

# What Works in Role-Specific Onboarding

Norma Dávila and Wanda Piña-Ramírez

# Introduction

Onboarding programs are designed to ease the transition from candidate to productive employee.

Many of these programs still do not offer a targeted component for employees who are assuming particular roles known as role-specific onboarding.

Companies often assume that employees whose roles change already know the company and the new role and do not provide them any role-specific onboarding.

Today we will introduce you to role-specific onboarding and specific steps that you can take to include this component in your company's onboarding program.



**Get Them  
ON BOARD!**

# Today's Webinar





I'M  
NEW

## Poll

Does your company have an onboarding program?

- A. Yes
- B. No



## Poll's Results



Today's Reality

# Challenging New Work Environment

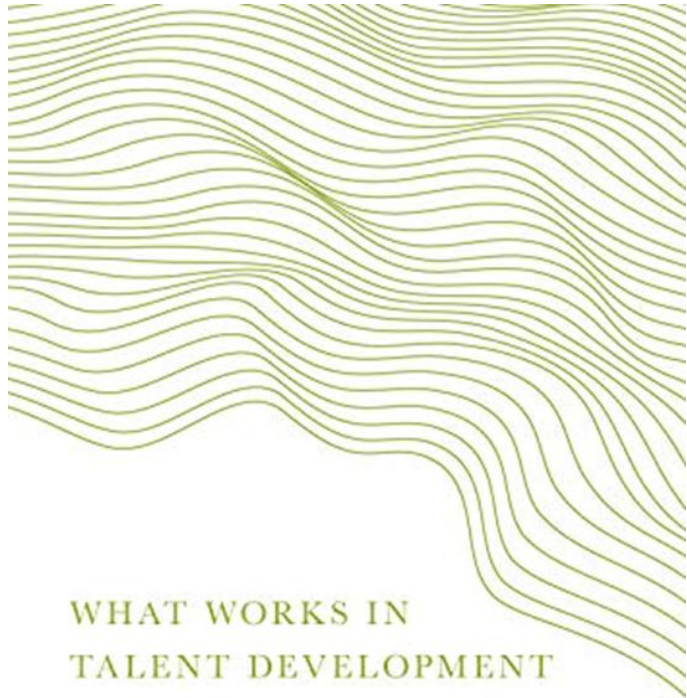
- ▶ Generations
- ▶ New Working Trends (flexibility, work life balance, etc.)
- ▶ Increased transparency
- ▶ Mobile world
- ▶ Social Media
- ▶ Older workers' participation in workforce is increasing
- ▶ Cultural challenges
- ▶ Diversity and Inclusion





Onboarding is a  
Portion of the  
Employee Life Cycle





WHAT WORKS IN  
TALENT DEVELOPMENT

| Effective Onboarding

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# Employee onboarding is...

“[T]he process through which companies engage new employees or new to role employees in the company’s culture and with their role.”

*(What Works in Talent Development: Effective Onboarding, p. 10)*

# Poll

Does your company offer role-specific onboarding?

- A. Yes
- B. No





# Poll's Results

# Orientation vs. Onboarding

## Orientation

- ▶ Time-bound single event
- ▶ Consists mainly of structured presentations
- ▶ Introduces employees to company policies
- ▶ Allows time to complete paperwork

## Onboarding

- ▶ The employee can relate to the organization
- ▶ Emphasis on company brand
- ▶ Differences between departments
- ▶ Clarifies scope of market
- ▶ Introduces organizational structure

# General vs. Role-Specific Onboarding

## General Onboarding

- ▶ Company culture common to all
- ▶ Ground rules for new employees such as dress code, security, safety, and social media policies
- ▶ Specialized training common to all such as sexual harassment and use of self-service portals
- ▶ Learning and Development and HR lead it

## Role-Specific Onboarding

- ▶ Tailored for each position
- ▶ Emphasis on culture of department or unit
- ▶ Clarifies what it means to perform at expected levels
- ▶ Managers lead it

