

# On-Boarding: an investment in Your Team

By John Liacone, Bob Lindeman, and David Westman

A hand is shown holding a white rectangular sign with the text "Welcome Aboard!" written in a teal, cursive font. The sign is centered within a large, stylized circular graphic made of multiple concentric, overlapping white and teal lines. The background is a blurred image of a person in a dark suit.

*Welcome  
Aboard!*

This basic **orientation** process is critical to creating a good **first impression**. However, orientation is only the beginning of a comprehensive **on-boarding** plan.



Ten years ago the term “**on-boarding**” was not even a common expression. Today it is gaining acceptance as a common part of **HR vocabulary**, but it should be a mutually understood term by **employees and HR representatives**.

More importantly, it should be embraced by top management, especially for executive, management and professional level positions.

But what is on-boarding? It is simply a process to assist the transition of new employees into an organization. The objective of the process may vary somewhat depending on the organization. For professionals, managers and executives the objectives of on-boarding are typically to:

- Help make new employees feel welcome.
- Accelerate a new employee’s contribution and productivity.
- Reduce the risk of turnover of the new employee.
- Improve member or customer satisfaction.
- Align the new person’s role to both the short- and long-term needs of the organization.

Many non-profit organizations have a good orientation program. A solid orientation program is one part of a comprehensive on-boarding plan. The primary activities are to:

- Review and enroll the new hire in employee benefit programs.
- Train the new hire on phone and email systems.
- Workspace orientation.
- Provide needed supplies, tools, computer, phone, etc.
- Introduce the new hire to management and employees this person will be working with.

The orientation, while undertaken by many organizations, still falls short. It should include a goal of creating a great, thorough first impression. For example:

- Consideration of who welcomes the new hire at the door.
- Work site orientation: tour of facilities, introduction to colleagues, executives, team members, departments, breakroom site, etc.
- Workspace preparation: work area (cubicle or office), phone, computer, email, tools and supplies to do the job.
- In-depth orientation to the organization’s vision, mission, values and history.
- Explanation and enrollment into organization’s benefit programs.



This basic orientation process is critical to creating a good first impression. However, orientation is only the beginning of a comprehensive on-boarding plan. True on-boarding extends well beyond the first day: the entire first year of employment is an opportunity to educate the new hire and ensure that he or she has the resources and knowledge necessary to be a valuable, long-term team member.

**We believe that the following steps are important to ensuring a new hire's successful transition into the organization:**

- **External orientation: Focuses on key external relationships that the organization has or should have that are relevant to the new hire's position.**
  - o The external people, affiliated organizations and stakeholders with whom this person should meet will vary based upon the position, but here are some examples:
    - Key members
    - Leaders of regional, state, and/or local affiliates
    - Corporate partners and vendors
    - Advocacy partners
    - Key service providers (e.g., attorney, banker, auditor, insurance broker, technology partner)
- **Basic orientation (previously outlined).**
- **Becoming acquainted: Typically during the first 30 days (time frame may vary based on size and complexity of organization).**
  - o Reviewing role and responsibilities (revisiting the position description).
  - o Developing relationships with the new hire's boss.
    - Establishing check-ins for the first 90 days.
    - Developing a sense of communication preferences.
    - Reviewing expectations, priorities and initiation for first 30, 60 and 90 days and possibly 1 year.
- **Developing cross-functional orientation.**
  - o More in-depth meetings to familiarize the new hire with executives and key people from other departments, including their roles, needs and functions, as needed.
  - o One-on-one/small group explanations of managers' or executives' insights on the organization, its culture and relevant operating practices.
- **Work group orientation: Focuses on the department and the people with whom this person will most closely work.**
  - o Consider assigning a "buddy" from the new hire's group of peers who will be responsible for answering day-to-day questions and helping with all those "things" that slip through the cracks with many orientations. This buddy fulfills a temporary role, typically only 30-90 days, and is not her or his mentor. The buddy could be a peer or someone close to the new hire's organizational level.
  - o Organize one-on-one meetings between a new employee and those people with whom he or she will most closely work. The objectives of one-on-one meetings should be to impart more detailed and personal information than the introductory meetings. They may include the following:
    - Understanding each other's respective roles in the organization.
    - Understanding any specific expectations of the new person.



- **Organizational practices and procedures:**

- o Train or orient new hire on systems and processes that are critical to the organization and, more importantly, to this person's immediate and continuing successful performance.
- o Consider the following:
  - Walking through key processes and systems.
  - Going to any outside systems training provided by the organization's outside technology partner, either on specific applications this person should know or on the overall system.
  - Spending one half to one full day in each of the organization's key areas so that the new employee feels comfortable with resources, expectations and the roles of mentors.

- **Strategic, business plan and relevant document review (for executives): It is critical that one of the senior executives, if not the CEO or Executive Director, review the following or provide the following documents with a more in-depth discussion.**

- o Strategic plan, marketing plan and relevant business plans.
- o Any research studies or reports on the organization this person should be aware of.
- o Organizational chart.
- o Competitor information.
- o Annual budget, forecasts and projections.
- o Member surveys.

- **Goal setting and key initiatives: Knowing the organization should be the first priority since that knowledge lays the foundation for everything. Establishing goals and involving this person in heading up key initiatives is important.**

- o Discuss specific department or job-specific goals within the first 30 days – some of these may need to be negotiated.
- o Discuss specific major initiatives this person should help lead but do not overwhelm the person.
- o Link the goals to the person's incentive compensation program, as appropriate.



**Bottom line:**  
Review **expectations, priorities and key initiatives** for intervals of first 30, 60, 90 and 180 days and, finally, at 1 year.

#### On-Boarding Key Takeaways:

Maximizing an organization's investment in a new professional, manager or executive requires a well-thought-out on-boarding plan. The plan should be reviewed with the new person in the first day or two of starting employment. It should be finalized with input from the new person within the first 30 days and then regularly used as a check-in document and guide. When planned and executed effectively, an on-boarding program will pay great dividends to everyone.

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