

# Onboard (ding) MATTERS



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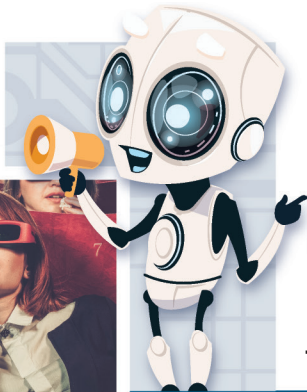
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# Onboarding MATTERS



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Turnover happens when we don't treat onboarding as a journey.





## MESSAGE FROM *Greg*

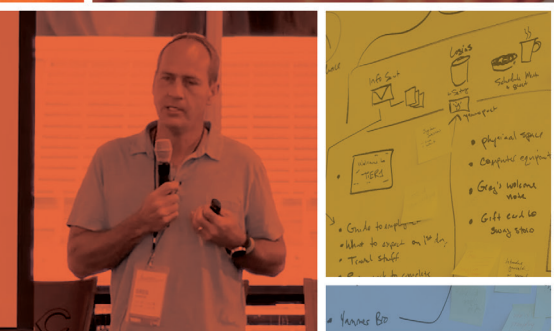
A mentor of mine who spent his career leading HR organizations once told me that "the first day is the hardest day, the first week is the hardest week, the first month is the hardest month, and the first year is the hardest year." New beginnings are difficult. They're also expensive. The time it takes to get someone from anxious new hire to fully proficient engaged performer is a big investment. One study says it takes on average eight months, and yet one in four new hires will leave before six months.

Clearly onboarding matters. Done right, onboarding goes far beyond the first day or first week orientation that many organizations define it as. At minimum, effective onboarding creates meaningful, engaging first experiences for that customer we call an employee, accelerating their time to proficiency and untapping the potential they were hired for in the first place.

But when embraced strategically, building a compelling onboarding program can be a catalyst for transformation. Building effective onboarding requires leaders to see the organization as a series of systems: roles, responsibilities, and processes. It challenges us to consider the employee experience, not just the content we need to cover. And it causes us to look at how things really work, and often to fix, clarify, streamline, or improve the things that don't.

We hope this print issue of Onboarding Matters sparks ideas for you on how to advance the dialogue around onboarding within your organization. We look forward to hearing your thoughts, ideas, and reactions to this issue.

*Greg Houser*





# REDEFINING ONBOARDING

BY DUSTIN SHELL



# UP TO 20% OF EMPLOYEE TURNOVER HAPPENS IN THE FIRST 45 DAYS<sup>i</sup>

and 34 percent occurs in their first year on the job.<sup>ii</sup> Other factors may come into play, but we believe turnover happens when we don't treat onboarding as a journey—one that starts before sending the offer letter and ends when the person is performing the role independently and confidently.

Onboarding typically has a narrow definition: orienting new hires to the company and their role. In some circles, it simply means a new hire's first day or week on the job. Yet, when you think about the impact onboarding can have on organizations—growth, people development, scalability, quality, customer and employee experience—a much larger picture starts to come into focus. It's not enough to think of it as a single day or week; depending on the role, the onboarding journey could take months or even years.

It's also an emotional journey. People leave organizations when they feel disconnected, overwhelmed, frustrated, or undervalued. Onboarding should help people feel *confident* in their new role as well as competent. Yet, the typical onboarding approach fills people up with everything they need to know or do before being sent to do their job without supporting that emotional journey.

## HOW ONBOARDING TRANSFORMS ORGANIZATIONS.

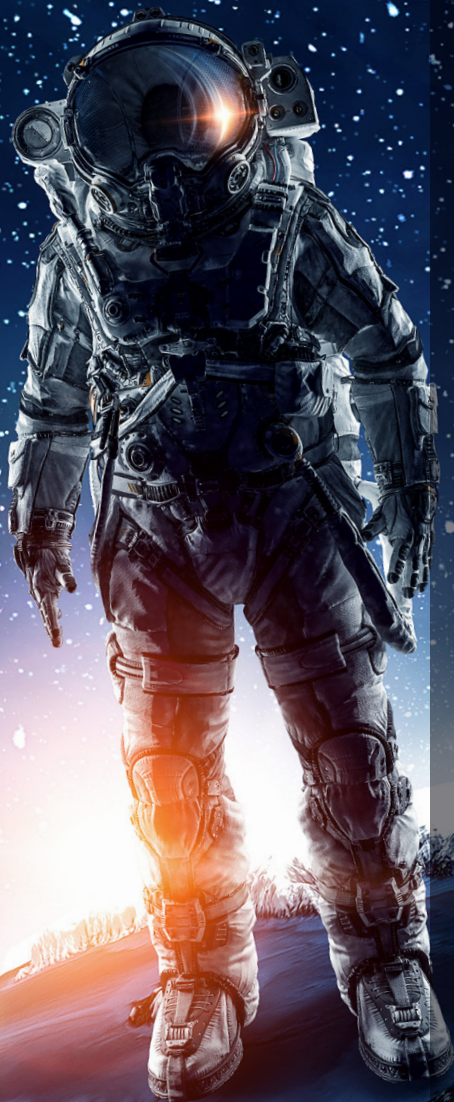
**Onboarding has applications that organizations may not typically recognize—like ensuring knowledge is retained and passed on.** Baby boomers will continue to retire over the coming years (whether it's in a burst or it happens in gradual waves).<sup>iii</sup> How can we capture and share their knowledge across generations? By building an onboarding experience that systematically trains people on the roles, mindsets, and processes that currently live in the heads of your most experienced employees.

