



SUCCESSFUL ONBOARDING: BEYOND A CHECK-THE-BOX APPROACH

Best practices from senior HR executives

It is an all-too-familiar scenario: A company invests considerable time and resources into vetting a candidate and despite an exhaustive process and high hopes for the executive, the new leader struggles or fails in the role, only to move on and enjoy substantial success with another organization. How does this happen? What can organizations do differently to avoid hiring mistakes?

It turns out that the hiring process may not be the problem, but rather how the company does (or does not) support the newly hired executive in his or her earliest days. Typical onboarding programs cover basics such as meeting colleagues in different departments and geographies, and providing information about the immediate operating environment and processes. These efforts tend to be short-term, with little follow-up and no tailoring for the individual executive's role and background, potentially contributing to the executive's underperformance or even failure.

Why aren't more robust onboarding programs more common despite the risks of a less vigorous process? One reason may be that the key performance indicators by which these programs are measured usually focus on the quantitative: the length of the hiring process and the cost to hire the candidate, not how well the candidate performs over time. Spencer Stuart recently hosted events in Beijing and Hong Kong to discuss the challenges of onboarding and ideas for evolving to a more tailored, effective process. Human resources (HR) executives from companies across industries identified ways that leaders of the function and hiring managers can shift from a checklist approach to a more nuanced and successful onboarding solution that positions the executive for long-term success.

Start onboarding in the interview process

Some organizations have begun to rethink the conventional notion that onboarding begins on the executive's first day in the office. "From our point of view, onboarding starts at the interview," said one HR leader. "We are a family-owned company and have a very unique culture. We feel we can acquire skills, so we hire for personality because that can't be acquired. We also tell all our candidates the good and the bad." Painting a clear picture of the organization during the interview stage can help the new executive make a truly informed decision about joining and give him or her a head start on identifying potential challenges and priorities. One participant suggested that the hiring manager help manage peers' expectations as the new executive onboards, and bring them into the interview stage when possible so that the executive can gather multiple perspectives earlier in the process.

Add a personal touch

Small gestures, such as a welcome gift or a fully stocked office, can make a big difference in the onboarding process and set the tone for the executive's tenure with the organization. HR executives emphasized the importance of a personal touch, with one leader cautioning, "If you lose them on the first day, you lose them forever." In order to ensure that the "first day is a perfect day," the HR leader checks in with the executive prior to the start date so that everything the executive needs, from a laptop to business cards, is ready on day one. The HR leader then follows up with the new leader 30, 60 and 90 days later. Newcomers are also invited to join the planning committee for the company's year-end party so that they can meet their colleagues and become initiated into the culture early on.

Another organization arranges a karaoke dinner with senior executives, allowing the new executive to start building relationships. For recently hired executives who are new to Hong Kong, one company organizes a "treasure hunt" of various points of interest so that they can learn the area quickly in a fun way. One retailer inquires about executives' favorite candy during the interview process; on their first day, new executives find a bowl on their desks filled with their preferred sweets, as well as a wrapped gift box with some of the company's products.

Extend welcome efforts to the family

Many of the HR leaders in attendance highlighted the importance of onboarding the executive's family, especially in the case of relocation. One company houses newly hired expat executives in hotels for their first month and stocks the room with imported brands of cereal to make their children feel at home in a new environment. Others tap social media and have created Facebook groups to share local tips and knowledge with expat executives and their family members. Career counseling for the executive's spouse has also proven to be a valuable onboarding tool.

Broaden the perspective on the business and key stakeholders

Onboarding programs usually provide brief glimpses into different aspects of the business, with a focus on the current operating conditions. The cursory nature and brevity of onboarding does not always present the full picture of how individual functions of the business connect and who the key stakeholders are.

A new executive's long-term success does not occur in a vacuum. He or she must be able to collaborate with peers in order to execute organization-wide objectives. However, the executive may not have the opportunity to meet with fellow leaders on the team or in other functions during the hiring process. Because it is not necessarily obvious who the key stakeholders are in complex organizations, HR leaders can provide important perspective by explaining the roles of various parties to the executive and with whom he or she should meet in the immediate term and over the coming months, as well as suggested topics to cover. They can also delve into the performance management system and how the executive's performance objectives contribute to the execution of the overall organizational strategy, while the executive's boss can focus on business models and financials.

Ensure that onboarding is truly onboarding

According to one HR leader, onboarding should not be code for “hitting the ground running,” where the executive has a few orientation meetings and simultaneously dives into substantial projects. During the first week new executives join her company, they do no other work besides meeting with the individuals who are pertinent to their roles. The HR leader then meets with the executives at the end of each day to discuss any questions or issues, and must sign off on their completion of the program. In another organization's onboarding program, new executives are prohibited from accessing certain parts of the company's system until they complete the required stage of training. One technology company has a 180-day onboarding program — with milestones for orientation, culture, a new hire survey and lunches with senior executives spread out over the course of the program — and new hires are given a “passport” that is stamped upon completion of each stage and are given a final prize.

