporate policies empowers employees when they can complete this paperwork on their own time and it saves HR and managers time to focus on more personalized onboarding activities.

One respondent organization with a global presence echoed this method, writing, “We operate on five continents with varying time zones, so we implemented a web-based onboarding course facilitated by company founders and corporate directors to introduce general managers to the virtual network that they can use.”

FIGURE 7

**How does your organization empower employees throughout the onboarding process?** *(Select all that apply.)*





## Cross-Functional Teams

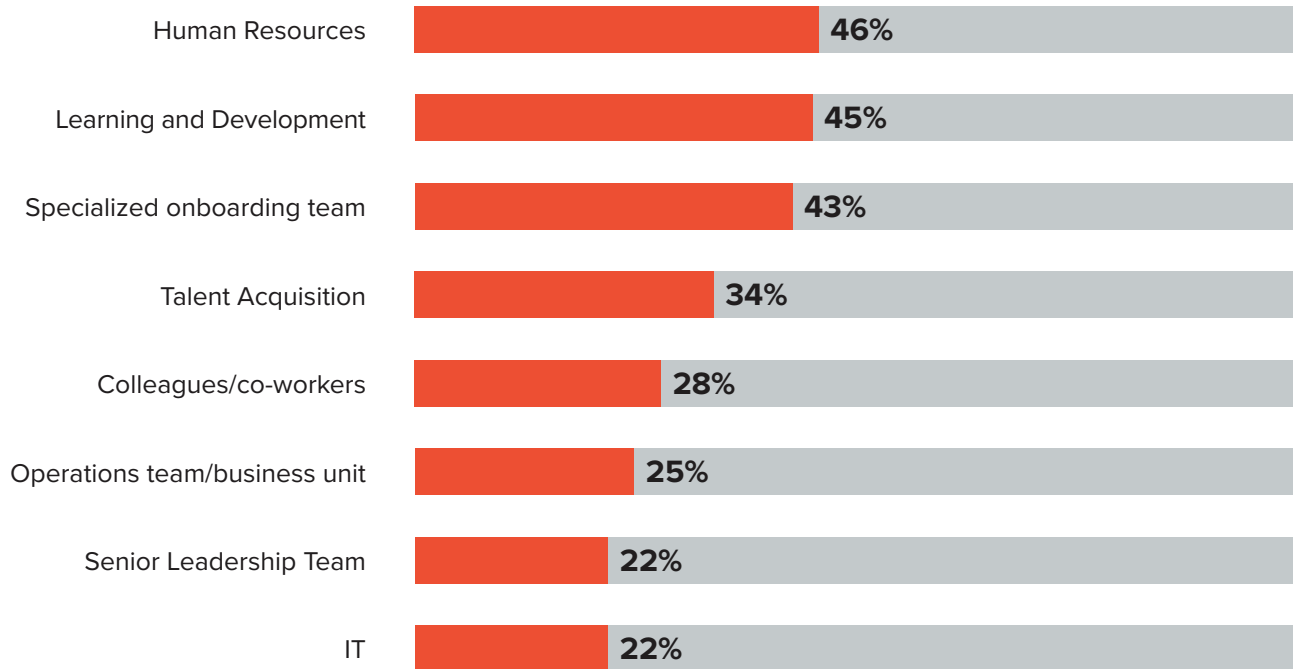
By all accounts, the most successful approach—and the least burdensome—is to divide onboarding duties up among a cross-functional team. Working together ensures that no one person or group is over-tasked, and it also offers new and transitioning hires the opportunity to learn from individuals from different functions and levels within the business. As one survey respondent remarked, “Our onboarding process is split among the manager/team/department, L&D, and the HR Business Partner. Everyone is invested in the new hire and their success.”

Three primary groups are very effective in driving the organization’s goals for onboarding: Human Resources, Learning and Development, and specialized onboarding teams (Figure 8). And yet, more than half (53%) of organizations don’t have a specialized onboarding team, and 20% do not have a Learning and Development function. Technologies would be useful to manage the tasks and provide updates for the all people and functions involved.

Smaller organizations without the budget or resources to have a dedicated person or specialized team can distribute the onboarding tasks across cross-functional stakeholders and use technology to reduce the administrative tasks.

FIGURE 8

**Of those organizations that have the following groups, how effectively do they drive the organization toward its goals for onboarding? Percentage rated as very effective.**



“One of the biggest challenges we are trying to address right now is making sure that all the groups, all the shared services that have a role in onboarding this new employee—[that] we’re all working with the same vision. We want to make sure that when we talk about creating that employee experience that is uniquely our brand, that we are consistent. What does that really mean? Does it mean that everything is perfect their first day? Does it mean that we’re providing constant and ongoing communication? Is it that they’re empowered? Is it that they know their resources? What does that really mean for us?”