**Onboarding isn't just for new hires.** Your people are always in a state of mastering their current role and taking on new ones, which is why onboarding can apply to role transitions and advancement, too. (Depending on the organization, it can be called inboarding, role transition, or even promotion.) It's incredible how agile an organization can be when people have the control and autonomy in their career development to navigate and explore new roles.

**Another onboarding application is scalability.** Many organizations wrestle with how to scale their business, especially if there aren't enough good managers or their managers are overworked. Onboarding enables us to capture and share the "best of the best" of a role to empower others to own their development, which eases the burden on overworked managers and puts more emphasis on the individual.

**Onboarding is also a great organizational alignment tool.** The rise of complex HR systems has reduced the need for HR staff; learning and development roles are shifting to be content curators and consultants. Onboarding unlocks the real value of these functions by allowing us to systematize the people side of business. It becomes a thriving system that multiple people own, buy into, and impact instead of relying on one person to work.

Let's take a look at three factors that can help redefine onboarding at your organization. —————>



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OF EMPLOYEE  
TURNOVER  
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---

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OCCURS IN THEIR  
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ON THE JOB.

## 01. CONSISTENT BRAND EXPERIENCE.

When organizations are small, they focus on getting their product or service right (and they should!). Business success is directly tied to creating a consistent brand experience for customers. That brand experience builds customer loyalty and trust, which generates demand and growth.

The same is true about the employee experience. As an organization grows, their ability to deliver an incredible customer experience is directly tied to investment made in creating and upholding an equally powerful employee experience. The result? Engaged and loyal employees that you can trust to uphold your brand experience because they believe in what they're doing and feel like a valued part of it.

Here's an example. I love taking my kids to Chick-fil-A for many reasons, but one stands out consistently: everyone, including the person in the cow suit, gives me and my girls 100 percent every time. I can count on them to be fun, friendly, and extra attentive (especially if I'm there as a solo parent). They don't just do the job; they create an incredible brand experience because they have an incredible employee experience. (Would that person in the cow suit be half as friendly to my kids if they felt like Chick-fil-A wasn't living up to their end of the bargain? I doubt it.)

Want to move the needle on your employee experience and create a more consistent brand experience for your customers? Onboarding isn't just a place to start, it's *the* place to start.

## 02. SPEED TO COMPETENCY.

Too often, organizations approach onboarding as a vehicle for delivering training content. They develop three to four weeks of training and hope that, by the end of Week 4, the new hire is ready to work. But it's misleading to think that time in training actually leads to competence. As a metric for onboarding, speed to competency is commonly used to show the value of onboarding. It's hard to measure, but it's one of the biggest business cases for investing in more effective onboarding.

What does it actually take to perform competently in a role? Here's how we approach it: No one learns everything about the role at once, so we recommend spreading out role development over a period of time (based on the complexity of the role). Ideally, we give the new hire time to practice, talk about the experience with someone, and reflect.

Going through these intentional steps helps people build competence. It's not about adding more time or content; it's about designing an experience that helps someone develop and grow within a role. It includes providing strong performance support tools and creating personal networks early on. That approach takes more time, but it also leads to the desired business results that you're looking for.

Be sure to partner with operations, technology, and managers to understand what it takes to be successful in the role. HR and learning functions should act as experiential learning consultants for the business units to help them document the keys to be successful in a role. Defining preferred practices will help the organization scale what the best performers are doing already.

### 03. EMPLOYEE ENGAGEMENT.

When an organization starts wrestling with their onboarding, it quickly turns into a conversation about the ultimate goal of onboarding. They start asking questions like:

- What's the desired state for this new person?
- Are we giving them opportunities to grow into their careers and personally?
- What do our employees need to be successful?
- How do we get this person thriving at this company?

In other words, a conversation about redesigning the onboarding experience becomes a launching pad to solve organizational challenges related to retention and employee experience across the board. When we engage key stakeholders in the process of reimagining the desired state and addressing the challenges of getting there, they not only create more effective solutions, they also feel ownership and energy around the change.

#### INDIVIDUAL TEAM MEMBERS

Feel more engaged as they reap the benefits of an experience that better connects them to people, their work, and the organization they work for.

#### TEAMS

Feel more involved and valued as they're invited to solve organizational challenges and align on the preferred practices of what they do every day.

#### MANAGERS

Feel more engaged as the organization invests in their development or empowers them to prioritize the time to develop their team.

