# KS

KEYNOTE SEARCH

# YOUR GUIDE TO ONBOARDING

**HOW TO IMPROVE YOUR ONBOARDING EXPERIENCE**

Employer checklists for preparation, the first day, and an overview of our Post-Placement Integration program

Congratulations on hiring your new executive. Now it is time to ensure that they kick off their tenure at your organization with a positive onboarding experience.

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**69%** OF EMPLOYEES STAY MORE THAN 3 YEARS WHEN RECEIVING GREAT ONBOARDING.
SOURCE: SPENCER STUART

# WHY IS ONBOARDING SO IMPORTANT?

You have spent countless hours, energy and money to ensure that you chose the right person for the job. Now it is time to secure your investment by ensuring that you set your new leaders up for success.

**82%**

**IMPROVEMENT IN EMPLOYEE RETENTION WITH A POSITIVE ONBOARDING EXPERIENCE**

*Research by Glassdoor*

**70%**

**IMPROVEMENT IN EMPLOYEE PRODUCTIVITY WITH A POSITIVE ONBOARDING EXPERIENCE**

*Research by Glassdoor*

**2X**

**MORE LIKELY TO LOOK FOR OTHER OPPORTUNITIES IF THEY HAVE A NEGATIVE ONBOARDING EXPERIENCE**

*Research by Digitate*

**1 WEEK**

Most organizations only focus on week 1 of onboarding according to HCI research. This type of short onboarding can lead to confused employees, discouraged and lacking the resources needed to get up to speed.

**58%**

of organizations say their onboarding program is focused on processes and paperwork according to HCI research. The best onboarding experiences are structured and strategic with a focus on people as well as administration.

**88%**

of organizations don't onboard well according to Gallup research. Only 12% strongly agree that their organization does a great job of onboarding.

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# POST-PLACEMENT INTEGRATION
## BEYOND ONBOARDING

We want to support you in taking your onboarding process to a whole new level - successful integration. Our Post-Placement Integration program is unique to our industry and is an integral part of our search process.  It consists of structured discussions with objective support and advice for your new executive during their first 90 days with one of our experienced coaches.

The goal of this program is to successfully integrate new executives to achieve quicker productivity, gain a deeper understanding of the business and achieve clear alignment and communication between the new executive and their teams.

# BEFORE THE FIRST DAY

By applying a structured, pre-planned approach to the new executive onboarding, you will be placing them in the best position to succeed.

Here are critical onboarding factors to consider to make a first great impression:

· Laptop
· Email & phone
· Security pass
· Business cards
· Announcement
· Swag
· Office supplies
· Benefits/payroll paperwork
· An assigned a mentor
· Employee handbook
· FAQ list (arrival time, agenda for the first day, organization's acronyms)

> " **PROPER ONBOARDING PREPARATION MEANS YOUR NEW EMPLOYEE CAN HIT THE GROUD RUNNING WITH LESS ADMINISTRATIVE WORK, SITTING AROUND WAITING AND CONFUSED ON DAY 1. THIS MEANS THEY'LL BE MORE PRODUCTIVE SOONER.** - JAMES BAKER, CEO, KEYNOTE SEARCH

# ON THE FIRST DAY

Having employees excited about the job, thinking that their first day went even better than they expected can set the tone for their entire career at your organization.

**THE DAY IS ABOUT PEOPLE. BONDING WITH THEIR TEAM, LEADERSHIP & COWORKERS - NOT ABOUT FILLING IN FORMS.**

**LIST OF CONSIDERATIONS FOR WHAT TO DO TO WELCOME YOUR NEW EMPLOYEE**

This is your chance to make a positive impression on your new executive. Don't let the day go to waste and contain nothing but paperwork and HR meetings. The first day is about making them feel welcomed and feeling like a part of the team by day's end. With that in mind you must focus on making them feel like a valued and important member of the team

- **_Office tour (if applicable)._** Your new executive will need to be guided around the office, shown amenities and the different work spaces and areas. Don't let this be a dull experience. Consider assigning a few key individuals to champion these tours. This will allow them to gain experience and feedback as to what new employees like, dislike and improvements on what resonates best. It will also ensure that you have consistency in messaging to your new employees.