—Kathy Mills, Talent Acquisition Operations Manager, Fortune 500 Company



## MEASUREMENT AND ACCOUNTABILITY

Evaluation is a key part of process design. More than half (55%) of organizations do not measure the effectiveness of their onboarding programs. Of those that do, the average number of measures examined is two; around one quarter of those organizations focus on employee satisfaction and one-year turnover rates as evidence of onboarding success (Figure 9).

FIGURE 9

**What metrics are used at your organization to measure the success of onboarding efforts?** *(Select all that apply.)*



Unsurprisingly, organizations that measure their onboarding programs report stronger talent and business outcomes. Organizations that report stronger profitability and productivity are more likely to analyze employee onboarding satisfaction. Turnover, too, is a commonly tracked metric and is most effectively measured by comparing high-performer turnover versus 90-day turnover rates as the former has a targeted, long-term focus. The measurement of 90-day turnover rates are negatively associated with profitability and productivity, but high-performer turnover rates are monitored in organizations that report stronger bench strength and more high-performers

### Time to Proficiency

One of the unsung heroes of onboarding programs are their potential to expedite the time it takes for a new hire to become productive. In fact, 33% of organizations agree reducing time to proficiency is an onboarding goal but only 7% measure it. Time to proficiency is a multifaceted metric but consider elements of it that are easier to capture: a new hire's knowledge of methodologies and processes; clarity on the organizational structure and "who's who"; current project duration from assignment to completion; frequency of project delays and/or advances, etc.

"Full performance is usually defined as being 80% proficient in a role. It is reasonable to expect the process to take 6-9 months for top leaders, and 3-6 months for individual contributors."

—Linda S. Reese, Ph.D., Managing Partner, Leader OnBoarding

## New Hire Check-Ins

A method to drive accountability is setting up regular check-ins with new hires to evaluate progress and address concerns. HR practitioners can lead this effort, supplementing the guidance a hiring manager provides. Some organizations use technology to manage the check-in process and ensure execution and consistency. Our subject-matter experts provide recommendations on how to build this process:

“The onboarding process isn’t merely the first week, but the 30, 60, 90 days after that. And it’s our responsibility as HR professionals to know how our employees like to be reached. Do they prefer email? Do they prefer private meetings? Do they prefer more structured follow-ups? If you’re going to put together a proper onboarding process that is my suggestion: be thorough through many check-ins with new employees throughout the process.”

—**Anthony Schullo, aPHR**

Talent Acquisition Specialist, ALE Solutions

“HR does a weekly check-in with the employee and the manager every Friday for the first month. These meetings are a great opportunity to enable feedback on both sides and gauge if additional training is needed [and also includes] goal setting. In the second month, onboarding reviews are held bi-weekly, and in the third month only HR conducts an onboarding review with the employee just to see how things are going. The onboarding is then formalized with a 90-day performance review [that] aligns with the feedback given during the onboarding reviews. These reviews ensure we are setting employees up to be successful in the organization.”

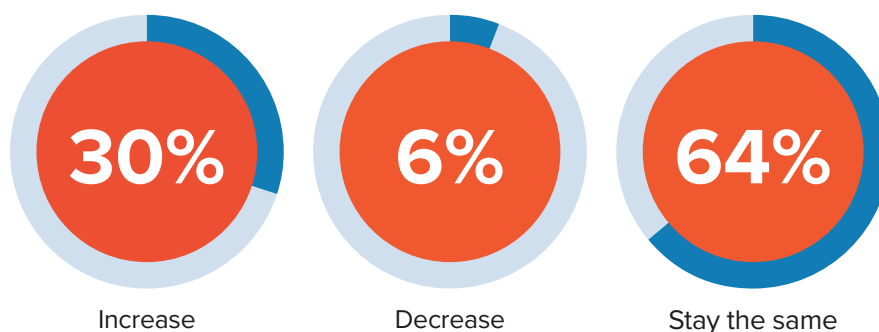
—**Jamie Rivero, MSHRD, PHR, SHRM-CP**

Senior Director of Global Human Resources and Operations,  
Fox Run Brands

## RESOURCES

Like any initiative, part of improving onboarding is the availability of budget and resources. Our data shows 30% of organizations will increase their onboarding budget in 2018 and nearly two-thirds will maintain their current budget (Figure 10). By contrast, organizations that plan to decrease their budget for onboarding also report weaker business and talent outcomes overall.<sup>22</sup>

FIGURE 10 **How will your budget for onboarding programs change in 2018?**



Those firms that intend to increase their budget will allocate additional resources toward designing a more consistent onboarding experience with software and technology support (Figure 11).