#### EXECUTIVE LEADERS

Become more engaged in the process as they see the benefits of replicating what has worked to get them to where they are today.

As a result, the organization begins to see right turnover (that is, the employees who are a great fit for

the company stay, and the ones who aren't, don't) because the ecosystem is designed with the end in mind. **TI**



*about  
the author*

**Dustin Shell** is Director of Innovation at TiER1. He loves people, learning, and technology...in that order. He is passionate about combining his expertise to help people do their best work and fulfill their personal and collective potential. When Dustin isn't designing innovative solutions, he enjoys creating music, consuming a TON of books, and spending time with his wife and daughters.

# THE NEW DEFINITION OF ONBOARDING



**It's not just for new hires** because people are always taking on new roles and responsibilities. We're never done onboarding!



**Onboarding is a challenging emotional journey** that requires us to advocate for the employee experience.



**It's an organizational alignment tool,** impacting the whole enterprise.



**It has the power to create loyal employees** who create loyal customers.

<sup>1</sup>Georgetown University School of Business, 2016 <sup>2</sup>Work Institute, 2017 <sup>3</sup>Gallup, 2014

# GET REAL

Draft your **employee value proposition** with candor, transparency, and raw truth.

by **Laura Hoppa**



## *about the author*

**Laura Hoppa** is a Principal Consultant at TiER1. She's known for her precise word choice, well-turned phrases, and playful puns. With over 20 years of communications and marketing experience, Laura has helped organizations discuss topics that are complicated, important, insightful, celebratory, shocking, and fun.

## Filters can be tempting, but **YOU GOTTA DO YOU.**

In a world of high-gloss marketing, HR departments are beginning to realize that rosy-picture recruiting materials may harm as much as they help. Because too often, our enthusiastic, talent-attraction “spin” sets people up for disappointment. Employment is messy and organizations are imperfect. So once people sign on, it can be pretty tough to live up to our own hype.

Sure, we engage in this self-promotion to attract more applicants. But, don't we more precisely want to find the right applicants? We're all looking for those rare people with aligned interests, strengths, and skills who are going to invest in our mission, engage in our organization, and contribute to our success for the long term. We want them to be uniquely suited to our dynamics and love our work, despite our crazy challenges or quirky environment. We're hoping for performers who get so excited about our organization's potential, they sign on despite our flaws, even embracing the idea of being part of the solution. Those people aren't easy to identify, much less onboard successfully, when we sweep our challenges under the rug. Instead, we need to get real. And the best way to start is with a true and transparent employee value proposition, or EVP.

While the idea may feel a bit uncomfortable—even scary—the results can be amazing. Here are four steps for activating an EVP that will identify and retain the right workforce for you.







## 1. MOVE BEYOND THE NUMBERS GAME.

First, you've got to get comfortable with the idea that attracting fewer people is OK—even desirable. That's the cost of pursuing the right people. Because when it comes to employment, you're seeking a good fit. That takes an acknowledgement that this place isn't for everyone. So instead of selling your sizzle, you've got to own up to your reality. Not everyone will be drawn to it, but the right people will be.

## 2. CREATE AN "OPT-IN" DYNAMIC.

A great EVP details those generally unwritten rules between your organization and your employees; it makes explicit the balanced value-exchange you're both entering into. It should be written as a give-get statement that lays out for people, "When you give us X, you'll get Y." Great EVPs describe the organization's expectations for employees, while listing both the incredible aspects of the workplace as well as its challenges.

Crafting an authentic EVP means giving your applicants the chance to opt in, eyes wide open, to your realities and your obstacles, so that when things get tough, they are invested, engaged, and committed. And whew! That takes honesty. Transparency. Clarity. (Nobody said this would be easy.) But striving for amazing, long-term employee relationships is worth it.

## 3. USE YOUR EVP AS AN ONBOARDING AND COACHING TOOL.

When an employee joins the organization, you're basically striking a bargain together. And for the rest of their employment life cycle, that bargain gets subconsciously assessed by both sides. Is the employee still adding enough value? Is my organization still offering me

meaningful work and fair pay? Is this role still a good outlet for my talents and passions? The problem is, without a frank and truthful EVP, our employees don't always see the bargain the same way we do.

So, imagine if your managers used your honest, forthright EVP for coaching conversations that begin during onboarding and never stop. This tool would help them regularly give context to your culture and your expectations, allowing for healthy performance discussions outside of formal review cycles. It would set the stage for your new hires to quickly align to your reality and establish successful habits.

With this tool, managers can simply ask, "Where do you see yourself living up to this statement and where do you have room to grow? How about the organization—are we supporting you as described?" It's an effective way to get ahead of problems, prevent resentment, and decrease unwanted turnover. On the other hand, it also hastens the right turnover by revealing early on when a new hire isn't going to be a good fit. With continued use, your EVP can be the catalyst that builds highly engaged and powerfully productive teams.

## 4. CONTINUALLY HOLD IT UP AS AN ORGANIZATIONAL MIRROR.

A well-crafted EVP makes a promise to employees, and that shouldn't be taken lightly. Use it as a touchstone—a reference point for leadership to consider whenever setting organizational direction and making operational decisions. Be sure that your strategy never flies in the face of your EVP. The ability to continually live up to these words is the key to your effectiveness.