- **_Introductions._** While you are touring, this is an easy way to introduce your team. Ditch the boring small talk and provide a valuable introduction where they are able to form a connection. Introduce the new executive by explaining their value and how they will be able to help the person they are meeting, and where in the process or projects they may interact. In addition, find a common connection. Whether it is a common interest, former employer, location or something where it will help both parties feel comfortable with one another right away. This is where your tour champions will be valuable as they will get to know everyone even better to help form connections between people.

- **_Setup._** The list of items that you prepared in advance of their first day (computer, phone, desk). Make sure they are ready for use and presented in a manner that makes them look more like a present. The desk should be setup with their computer, phone, security passes, office supplies, business cards, swag, etc. Spend an extra 10 minutes to decorate the office setup to really make them feel welcomed. These items are all about how you present it. If you are sending these supplies to a virtual employee, make sure that they are packaged properly in an exciting and presentable manner. Examples below.

- **_Lunch._** Take the team out for lunch with your new executive. This will allow them to connect on a more personal level outside of the office and truly get to know one another, the team dynamic and how the team interacts.

- **_Meeting with leadership._** One of the most important things on the first day is for a new employee to meet with their boss/management team. 23% of workers who left a role stated that they would have stayed at their position if they had been given clear guidelines as to what their responsibilities were, according to BambooHR. The management team will ultimately be responsible for their success so it only makes sense to have a meeting on day 1 whether it is in-person or virtual.

- **_Individual team member meetings (virtual or in-person)._** It is important that your new hire knows how they fit in the puzzle and where they will be relied upon and valued by their team. They should see a clear picture of their team members responsibilities to achieve the organization's goals.

- **_Vision and goals._** It is just as important to know the overall big picture, strategy - the "why" the organization does what it does. It is important for them to recognize areas of improvement and efficiencies, as well as how to align their goals and ambitions with the organization's. Employees want to do meaningful work and contribute as quickly as possible.
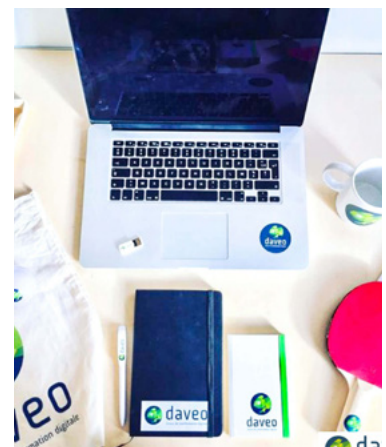
# 6 TIPS TO ONBOARD REMOTE EXECUTIVES

There are a number of employers that have now moved to a remote workforce. There are also a number of companies that continue to recruit a remote workforce, including executives. These new executives still need to be onboarded properly and given the support and resources necessary to succeed in their new roles. Providing an exceptional executive onboarding experience can help to reduce turnover, increase engagement, productivity and performance. Just because they aren't physically going to your office doesn't mean that onboarding is any less important.

**1. Begin with a clear explanation of your onboarding process, information and expectations.**
Never leave any gaps in communication and ensure that the hiring manager along with the new executive are both informed and have clear expectations about what the onboarding process will look like. Set a timeline with specific milestones that will be achieved during the onboarding process, what is expected of both parties, and communicate a clear understanding from both sides. This will ensure that both the employer and employee are aligned from the very beginning. The last thing you want is an executive to be unsure of what is happening and the next steps after accepting an offer. Especially during a time when insecurity is the norm, you don't want them to jump ship for another potential opportunity and quit before they even begin.

**2. Introductions and welcoming**
Encourage team members to reach out to your new hire and express their excitement to have them join the team. Whether it's through LinkedIn (you can send video messages or voice notes for a nice welcoming touch), email, or video conference software (Zoom), making them feel welcomed and a part of the team is very important, especially being remote. You don't want them to feel alone in their new role and ensure they know the support system that is there to help them with and lend a hand in their onboarding.