FIGURE 11 Verbatim responses of areas addressed with an increased budget.

## CONSISTENCY



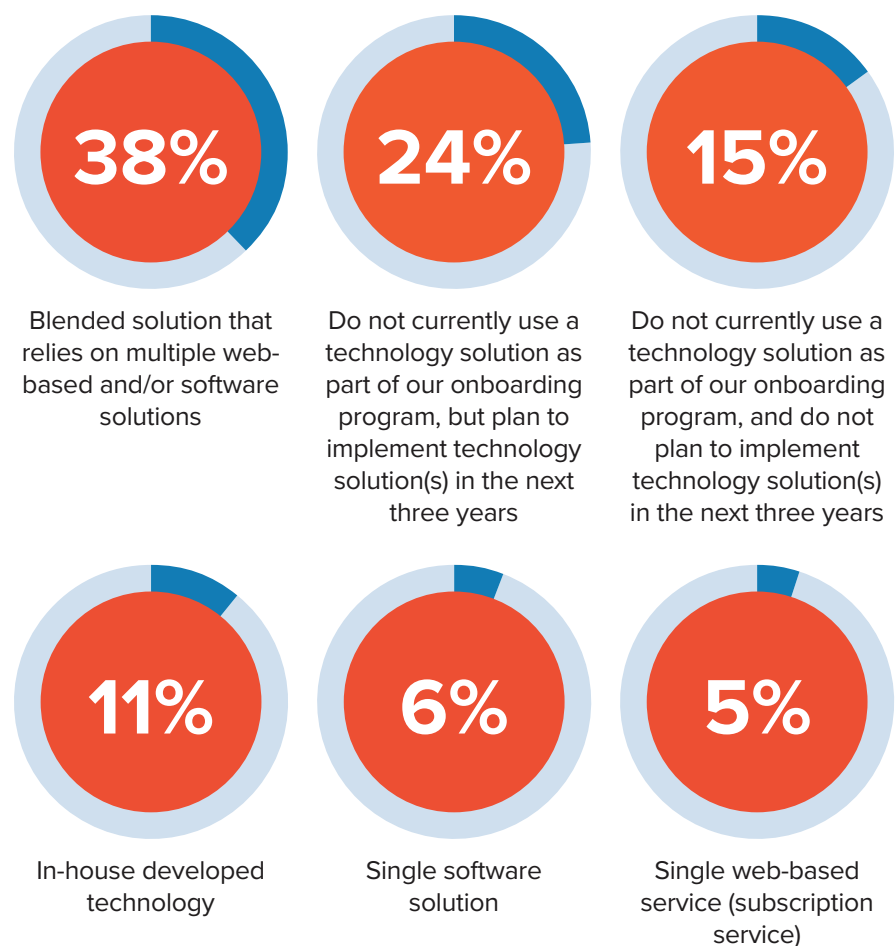
## TECHNOLOGY





Technology solutions can help ease the burden of onboarding on managers and self-service portals can empower new hires to find information on organizational norms, benefits, paystubs, and policies. Despite needing to minimize paperwork, improve program consistency, and invest in training, nearly 40% of organizations do not have comprehensive technology in place to address these onboarding goals (Figure 12).

FIGURE 12 **How does your organization use technology as part of your onboarding program?**



“Technology is what separates a really good onboarding program from a mediocre one. It’s reflective of our goals as a company to use technology to be more efficient and be more effective. When an employee is stepping in on the first day and they’re immediately introduced with technologies that make their life easier at work, it shows employees that their company is attempting to lead the way with technology.”

—Anthony Schullo, aPHR, Talent Acquisition Specialist, ALE Solutions

### Big Wins for Small Budgets

- ✓ Clarify the objectives of your onboarding program and communicate those goals across the organization.
- ✓ Establish a consistent foundational process and then personalize by role.
- ✓ Create a specialized onboarding team made up a series of cross-functional practitioners to implement the program collectively.
- ✓ Implement an ambassador or buddy system where veterans of the organization are paired with new hires for a set period of time to support transitions.
- ✓ Ask your HR and Payroll provider what they have to help you move to a technology enabled process or look for a cost effective solution.