OK, ready to take this on? When you write your EVP with honesty and live it with intention, your performers will return your sincerity with their trust, engagement, retention, and passion. It just takes the courage to get real.

T1

# What Is Preboarding and Why Does It Matter?

by Jeremy Goebel

Every organization wants increased employee engagement. After all, it's linked to everything from increased productivity and profitability to stronger talent retention. Yet often we don't start thinking about employee engagement until after someone starts working at the organization.

Enter preboarding! (And no, we don't mean airplanes...)

Preboarding starts the moment someone accepts a job offer and lasts until they walk through the door on their first day. It's a crucial step in the onboarding journey that can engage the hearts and minds of new hires *before* their first day on the job.

## *Why preboarding?*

Put yourself in the shoes of a new hire. Switching jobs is a major life change that provokes a wide range of emotions—from anxiety and stress to excitement and hope. Preboarding is your chance to address these emotions head-on. And given that one out of five new hires will quit their job within the first 45 days, preboarding can tremendously impact turnover and attrition rates.<sup>1</sup>

## *about the author*



**Jeremy Goebel** is a Principal Learning Consultant at TIER1. He's passionate about developing leaders, transforming cultures, and having lots of fun along the way. Jeremy enjoys crafting learning experiences that both engage and inspire participants, using empathy to create relevant learning solutions that provoke meaningful and lasting change.



## What does preboarding consist of?

1

*Continuing the story.*

Some organizations overpromise during the recruiting phase and underdeliver during preboarding, leaving them with an uphill battle to engage new hires during orientation. Don't do that!

Think about your company's employee value proposition (EVP). (Read more about

crafting an authentic EVP on p. 6.) If the new hire accepted the job offer because the EVP really resonated with their values and career goals, then make sure you're reinforcing that EVP—in word and in deed—before their first day. Help them to see themselves fitting in right out of the gate!

Also, consider closing the loop on whatever was asked of new hires during the hiring process. Often, we ask new hires to take some sort of personality or skills assessment during recruiting. Preboarding is a chance to follow up with the individual about their results and how they're a great fit.

2

*Help them feel the love.*

Ok, love may be strong, but preboarding is a critical time you can use to begin making the new hire feel connected. Managers play a key role here. They can achieve this during preboarding with a simple call, getting to know the new hire and answering their questions. This enables managers to make meaningful introductions to the team before the new hire starts, which helps them feel like

they belong when they arrive (and everybody—from the front-line sales clerk to the C-suite executive—wants to feel like they belong). Consider having an onboarding buddy or peer reach out to the new hire as well; just be careful not to overwhelm them.

How can you continue the story and ensure they're feeling even more

connected? Talk to them about your company's culture, values, and history, and why they matter to you. But don't stop there: Talk to the new hire about how their unique mix of attributes and strengths will be a great fit for the organization. Encourage them to think about how they may activate the values in new and fresh ways. Create a brand ambassador before their first day! Speaking of that all-important first day...

3

*Equip them for Day 1.*

If you really want to show them some love, prepare them for the next phase of onboarding: Day 1 orientation.

Be very specific if there's something that new hires need to do before their first day. Where possible, provide a checklist of things to bring and things to know ahead of time. Should they bring special identification? Where should they park and where should they report? What's on their agenda for the first day? All new hires want to make a good impression—and that's hard to do when you don't know where to go, feel unprepared, or can't move forward with onboarding because your passport is at home.

In some cases, new hires can preview some of the people and resources that will be at their disposal. This could be a simple guide that communicates the protocol, policies, and cultural nuances that aren't apparent until you've been around a while—things like "People tend to eat at their desks," or "We exclusively use Google Drive." Or you could build an immersive web portal that allows them to preview people, spaces, processes, tools, and more.

Regardless of the method, providing resources that help answer their questions before Day 1 will alleviate their fears and anxieties. It also opens up what

orientation can be, allowing your people (new and established) to spend more time making warm, personal connections.

Oh, and make sure your organization is ready for their first day as well. You'll want new employees to feel valued and appreciated when they show up, not like an afterthought wedged into the five free minutes of someone's day. Every little thing matters, so think through things like their equipment, space setup, and a thoughtful gift or note from the team.

When investing in onboarding, don't forget about preboarding. It's a short but critical time that can make a big difference in helping your people get ready to soar. **T1**

# THE ENCHANTING POWER OF STORIES

by Molly Winter



**A good story can capture our hearts and minds—so why is storytelling often overlooked as a tool for engagement?**

In 2016, I started a new job...for the fifth time in eight years.

I'm a millennial, so this personal statistic may not surprise you. Studies show that over 90 percent of millennials expect to leave their current job in less than three years.<sup>1</sup> That means that of the 10 millennials you work with today, only one plans to stick around past 2020.