**3. Digitize your paperwork**
Digitizing your paperwork is a must for remote workers to be able to fill out all of their paperwork online. Software like DocuSign and Signority allow organizations to manage electronic agreements and eSignatures. There are still companies that have not yet embraced this technology which results in executives physically not being able to get paperwork back to their employers for a quick and smooth onboarding process. Many people don't have printers, faxes, scanners in their homes and don't have access to use one, especially during lockdowns. Ensure that your organization is utilizing smart technology to adapt to a remote onboarding experience.

**4. Equipment for home offices**

There are a number of individuals that do not have an optimal home office setup. They may not have needed one in the past. Even things like a desk and chair might be needed for someone to perform their job remotely in an ergonomic manner. Consider these needs of a new executive and make sure they are set up to perform and maximize their comfort and efficiency at home. Think about setting aside a budget for new remote executives to help them get set up in their homes. There are also the more obvious essentials to be able to work remotely, including a laptop. If their job requires the use of any software, consider installing everything before shipping it to ensure that all they have to do is open it up and turn it on. Not everyone is technically sound enough to be setting up the necessary tools and software on their own. Creating the easiest executive onboarding experience will go a long way - don't have your new hires frustrated by their tech or have a delayed ability to contribute to the organization on their first day. Consider the role and what office supplies are a necessity that would normally be at the office. Things like calculators, folders, pens, paper, etc. All of these considerations should be accounted for and shipped to the executive prior to their first day as well.

**5. Create and share your remote work policy**

According to upwork.com 63% of businesses (pre-COVID-19) had remote workers yet only 43% of those businesses had a remote work policy in place. Our guess is that the number of companies with remote workers has increased drastically and the percentage of those with policies has drastically decreased since COVID-19. Some of the items that may be in your remote work policy might include: typical hours of operations and hours of availability, how they are expected to communicate with team members, how to be reimbursed for office expenses etc.