### Big Gains for Large Investments

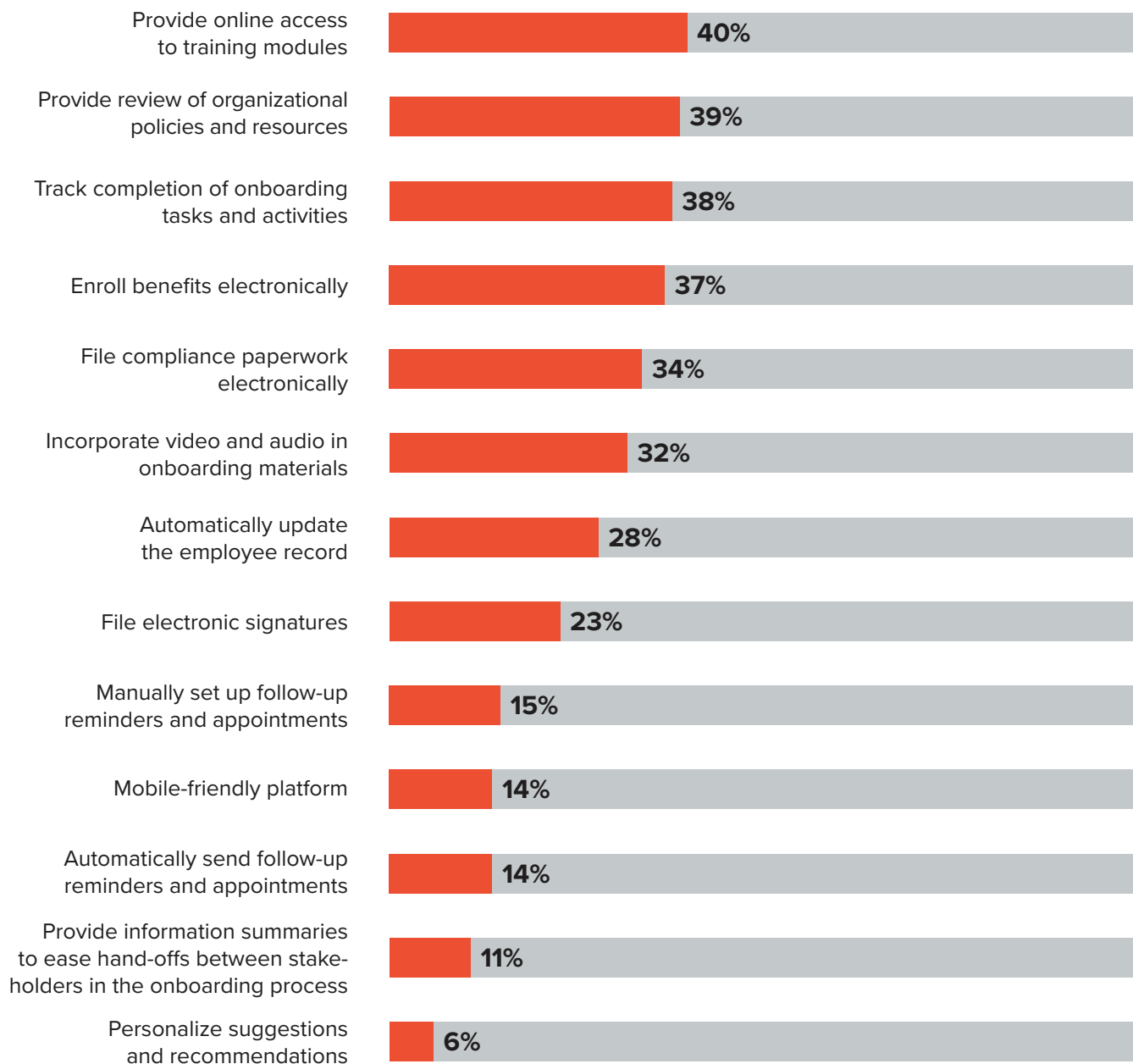
- ✓ Design or purchase a web-based or software platform to house self-service onboarding information and training that is integrated with your HRMS.
- ✓ Incorporate your organizational onboarding strategy with your Talent Acquisition function, ensuring consistency of messaging from each part of the talent lifecycle.
- ✓ Evaluate the data collection and analysis processes to more clearly identify and track trends and business impacts of strong onboarding programs, resulting in a cohesive continuous improvement process.



Organizations with onboarding technology have the most access to features that help to automate and streamline the more administrative components of onboarding (such as paperwork and compliance tasks), the ability to ensure a consistent core experience across the overall workforce with specialized experiences for specific roles as needed, and the ability to track the status of onboarding tasks for new employees and managers alike (Figure 13).

FIGURE 13

**Select the options available in your onboarding technology solution(s).** *(Select all that apply.)*



## CONCLUSIONS AND RECOMMENDATIONS

Well-structured onboarding programs that balance *people*, *performance*, and *paperwork* are an effective way to maximize the energy and excitement of new hires and set them up for long-term success. The moment a new hire accepts the offer or transitions internally in an organization, they should participate in a standard onboarding program. This immediacy and consistency ensures clear messaging and supports a strong employer brand. Custom content can then be added for functions and roles that require it, addressing nuances to specialized departments and positions. The impact and success of these programs should be continuously measured to drive updates and improvements.