# Most Common Onboarding Roadmap

Day 1

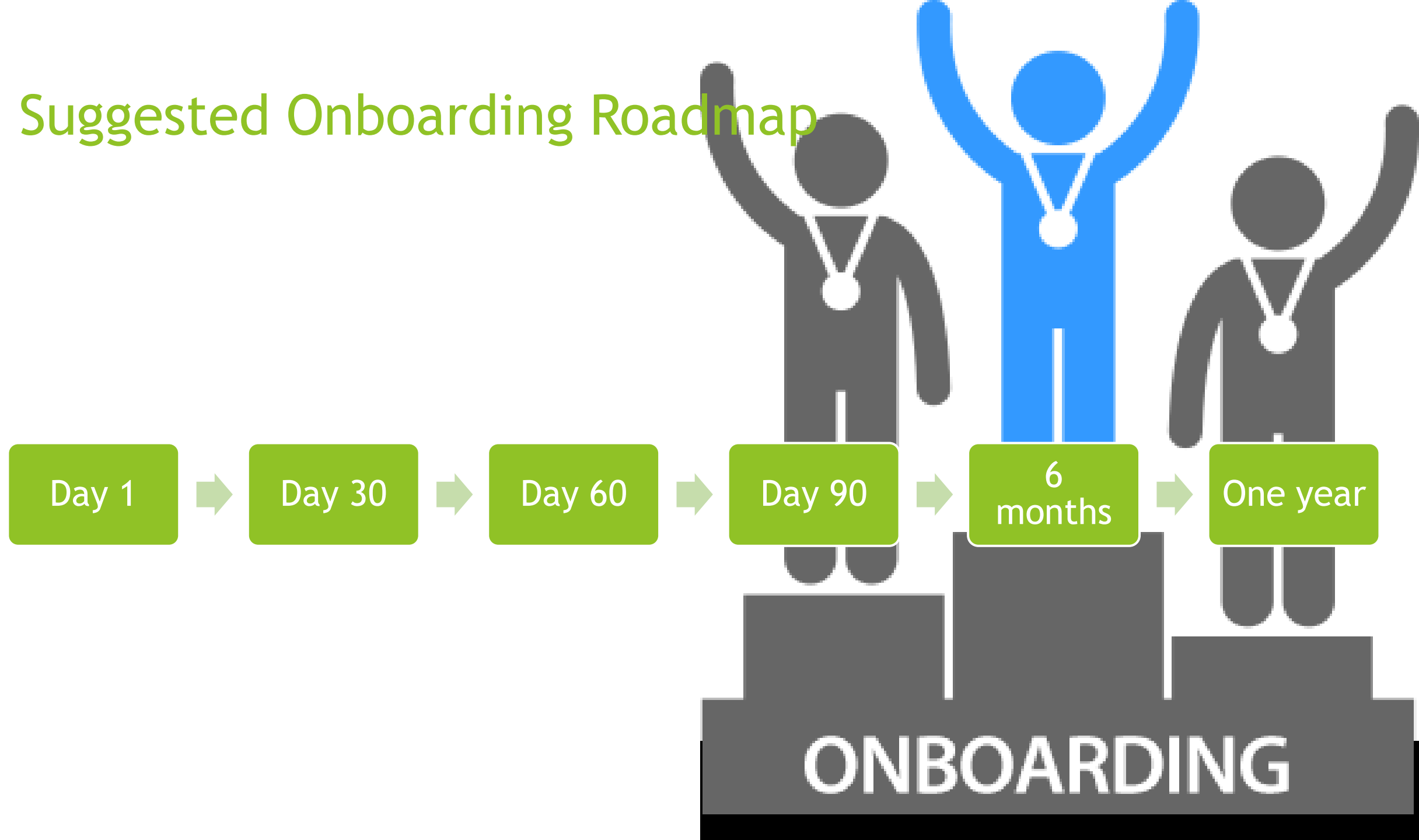
Day 30

Day 60

Day 90



# Suggested Onboarding Roadmap





Who should receive role-specific onboarding?

# Role-Specific Onboarding is for...

## New Employees

- ▶ New to the industry
- ▶ Have worked in other countries
- ▶ Part of their career paths
- ▶ Have had different positions in the past

## New to Role Employees

- ▶ Promotions
- ▶ Demotions
- ▶ Lateral moves
- ▶ Relocations
- ▶ Have background in comparable roles elsewhere

# Benefits of Role-Specific Onboarding

# Business Benefits

- ▶ Stronger employee-supervisor alignment
- ▶ Stronger employee-culture fit
- ▶ Competitive advantage
- ▶ Higher productivity and engagement
- ▶ Compelling company branding
- ▶ Consistency in information delivered
- ▶ Build trust
- ▶ Decreased turnover



# Manager Benefits

- ▶ Opportunity to define employee and business expectations
- ▶ Better communication with employees
- ▶ Easier to clarify what employees and managers will give and receive
- ▶ Time to explain task distribution
- ▶ Interactions to build trust





You're  
hired!

## Employee Benefits

- ▶ Feel welcomed and valued
- ▶ Less need for support in role
- ▶ Knowledge of where to obtain what they need
- ▶ Sense of self-efficacy
- ▶ Perception of career stability
- ▶ Greater intention to stay
- ▶ Growth in confidence in role and company



Now, what?