**6. Create a positive employee experience on the first day**

Most companies would usually take out new hires for lunch on their first day. Since remote workers don't have that luxury, schedule a virtual coffee meeting with the team at some point during their first day. This will allow the new executive to connect on a more personal level outside of "work", get to know one another, and get a feel for team dynamics. How you onboard a new executive can set the tone for how their experience will be with your organization. The process you create needs to aim at engaging, retaining and achieving the peak performance of your new remote executives. Make sure you have a plan to receive and provide feedback to ensure you can optimize the process moving forward.
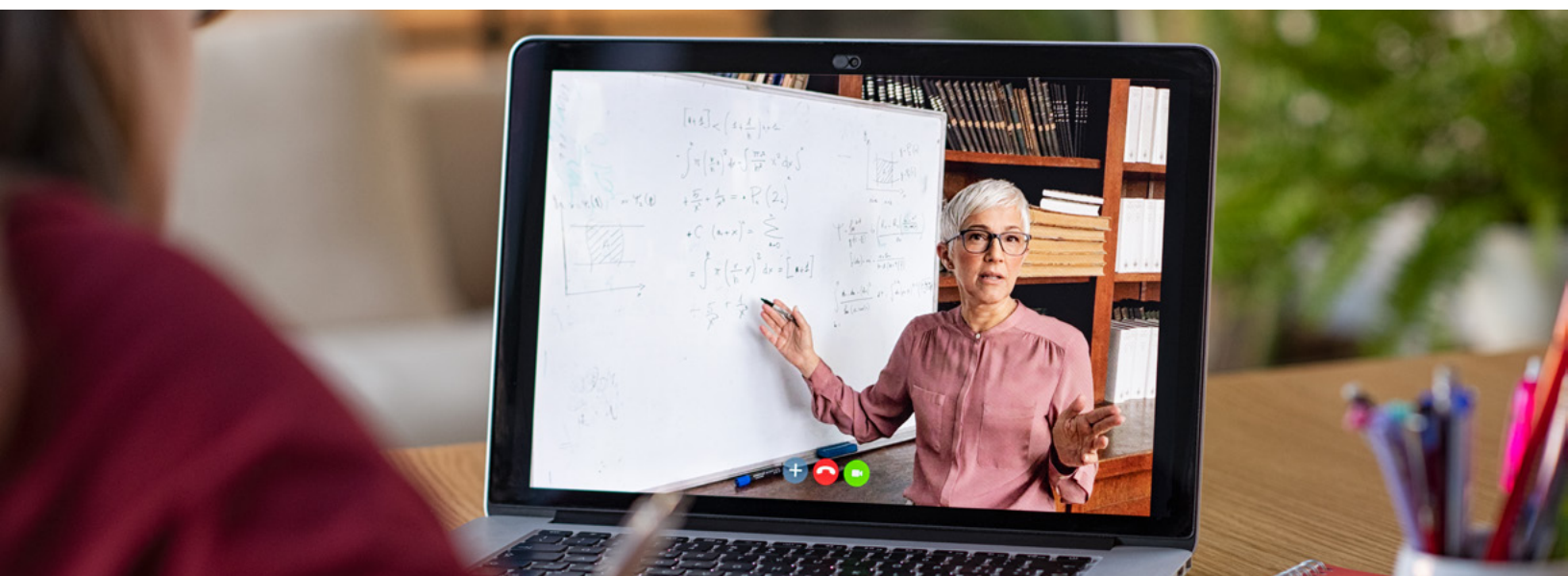
**INTEGRATION IS NOT A SHORT TERM VENTURE, THERE NEEDS TO BE A STRUCTURED PROCESS TO HELP A NEW EXECUTIVE FEEL ACCLIMATED AND MOTIVATED TO PERFORM.**
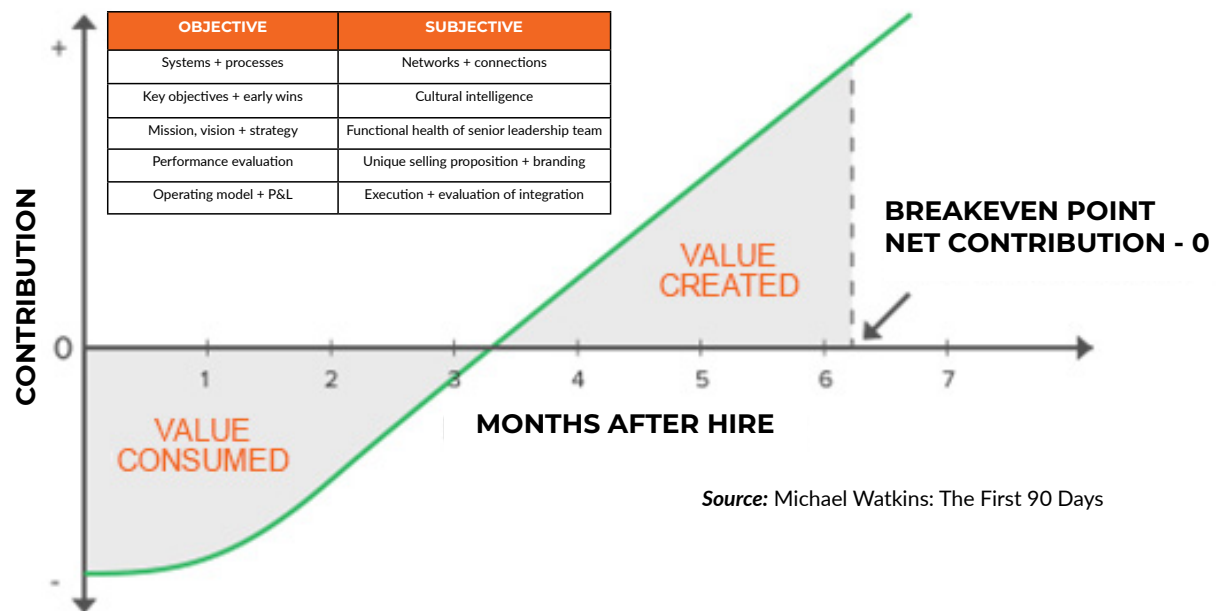
# THE IMPORTANCE OF
# POST-PLACEMENT INTEGRATION

We believe in the performance of the people we place. The first 90 days are a critical foundation to the success of a new hire. Our post-placement integration program is built around regular, collaborative meetings with the new executive, hiring manager and coach to support successful integration and quicker productivity.

The first few months of a new hire are both critical to early success and will also set the trajectory of their future productivity.