Access to budget and technology resources undoubtedly make onboarding program improvements easier, but they are not a requirement for success. Organizations with smaller capacity can implement low-cost, high return strategies like creating onboarding specialization teams. Our survey respondents offer the following recommendations:

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**DON'T DELAY—**  
**Begin onboarding at offer acceptance.**

“New hires and/or team members transitioning to a new role are required to have a training/onboarding plan in place before they start their role.”

.....

“We provide new employees an outline of their first day. Then we set up time so they can meet a multitude of existing employees on their first day so they really like a part of a team.”

---

**DON'T HOARD—**  
**Delegate onboarding activities.**

“To make onboarding more effective, different practice groups get involved, paperwork gets completed, and new hires are onboarded in groups.”

.....

“As a smaller company, we find [setting up] one-on-one meetings between new hires and members of the senior leadership team right off the bat creates instant cultural buy-in and gets new hires engaged on day one.”

---

**CLARIFY AND  
COMMUNICATE—**

**Be consistent with  
expectations and messaging.**

“We are currently redeveloping our onboarding process, but the most effective change has been automating communication.”

.....

“We have guides for both the employee AND their manager so both can monitor their progress. It helps with commitment from the manager, and allows the new hire to work on their own/work ahead when others are not available for partner events.”

---

**FIND YOUR INSPIRATION—**

**Use creative, interactive  
ways to highlight your  
culture and values.**

“During onboarding, we share a video of our company’s founders about the beginnings of our company, their passion for this work, and one of the employees sharing their vision of the company’s future.”

.....

“We ensure from day one that the employee understands their purpose and role in the organization and develops a sense of community through a series of interactive exercises.”

---

**PLAY MATCHMAKER—**

**Pair new hires with peer  
mentors and shadow  
opportunities.**

“We have a mentoring program where each employee is assigned a mentor before they start. That person meets with them weekly (or more) as their resource for training and guidance for their first six months or employment.”

.....

“We established a virtual buddy system for general managers, which has proven to be a strong resource for adapting new hires into the organizational culture.”

.....

“Many of our employees complete job shadowing and a separate 10-day nesting period to support their transition.”

---

**TAILOR AS NEEDED—  
Customize additional  
content for roles and  
functions.**

“We are a small organization, so we are able to individualize much of the onboarding experience. This has been a big win with new employees and with the hiring managers.”

.....

“We use a customized training plan template for each role that managers just have to update/finalize for each new hire.”

.....

“We hold a general orientation for all system team members, and then have a mandatory campus orientation when they report to their campus for work. This allows us to [clarify and communicate] what is expected at each location/campus.”

---

The sincerity and passion among new hires is unmatched. Starting a new role is interesting and exciting, and it is the responsibility of organizations to protect and invest in that mindset, and extend it for as long as it can. Failing to capitalize on that motivation risks that those individuals will devote their energy elsewhere—and likely outside of the organization they just joined. Capturing new hire momentum is a strategic imperative that drives success and productivity. Don’t let busy schedules and limited bandwidth hold you back! It is an opportunity organizations cannot afford to ignore.

“Catering to individuals’ different learning styles and preferences helps them make a seamless adjustment to the company. The more comfortable they are, the more they will enjoy what they do.”

—Anthony Schullo, aPHR Talent Acquisition Specialist, ALE Solutions



## APPENDICES

## ENDNOTES

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4. Carnevale, A., Hanson, A., & Gulish, A. (2013). Failure to launch: Structural shift and the new lost generation. *Georgetown Public Policy Institute*. Retrieved from <https://georgetown.app.box.com/s/8tchnjo0wq9meamwwn5f>
5. See Note 2.
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7.  $r = .22, p < .01$
8.  $r = .26, p < .01$
9.  $r = .21, p < .05$
10.  $r = .19, p < .01$
11.  $r = .17, p < .01$
12.  $r = .21, p < .01$
13.  $r = .19, p < .01$
14.  $r = .19, p < .01$
15.  $r = .16, p < .01$
16.  $r = .22, p < .01$
17.  $r = .21, p < .01$
18.  $r = -.18, p < .05$
19.  $r = -.25, p < .01$
20.  $r = .22, p < .01$
21.  $r = .20, p < .05$
22.  $r = 2.83, p < .01$



## ABOUT THE RESEARCH

This research report was developed in partnership between HCI and Kronos. Between August 14 and September 1, 2017, a survey was distributed via email to those who opted into the HCI Survey Panel and the Talent Strategy and Development Communities. In addition, participation in the survey was promoted on social media channels. We received 399 completed questionnaires and removed 43 respondents who are either not involved with onboarding strategy or design, do not onboard new hires, nor participated in onboarding.