So why do millennials leave? Because they crave meaning in their work. Only 20 percent of millennials are happy working in a place without a set mission.<sup>2</sup> Most companies have a mission statement, but that doesn't mean they're clearly communicating the organization's story—the mission, culture, values, and people.

# ACTIVATING THE POWER OF STORIES.

As organizations grapple with high turnover, onboarding represents an opportunity to increase engagement early on and create meaning for new hires (millennials or otherwise). Crafting a meaningful onboarding experience includes sharing purpose-driven stories that cultivate a sense of pride and responsibility. This can help individuals create and find purpose in their work, something that millennials rate even more important than a paycheck.<sup>iii</sup>

Storytelling is one of the richest and oldest forms of communication. Since our earliest history, humans have crafted, performed, and listened to stories that helped us create meaning out of our experiences. Through storytelling, we share ideas and perspectives, learn about ourselves and others, and become a part of something bigger.

Stories can be used in onboarding to more memorably communicate facts (complex processes, structures,

and internal context), while inviting people into the organization's culture and vision. Here's how:

## Empowering imagination.

Stories allow us to step outside ourselves to consider new possibilities and empathize with others. You can use storytelling to help new hires visualize their future at the organization and the new opportunities that await them. By connecting their future to the collective story of your organization and of other employees, you encourage them to engage with the organization before their first day.

## Promoting knowledge sharing.

During onboarding, employees are learning to adapt to new environments and ways of working. The behaviors and knowledge that they develop help establish the foundation that they'll need for success in their new roles. Stories are helpful to this process. Through storytelling, new hires receive information with useful context and emotionally connect to the knowledge being shared, which is a more memorable and effective way to learn.<sup>iv</sup>

# STORY-DRIVEN ONBOARDING.



When organizations purposefully share stories as part of onboarding, people are able to reflect on the onboarding experience, the organization, and their new roles in a meaningful way. They begin to connect their own experiences to the organization's story, inspiring action that can further support the organization's culture and growth. Ultimately, story-driven onboarding creates a sense of community that sets the foundation for new hires to have successful futures at the organization. **T1**

i *National Affairs*, 2016

ii *HR Times*, 2017

iii *Forbes*, 2014

iv *The Atlantic*, 2014

## about the author

**Molly Winter** is a Senior Change Consultant at TIER1 and is based in the Chicago area. She enjoys engaging diverse perspectives and experiences to deliver creative solutions. Molly spent six years working at nonprofit organizations in Washington, D.C., Chicago, and Germany, developing leadership training and multicultural programs for young adults and Jewish refugees.



# B O S T I N G

# Confidence

TO BUILD COMPETENCE

by Mike Dermody

## 3 ROLES TO INSTILL CONFIDENCE AND REDUCE ANXIETY DURING ONBOARDING.

When it comes to onboarding, we often look at things from a business perspective. We focus on building someone's competency to perform a role (and we'd prefer for them to be fully competent as quickly as possible).

However, we can't forget about how someone feels as they go through onboarding. Often, despite all the excitement of a new job or promotion, they're feeling anxious...and ignoring that

anxiety can severely impact the individual and the business.

Whether they're new to a company or role, there's a lot of newness for the individual performer—and that newness causes **anxiety**. There's so much going on and they often lack the confidence and the competence to know what to do. This is especially true for new hires, but you see it also with folks who are transitioning to a new department or more specialized role.

For example, you need someone to know how to safely use a machine. It's tempting to create a 30-minute eLearning module that focuses purely on building their competence. "Do this, then do this." That's taking a business-centric view of onboarding to the role.

But, if we look at everything from the individual's perspective, we start to see where anxiety might occur. This is a really big, scary machine that makes a lot of

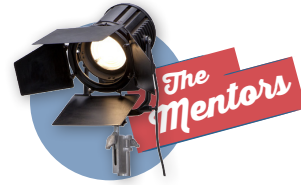
noise. I've never worked in this environment before. If I mess up, it will cost the company thousands of dollars. How quickly did everyone else master this machine? Am I normal? Am I on track?

All these worries can cause anxiety if they're not addressed during onboarding from an employee-centric view. And when we don't address anxiety, it can quickly snowball into business challenges such as high turnover, low engagement, or poor performance.<sup>1</sup>

<sup>1</sup>"How Anxiety Hurts Workplace Productivity," The Business Journals, October 16, 2017.

## KEY PLAYERS FOR BOOSTING CONFIDENCE.

Onboarding should be developed with the individual in mind, lowering anxiety and boosting confidence to empower people to be fully competent in their roles. We've found that three roles can significantly boost someone's confidence as they go through onboarding. Through these roles, you'll be able to build a network of support around the individual that coaches, mentors, encourages, and gives a sense of belonging...all while helping them feel more confident, more secure, and less anxious.



The mentor should be guiding the new hire through the learning experiences starting Day 1. They coach the individual and monitor the new hire's progress through the *learning program*, as opposed to monitoring their progress on the job.

Mentors also make sure the individual has ample opportunity to practice what they learn, helping them build confidence in their capabilities. To have the best mentor/mentee experience, the mentor should value the learning experience within onboarding the most, rather than job productivity.