Use assessment to help establish realistic expectations and development plans

Although expectations are often discussed before joining an organization, a new executive does not have the opportunity to meet with every potential constituent and understand the varying, and, at times conflicting, expectations. The hiring manager typically delivers the first and, often, most enduring message about performance expectations for the new executive, making it all the more integral to outline clear goals and how they will be measured from the outset. Many organizations have standard objectives for certain roles, and some have found that assessing how the individual executive's strengths and weaknesses align with these objectives can help provide a customized roadmap for the obstacles and opportunities the executive could face.

One HR leader said her company recently instituted a competency assessment for all new senior executive hires to diagnose developmental needs. The senior leaders are then sent offsite to work on building those competencies together as part of what the organization calls the “New Hire Learning Journey.” Another HR leader noted that while some executives are hesitant to be assessed on strengths, weaknesses and personality so early in their tenure, understanding potential traps helps to ensure a successful onboarding process.

HR leaders can use assessment results to help new executives build self-awareness about their strengths and weaknesses and how their style fits within the culture. For example, is the new leader an analytical decision-maker or more likely to make choices based upon experience and intuition? Is he or she a strategic thinker or great operator? The answers can help the leader play toward his or her strengths and also identify what complementary capabilities may need to be added to the team. If the situation is appropriate, one HR leader gathers and shares anonymous feedback about critical new hires three months after their arrival so that they can develop and present personal action plans to their teams, ensuring that expectations are met and acted upon. This feedback process is time-intensive, but can be beneficial for executives receptive to feedback who are brought in as “change agents,” into ambiguous organizational situations or who were promoted internally. For senior-most executives, informal, one-on-one feedback is typically the best approach.

Devote time to organizational culture

Understandably, the pressure to perform can outweigh the desire to navigate the particulars of culture for some new executives. And yet, lack of cultural fit with the team and/or organization is often regarded as the top derailer of an otherwise highly capable leader.

Dedicating time to discuss team and organizational dynamics during the interviewing and onboarding stages can help the new executive avoid invisible cultural barriers. Tools that illuminate individual communication and working styles can help new executives grasp how colleagues and team members prefer to receive information and make decisions. One executive said he keeps a personality profile of all his subordinates close at hand, referring to it when he encounters difficulties working with an individual. The profile reminds him about the underlying differences in their styles and how he can adjust his style to improve communication and engagement.

Culture can be nebulous and is often the most challenging area for a new leader to understand quickly. HR leaders can play an important role in conveying the softer, more informal aspects of how the organization or team operates and “the way we do things here.” New executives often find explanations of the decision-making process valuable. For example, do decisions come from the top down or require consensus-building? Guidance about how to prioritize the cultural preferences and underlying values can help the new executive navigate what can be murky territory. A deep understanding of the executive’s working style and ability to work with others can help provide more tailored guidance to the new leader on how to engage others in this environment.

Newly hired executives: Taking a proactive approach to your onboarding

To ensure you get the most out of your onboarding process and are poised for long-term success, the HR leaders in attendance offered the following recommendations:

1 Don't solely focus on your superiors.

Building rapport with superiors is always a priority, especially when one or more of your superiors are not in the same region. However, it's also vital to build relationships with peers on your own team and across functions, which is particularly important in a matrix organization.

2 Lean on HR leaders.

HR is a valuable resource in gaining an understanding of your team's capabilities and potential gaps. HR leaders can help you identify top performers and potential constraints you may face in building your team — beyond what may appear on paper.

3 Clarify expectations and communicate them clearly.

If you are brought in as a “change agent,” striking the right pace of change can be challenging — you cannot make big promises because you need to ensure changes are embraced by team members, and yet you were hired to drive transformation and deliver results. One leader shared that he sensed resistance to changes he was instituting within his team, which were, in fact, driven by the CEO. He sought help from his HR leader, who was able to confirm the CEO's mandate with the team and instill a greater sense of urgency around next steps. Be mindful of the different stakeholders and communicate clearly, openly and frequently with them to understand expectations and reevaluate them when necessary.

4 Know yourself.

Understand your own personal style preferences, values, motivations and character strengths. Comparing how those individual drivers fit with the organization and team culture can greatly accelerate your integration.

Conclusion

Organizations spend considerable time finding the right executive for a particular role — the onboarding process should take a similarly nuanced approach. Often, if there is a problem with a new executive's integration, there is a tendency to wait until it is too late to address it. Leaders in attendance noted that the earlier an issue is exposed, the easier it can be resolved. The timely identification of issues and the long-term effectiveness of the onboarding process require a sustained commitment from the hiring manager, HR, the new executive and every key stakeholder. A more systematic, tailored onboarding process is only the beginning of lasting success for the entire organization.

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