As part of this project, researchers conducted in-depth interviews with experts on the topic, including:

- ✓ **Theresa Ludvigson**, Global Onboarding Leader, Salesforce
- ✓ **Kathy Mills**, Talent Acquisition Operations Manager, Fortune 500 Company
- ✓ **Linda S. Reese, Ph.D.**, Managing Partner, Leader OnBoarding
- ✓ **Jamie Rivero, MSHRD, PHR, SHRM-CP**, Senior Director of Global Human Resources and Operations, Fox Run Brands
- ✓ **Anthony Schullo, aPHR**, Talent Acquisition Specialist, ALE Solutions
- ✓ **Ron Thomas MHCS, SWP, GHCS**, Country Manager International, Human Capital Institute

To supplement these methods, researchers reviewed relevant information from a variety of secondary sources, including academic journal articles, white papers, articles, books, blogs, and case studies. The results of this questionnaire, subject-matter expert interviews, and secondary sources form the basis of this research.

HCI researchers strive to understand the talent management and human relations practices that have the greatest positive impact on both individuals and their organizations. To this end, our research team has developed an inventory of seven talent and organizational outcomes (Figure 14) and eight critical business dimensions (Figure 15) for evaluating the relative strength and weaknesses of reported practices. These inventories are composed of items with five-point rating scales. Scores from these items are aggregated to create a composite score that reflects the overall strength of each organization in terms of their performance.

In this study, the following frequencies were found for survey participants reporting either slightly or much higher changes in talent and organizational outcomes:

FIGURE 14

**How have the following talent and organizational outcomes changes at your organization over the past two years?**

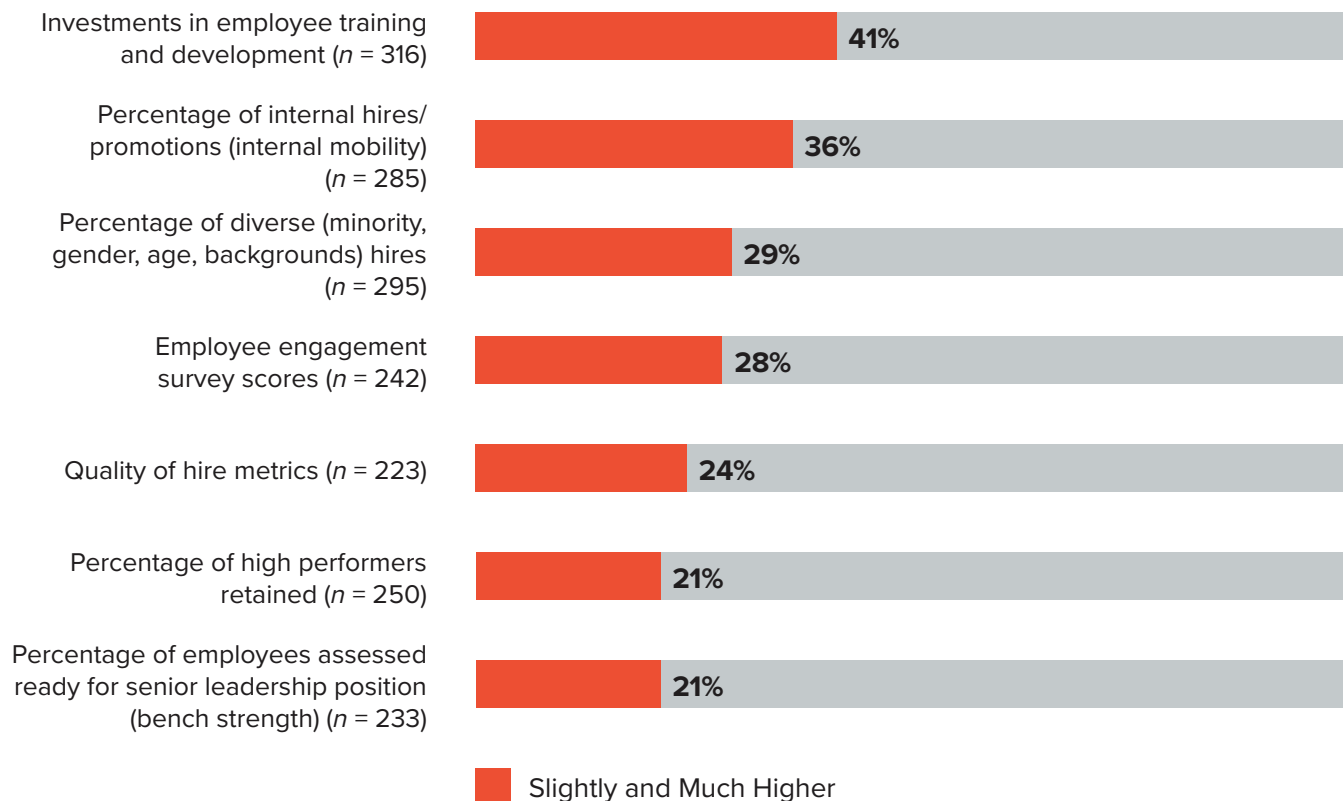
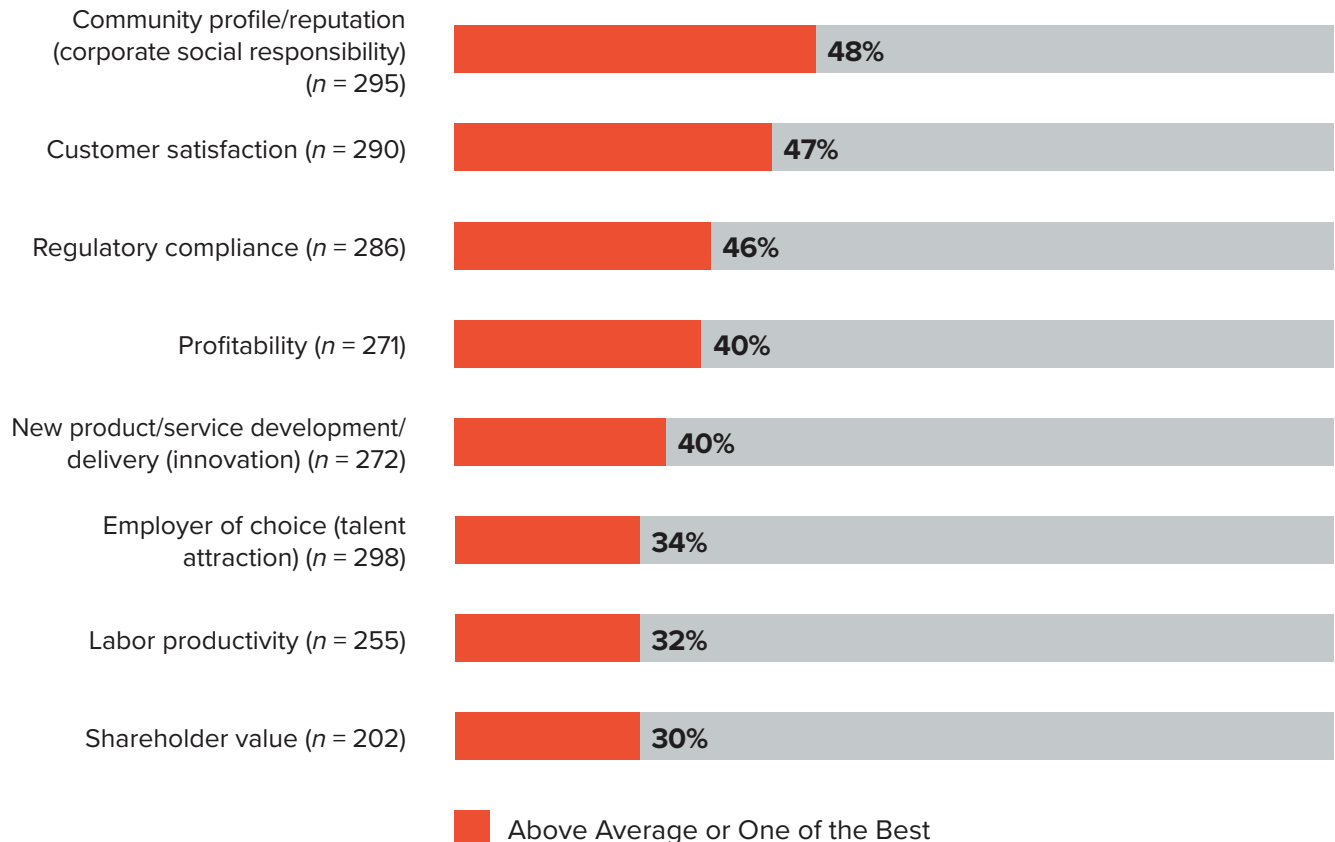


FIGURE 15

**Compared to your industry competitors, how has your organization fared in the following business dimensions over the past two years?**



We also examine practices in terms of an aggregate score that includes both talent/organizational outcomes and business outcomes. In this survey, 102 respondents provided complete information, with a mean score of 53.2 (out of 70 possible points). Highlighted cells in the figures below indicate the strongest correlations with coefficients above .250.