# Steps for Role-Specific Onboarding

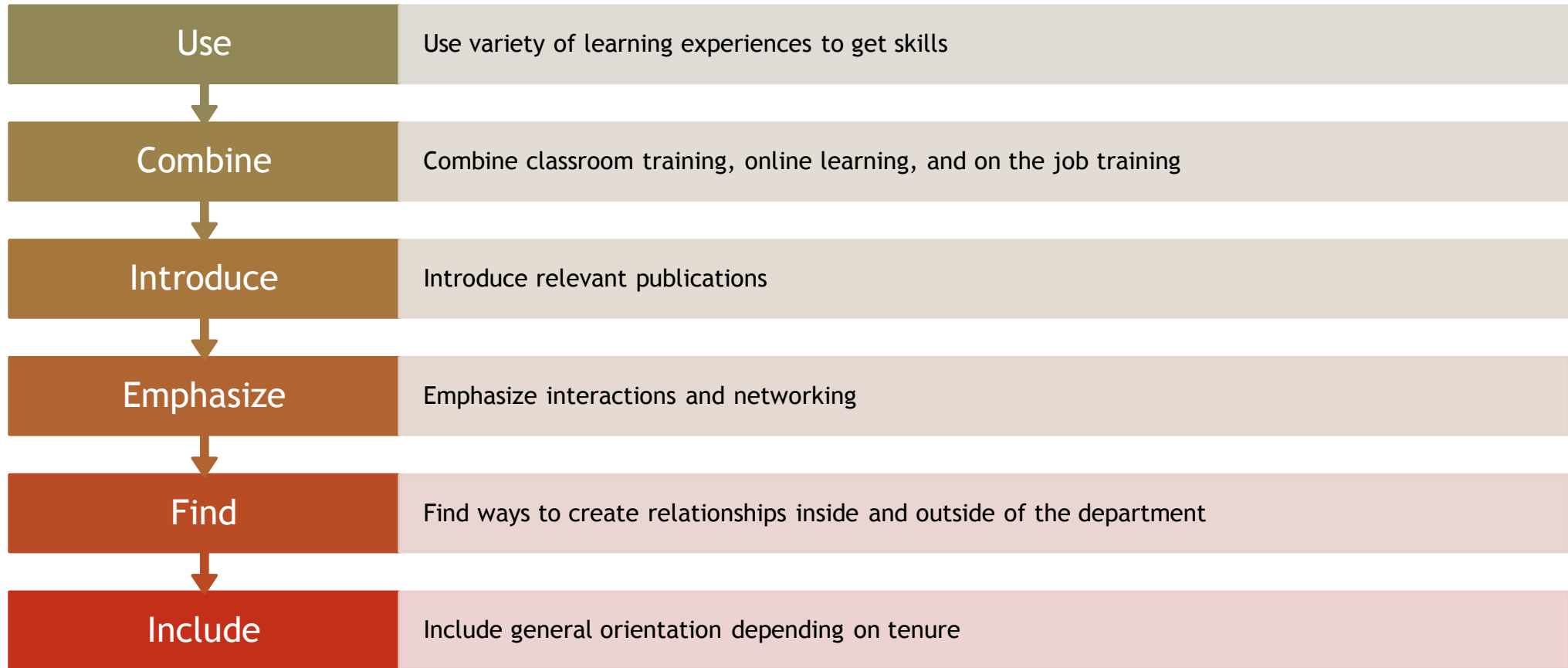
- ▶ Start with the job description
- ▶ Target differences in role based on prior experience if any
- ▶ Inquire about career paths for new role
- ▶ Customize business/industry information by level, role, and employee profile
- ▶ Create a plan in partnership with Learning and Development
- ▶ Assign a buddy or mentor
- ▶ Review the plan with the employee
- ▶ Set the context of the company and the department
- ▶ Align company branding and market differentiation
- ▶ Provide printed documents
- ▶ Monitor progress



How do we  
make it  
happen?



# Ways . . . for Role-Specific Onboarding



# Specifics for Managers



Pay attention to areas where they lack experience and offer opportunities to strengthen them



Redefine relationships and boundaries



Support other managers in transition role of new one



Address shifts in relationships as a result of promotions



Assign a mentor with three or more years of experience in role



Address existing issues related to the team prior to new manager's arrival

# Specifics for Executives

**Begin** Begin before they arrive at the company

**Handle** Handle confidentiality carefully

**Bring** Bring an external coach

**Create** Create individual development plans

# Specifics for Remote Employees

01

Introduce expectations about presence in office

02

Adapt logistics and content of program to their needs

03

Include in office events even if remotely

04

Optimize use of technology

# Do's and Don'ts of Role-Specific Onboarding

## Do's

- ▶ Create a welcoming environment
- ▶ Clarify expectations
- ▶ Make it real with examples
- ▶ Describe what the typical day looks like
- ▶ Explain uniqueness of department
- ▶ Give constant feedback and coaching

## Don'ts

- ▶ Assume that one-size-fits-most
- ▶ Overlook importance of other roles
- ▶ Create plans in isolation
- ▶ Expect stakeholders to be ready for change in role
- ▶ Omit general business goals and plans
- ▶ Underestimate the importance of diversity

Why don't they do it more?



# Potential Obstacles and Solutions

## Obstacles

- ▶ Details about logistics
- ▶ Unexpected events
- ▶ Avoid information overload
- ▶ Routine and repetition

## Solutions

- ▶ Review logistics before starting
- ▶ Anticipate and have “Plan B”
- ▶ Spread content over time
- ▶ Use a variety of activities to maintain interest



Your Questions

# Final Thoughts

**“Investing in onboarding is investing in employee success.”**

Thank you



Let's Onboard . . .

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