One simple way that mentors help reduce anxiety and build confidence during onboarding is to check in with their mentees. Some questions mentors can ask include:

- How are you doing?
- Are you following along okay?
- What questions might you have?
- What concerns do you have?
- What things are causing you stress right now?



The manager will sometimes act as a mentor, but their primary responsibility is to make sure that the individual has what they need to perform on the job. By focusing on job productivity and performance in the role, managers are uniquely positioned to help people unleash their potential and actually thrive in their new roles. Managers typically focus on whether the new hire is building competency to perform according to the expectations for their specific role.

Managers can help boost confidence by asking their new employee:

- How is the work going?
- Do you feel like you're developing the skills you need to succeed?
- Do you have enough opportunities to practice those skills?
- Where do you think you're doing well?
- Where do you feel like you need help or additional practice?



In large organizations, most people go through onboarding with several peers or a cohort. This provides a safety net that builds confidence, since new hires are going through the same experiences together. Everyone interprets the information that they learn in a unique way, so it helps tremendously to get multiple perspectives as learning happens.

Peers provide new hires with the chance to reflect on new ideas as they go through onboarding. Make sure you provide ample time for open discussion throughout their experience as they learn, practice, and grow together.



### *about the author*

**Mike Dermody** is a Principal Learning Consultant at TiER1. He applies deep understanding of learning and cognition to individual and organizational application through employee experience, providing strategic consulting with senior executives on talent development and performance improvement strategies. Mike is also a semi-professional musician playing in a variety of venues and events around Cincinnati.

When we think about involving these roles in an individual's onboarding experience, of course we want to leverage their expertise and abilities. Yet, given the business implications of anxiety in onboarding, boosting someone's confidence is just as important as building their competency. (And in some cases, it directly impacts how competent they truly are in the role.)

Shifting to employee-centric onboarding experiences will boost confidence and address the inherent anxiety that people feel in new situations. Using this network of support—mentors, managers, and peers—will help your people feel more confident and secure in their roles. Ultimately, that leads to more productive, happy, and competent employees. **T1**



# ENGAGING TRAINING FOR A CAPTIVE AUDIENCE

CONTRARY TO POPULAR BELIEF, COMPLIANCE AND SYSTEMS TRAINING DOESN'T HAVE TO BE BORING.

by Mike Divine



## *about the author*

**Mike Divine** is a Principal Learning and Talent Development Consultant at TiER1. Mike has over 20 years of training and development experience as a facilitator, instructional designer, and consultant. He rocks at instructional design, curriculum design, competency development, and leadership development. Mike also runs a Games Club at his kids' elementary school.

### THE FIRST FEW WEEKS

of any new job or role is an exciting time: new people, new responsibilities, a new environment. Like with anything new, the shine fades away with time. Unfortunately, many organizations inadvertently make the shine wear off more quickly by requiring boring, uninspired training.

We can all agree it's important for people to get up to speed on their new responsibilities, including job tasks and ethical/compliance obligations. But many courses that teach these things are tedious to the point of causing physical

pain, as if someone thought they should be character-building exercises, not meaningful learning experiences.

The thing we often forget about onboarding is that we have a captive audience. They're excited to be there, but they also *have* to be there. They *have* to take various training courses to develop competency, from systems and compliance to benefits and organizational structure.

It's easy to be lazy with learning for a captive audience: list all the requirements of a policy or regulation

and say your training job is done. But that approach only scratches the surface of what could be. What if no one was required to take your training course, but your goal was to get 100 percent adoption? How would that change the way you designed the experience of taking the course?

One of the keys to a meaningful onboarding experience is to help employees understand the "why" behind everything they're asked to do. To create engaging required training for a captive audience, we should answer the questions that they have as they go through the training.



## HOW

will my actions impact the end user or my colleagues?

By providing the "why," you'll help employees make a connection between their new role and the overall mission of the organization. Additionally, it makes the training more interesting and aids in retention of the new information.



## WHY

does this training matter?



## WHERE

does this fit into the overall ecosystem?

Ready to rethink your own compliance and systems training, but aren't sure what that looks like? Take a look at the following examples to get the wheels turning.



## WHAT

value does it provide to my role? What about the organization?





## ENGAGING COMPLIANCE TRAINING.

A large manufacturing company wanted to provide new employees with guidelines on how to engage in social media—not just in their official capacity as employees, but in their personal lives as well. As a high-profile company whose work had national security implications, it was important to make sure everyone had an understanding that social media posed special risks to the company’s reputation and, potentially, the country’s security. The company was particularly concerned about making sure the message got across to its new, young employees.

The boring way of approaching high-stakes compliance training would be to create a checklist of policies and implied threats. Instead, the company decided to develop a 15-minute eLearning course that challenged employees to think about how they use social media and the risks it could pose. In a highly interactive experience, learners were asked to:

- Reflect on how others might perceive “typical” social media posts.
- Consider detrimental effects on their reputation and that of the company posed by unprofessional social media posts.
- Review realistic scenarios and consider how they might best be solved or rethought.