**FIGURE 16 Percentage onboarding emphasis on People, Socialization, and Culture and correlations with talent/organizational and business outcomes.**

Role		Significant Correlation with Select Outcomes							
			All business and talent outcomes	Talent outcomes only	Profitability	Employer of choice	Community profile/reputation	Employee engagement survey scores	Percentage of high performers retained
Internal	Non-managerial	r							.147
		p							.028
	Managerial	r							
		p							
External	Non-managerial	r	.308	.204	.172	.196	.133	.205	.165
		p	.002	.015	.006	.001	.026	.002	.011
	Managerial	r	.278		.177	.170	.123	.177	.163
		p	.006		.005	.004	.040	.007	.012

**FIGURE 17 Percentage onboarding emphasis on Performance, Training, and Learning and correlations with talent/organizational and business outcomes.**

Role		Significant Correlation with Select Outcomes							
			All business and talent outcomes	Talent outcomes only	Profitability	Employer of choice	Community profile/reputation	Employee engagement survey scores	Percentage of high performers retained
Internal	Non-managerial	r				.171			
		p				.009			
	Managerial	r				.214			
		p				.001			
External	Non-managerial	r						.134	
		p						.041	
	Managerial	r				.132		.173	
		p				.027		.009	

**FIGURE 18 Percentage onboarding emphasis on Paperwork, Compliance, and Resources and correlations with talent/organizational and business outcomes.**

Role		Significant Correlation with Select Outcomes									
			All business and talent outcomes	Talent outcomes only	Profitability	Employer of choice	Community profile/ reputation	Employee engagement survey scores	Percentage of high performers retained	Percentage of diverse hires	
Internal	Non-managerial	r	-.254	-.185		-.175			-.158		
		p	.017	.039		.008			.027		
	Managerial	r			-.145	-.210			-.173		-.164
		p			.040	.001			.018		.022
External	Non-managerial	r	-.282	-.201	-.140	-.224	-.189	-.278	-.182	-.160	
		p	.005	.017	.026	.000	.002	.000	.005	.007	
	Managerial	r	-.252	-.182	-.180	-.236	-.160	-.288	-.197	-.144	
		p	.013	.032	.004	.000	.007	.000	.002	.016	

## SURVEY RESPONDENT DEMOGRAPHICS

FIGURE 19

Seniority Level	
C-level	5%
VP-level	6%
Director-level	25%
Manager-level	36%
Individual contributor	26%

FIGURE 20

Functional Area of Respondent	
Human Resources	51%
Talent Management/Organizational Development	13%
Learning and Development	15%
Recruiting	8%

FIGURE 21

Size of Organization (Number of Employees)	
Fewer than 100	14%
100 to 999	47%
1,000 to 4,999	28%
5,000+	12%

FIGURE 22

Industry	
Healthcare	13%
Financial Services/Real Estate/Insurance	13%
Manufacturing	11%
Business/Professional Services	11%
IT Hardware/Software	6%
Non-profit	6%
Chemicals/Energy/Utilities	6%
Government	7%

Note.  $n = 356$ . Only proportions 5% and greater are listed. 76% of respondents' organizations are headquartered in North America.

## ABOUT THE RESEARCH PARTNERS



Kronos is a leading provider of workforce management and human capital management cloud solutions. Kronos industry-centric workforce applications are purpose-built for businesses, healthcare providers, educational institutions, and government agencies of all sizes. Tens of thousands of organizations—including half of the Fortune 1000®—and more than 40 million people in over 100 countries use Kronos every day. Visit [www.kronos.com](http://www.kronos.com). Kronos: Workforce Innovation That Works™.



We believe that strategic talent management is the only long-term, sustainable competitive advantage left today, and that most organizations around the world are struggling in this critical area. At our best, we change both paradigms and practices, and enable executives to make better, faster decisions than they could on their own.

HCI seeks to educate, empower, and validate strategic talent management professionals to impact business results through the acquisition of insights, skills and tools that are contextualized through research, practice, expert guidance, peer learning, and self-discovery. Visit [HCI.org](http://HCI.org) to learn more.



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Authors:

Jenna Filipkowski, Ph.D. ([Jenna.Filipkowski@HCI.org](mailto:Jenna.Filipkowski@HCI.org))

MaryFran Heinsch, M.A. ([Maryfran.Heinsch@hci.org](mailto:Maryfran.Heinsch@hci.org))

Aubrey Wiete, M.A. ([Aubrey.Wiete@hci.org](mailto:Aubrey.Wiete@hci.org))

1130 Main Street | Cincinnati, OH 45202

[www.hci.org](http://www.hci.org)



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