The goal is to surpass the breakeven point, where a new executive's productivity provides a return on the investment by the organization, as early as possible - we will support them to achieve this goal.

## THE BREAKEVEN POINT

| OBJECTIVE | SUBJECTIVE |
|-----------|------------|
| Systems + processes | Networks + connections |
| Key objectives + early wins | Cultural intelligence |
| Mission, vision + strategy | Functional health of senior leadership team |
| Performance evaluation | Unique selling proposition + branding |
| Operating model + P&L | Execution + evaluation of integration |

**BREAKEVEN POINT
NET CONTRIBUTION - 0**

VALUE
CREATED

VALUE
CONSUMED

CONTRIBUTION

MONTHS AFTER HIRE

*Source:* Michael Watkins: The First 90 Days

# OUR POST-PLACEMENT INTEGRATION

Our 90 day program includes regular meetings with the hiring manager and the new executive facilitated by an experienced coach who will ensure there is meaningful communication and alignment for a quicker productive integration.  There are 9 steps in the program spaced 2 weeks apart. Each step will address key milestones for successful integration.

- **Steps 1-2:** Set the structure and plan for the collaborative commitment required for the new executive's success.
- **Steps 3-4:** Review leadership style, organization onboarding process and strategic alignment.
- **Steps 5-7:** Discuss development of meaningful connections, key objectives and confirm alignment of the strategy, role and cultural expectations
- **Steps 8-9:** Review integration progress, address issues and discuss go forward actions.

Follow up discussions after 6 and 12 months are designed to confirm integration momentum.

## 60% OF COMPANIES FAIL TO SET MILESTONES OR GOALS FOR NEW HIRES
### SOURCE: LESSONLY.COM

## KEY MILESTONES FOR SUCCESSFUL INTEGRATION
### Networks + Connections

- Understand who your new executive will be working with.  What connections need to be formed and who are the influencers that your new hire needs to build meaningful relationships with early on.
- Regular discussions with your new executive should include specific opportunities to confirm their activities and give candid feedback. It is better to agree on how you are going to work with your new executive, and how they will collaborate with others, rather than having to course correct later.

### Business Model

- Sharing the business model will provide useful insights to understand what is and isn't important to the business. It provides a long-term vision of how they can make an impact and where their ideas can support productivity, growth and opportunities. This element is particularly relevant to incoming executives.

*Factors for consideration include:*
- Product: unique selling proposition, competitive position, mission, vision, strategy
- P&L, cash flow, projection models, organization's SWOT
- Go-to-Market strategy: marketing, sales, PR
- Meeting cadence, decision process
- Cultural drivers: revenue, profit, service, single voice, committee, top down, dominant personalities
- Maturity stage: start-up, scale up, turn around, realignment, steady growth
- Client base: how many, dominant sector/clients, client sentiment

## Key Objectives

- What are the senior leadership team's key objectives?
- Are the objectives realistic and achievable?
- What resources are employed to execute and measure?
- Ideally you should not expect more than 3 key objectives for this new role. Each objective upon completion should make a material mark on the business, otherwise it is not a key objective.

*Early Wins*

- Setting key objectives agreed mutually with the senior team and measuring progress is the method you can use to ensure you receive those early wins.

## Task Management

Task management is critical at any time but in the first 90 days of a new role it is particularly important. The new hire should have a system that works for them, for example:

- Set key objectives, timelines and metrics to measure execution.
- Divide tasks in to four quadrants:

|               | **Urgent**                         | **Not Urgent**                         |
|---------------|------------------------------------|----------------------------------------|
| **Important** | Urgent & Important                 | Not Urgent & Important                 |
| **Not Important** | Urgent & Not Important         | Not Urgent & Not Important             |

The goal is to work as much as possible on the Not Urgent & Important activities.

# DYNAMIC REALIZATION/ALIGNMENT

As your new hire goes through their first 90 days, ensure key items (positive or negative) that are or will have an impact on their successful integration are documented. These can be discussed in the integration program. It is not unusual to need a course correction during integration, but it is important to recognize when one is required rather than travelling too far down the wrong path.

**Keynote Search is here to support you through your new executive's integration process.**

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