The company found that, not only is it possible to create emotionally engaging compliance training, but that employees want to engage in it.

## ENGAGING SYSTEMS TRAINING.

A large financial services firm rolled out a new digital engagement platform for its most valued clients. The platform was going to change how clients engaged with a financial services firm, period—not just this company, but any financial services firm. Advisors, whether new to the role or experienced, needed systems training to know how to engage with clients in this new world.

Understanding that they needed to provide employees with the “why,” the firm decided to develop an interactive, branching eLearning course that centered around five client stories. Each story started with a foundation of the client’s financial life and how they would manage it through the new platform. Building from that foundation, the advisors then learned how to use the platform to provide a deeper level of service than they ever could before.

The firm wanted employees to understand the value of working for their clients, not just the value of making the right clicks in a software application. Tying procedural training to their mission, vision, values, and value proposition made for a more engaging experience for everyone.



**By providing greater meaning and context to training during onboarding, your captive audience will have a more engaging onboarding experience where they walk away with a greater understanding of who the organization is and how they impact the business. T1**



# Using Technology to Create a More Human Onboarding Experience

by Harrison Withers

**T**echnology surrounds us. Yet often, interacting with technology is a cold, transactional experience. What if we could use technology to enable interaction and enhance the human experience of onboarding?

Most organizations use technology as part of the onboarding experience. There are forms to fill out, eLearning to consume, and resources to be reviewed on the intranet. We use technology to deliver and store content.

But what's the story a new employee will tell about their experience? How does using technology help people perform better and be more productive faster?

In many cases, we have a bunch of content, but the content experience is organized like a scavenger hunt. We send new employees on a quest to find information, but at each stop we change the context for why they're there. Go to the LMS for this, go to the CRM for that, check the HR intranet page, etc. It isn't consistent, and worse, it dilutes what we're trying to achieve with onboarding. At the end of

the day, you may have checked off all the boxes, but the journey wasn't memorable and may have left the user feeling confused and frustrated.

And it's not enough to change the window dressing if you don't also address the underlying content and experience challenges. Otherwise all you have is a sleek but impractical interface that leaves employees feeling just as irritated. Once you've reimagined the onboarding experience and can tell the story from preboarding through the first weeks and months, it's time to use technology to help tell that story.

## A new context.

To shift our thinking on onboarding technology, we have to start looking at the context of the content we provide. Think of it as a personalized employee dashboard that's all about that new person, their mindset, and what they need to succeed within your company. This includes transactional tasks (e.g., paperwork), but also what they need to know about the company, the function, and role they were hired to perform.

Too often we place all the focus only on what we need new team members to learn or complete for compliance purposes. Yet when we focus on their needs and acclimating them to the company, their role, and the tremendous value they bring, we make them feel like they belong. Try reframing the context to be about how we want them to feel.

## How we want them to feel.



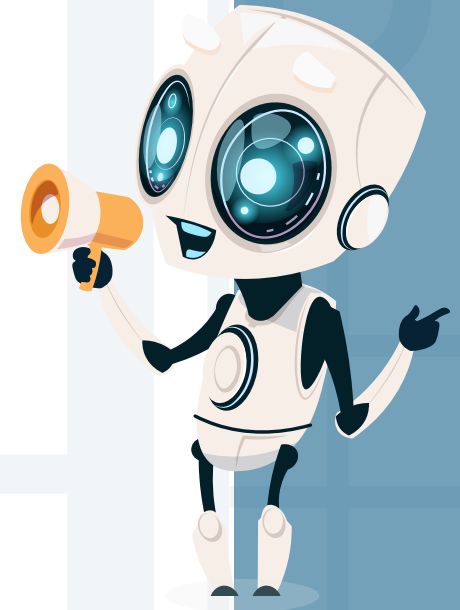
## Adding structure to an experience.

Once you have the context, you can then structure the knowledge and experiences you need them to have in the onboarding journey. Use the context to design the perfect first day and week that would be a great experience and story to tell. Design it so they know exactly what they're supposed to do and what's coming next. There should always be a logical connection between one experience and the next. It's not about making an interactive checklist; it's about imagining what your new hire is going through and trying to meet them where they are—their anxiety, their curiosity, and the significant things that happen to them along the way.

A good onboarding portal can enable these kinds of experiences in a systematic way. Authoring and sequencing activities; customized experiences for different roles or regions; beautifully designed interfaces that are easy to use and aligned with your brand; seamless integrations into other platforms; metrics that provide visibility into new hires' progress. This is all great stuff! But the onboarding portal isn't the experience itself, it just supports the experience.



*It's not about the technology, it's the experience.*



## *Infusing the human element.*

Think about the collection of experiences on your onboarding path. What are the most important and meaningful in the journey?

Now think about how the new employee experiences those things. Was it an eLearning module or a human exchange? Did they research a product on your intranet, or did they reach out to a coworker to ask them how they sell it? Think about ways you can incorporate human-based moments of meaning into the experience.

One of my favorite onboarding experience stories involves a client who distributed free reusable water bottles to all employees. They could have just placed the water bottle on the new hire's desk on the first day, but instead they decided to make getting the water bottle a learning experience. The onboarding portal told the new employee who to find, gave them a few personal questions to ask before they could pick up the bottle, and shared why the company valued reusable water bottles. A simple task became something personal and meaningful.

The technology wasn't the focus, but it prompted the action. It provided a framework and context around a human-centered event that became part of the overall experience.

The goal isn't necessarily to have the flashiest and fanciest onboarding portal; it's to design the best experience with the best usability for a new employee. Create something where the onboarding process is personalized, clear, easy, and intuitive. Make the technology irrelevant and the experience the star of the show.

Use technology to highlight meaningful human experiences and you'll be well on your way to making your onboarding a more effective and memorable journey that accelerates a new hire's time to competency. **T1**

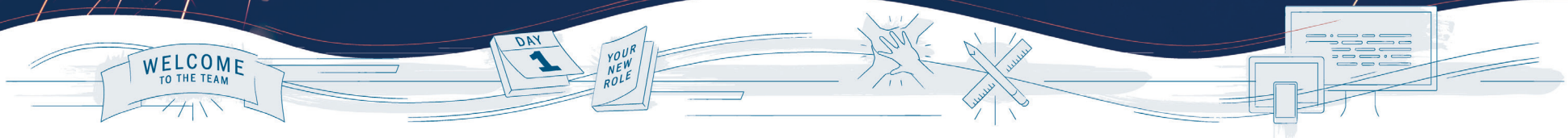


### *about the author*

**Harrison Withers** is a Principal Consultant at TIER1. He's passionate about performance improvement, employee engagement, and user-centered experiential learning design. Learning-focused portals, mobile, and SharePoint are just a few of the technologies in which he specializes. Harrison is also a published author of the book *Organization Horsepower* and builds cigar box guitars.

# Spark THE CONVERSATION

Feeling inspired to create an even better experience for your people? Here's a list of questions to spark your thinking for redefining the onboarding journey for your organization.



## How might we preboard new hires?

- How might we better meet our new hire's needs before their first day?  
How might we reduce their anxiety?  
Help them feel connected?  
Appease their curiosity?
- How might managers accelerate the integration of the new hire to the team?  
To the company?
- How might we reduce friction with technology and other logistical challenges?
- What partnerships do I need to strengthen to ensure we are ready for the new hire on their first day?

## How might we redefine orientation?

- How might we maximize the new hire's time together with people in the first day or week?
- How might we make compliance and legal needs more fun and relevant?
- How might we help new hires connect personally with our customer, mission, values, and culture?
- How can we better support managers to create incredible first days/weeks?
- How might technology enhance the experience for the new hire?

## How might we accelerate role competency?

- Who are the top performers in this role and how might I engage them to help replicate what's working about what they do and who they are?
- How might we better equip and empower managers to be coaches and leaders?
- How might onboarding be more experiential with less formal training?  
How might we promote people working side-by-side and maximize the learning that happens?
- How might technology empower the new person to drive the experience on their own?

## How might we sustain the onboarding journey?

- What measurements drive the right behaviors, activities, and priorities within our organization related to onboarding?
- What feedback loops do we need to stay aligned and identify areas for improvement?
- How might we unify the technology experience in one place?
- How can we make maintaining the onboarding experience more sustainable?
- How might technology enhance the experience for the new person?  
How might it reduce the logistical burden of onboarding new people?

EVERY YEAR,  
25% OF AMERICANS  
EXPERIENCE SOME  
TYPE OF CAREER  
TRANSITION.

Onboarding is crucial to acclimate employees to new roles faster—and it isn't just for new hires. Your employees who are changing roles, departments, and locations have a big impact on strategy, too!



## WHY *Onboarding* MATTERS

Onboarding could be the key to activating your company's strategy:



Reduced Time to  
Role Proficiency



Higher  
Retention



Improved Employee  
Performance



Higher  
Productivity



Greater Loyalty  
and Engagement

*Let's talk!*

[tier1performance.com/onboarding](https://tier1performance.com/onboarding)

*improving*  
**ORGANIZATIONS**  
*through the*

**PERFORMANCE**  
*of* **PEOPLE** *to* **BUILD**

**A BETTER**

*World*

## WHO IS TIER1?

Founded in 2002, TIER1 Performance Solutions is an employee-owned consulting firm that activates strategies through people. We bridge the gap between strategy formulation and its day-to-day implementation through an organization's most significant asset: people. We are passionate about consulting, designing, and building solutions that deliver meaningful, long-term success.

We've helped over 300 high-performing organizations including GE, P&G, NASA, Delta, Humana, Pier 1 Imports, SAP, AbbVie, Macy's, Carnival, McDonald's, and FedEx...to name a few.

We believe that the potential for any organization lies within its people. By unleashing the best of both, we will change the world.

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# STRATEGY ACTIVATION THROUGH *people*



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