BUILDING
STRATEGIC
CAPABILITIES

WWHR

Session Title: Onboarding:

"Did We Have You at Hello?"

DEPARTMENT OF DEFENSE
2009 WORLDWIDE HUMAN
RESOURCES CONFERENCE

July 2009

Panel Members

- Susan Hager, Moderator, CPMS Policy

- Jonathan Kappler, Associate Manager for Research, Partnership for Public Service (PPS)

- Kimberly Lane, Chief Learning Officer/Lean Six Sigma Greenbelt, Naval Facilities Engineering Command (NAVFAC)

- Joyce Cofield, Director, Recruitment, Diversity & Retention, Office of the Comptroller of the Currency (OCC)

Agenda

- Introduction

- Overview, research, Strategic Onboarding Model, Best Practices

- Lean Six Sigma Approach

- Retention Strategies

- Susan Hager, Moderator, CPMS

- Johathan Kappler, PPS

- Kimberly Lane, NAVFAC

- Joyce Cofield, OCC

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WWHR

What is Onboarding?

- Integrating and acculturating new employees into the organization and providing them with the tools, resources, and knowledge to become successful and productive

- From accepted offer to end of first year

Why is Onboarding important?

- Improves employee performance

- Increases employee engagement

- Improves employee retention, reduces turnover costs

- Accelerates time-to-productivity

Key Research Findings

- Inconsistent, transactional approach

- Not enough integration, accountability

- Inconsistent across groups and locations

- Limited use of technology

- Measurement focuses on short-term results

- Onboarding not part of retention strategy

Strategic Onboarding Model

PRINCIPLES

| **Align** to mission and vision | **Connect** to culture, strategic goals and priorities | **Integrate** across process owners | **Apply** to all employees |

ROLES

| + PROCESS OWNERS | + PROCESS CHAMPIONS | + EMPLOYEE |

PROCESS PHASES AND KEY ACTIVITIES

BEFORE FIRST DAY →	FIRST DAY/ ORIENTATION →	FIRST WEEK →	FIRST 90 DAYS →	FIRST YEAR →
• Extend personal welcome to employee • Communicate first day logistics to employee • Send paperwork in advance and/or online portal access • Prepare for employee	• Focus on sharing the mission and values • Incorporate senior leadership • Orient employee to organization and office norms • Introduce employee sponsor • Meet immediate requirements for employment	• Ensure direct managerial involvement • Set performance expectations and job scope • Assign meaningful work • Communicate resources or networks required for work	• Provide essential training • Monitor performance and provide feedback • Obtain feedback through new hire survey and other means	• Recognize positive employee contributions • Provide formal and informal feedback on performance • Create employee development plan

OUTCOMES

| High employee **job satisfaction** level | **Retention** of high-performing employees | Continued **employee engagement** and commitment | Faster time-to-**productivity** |

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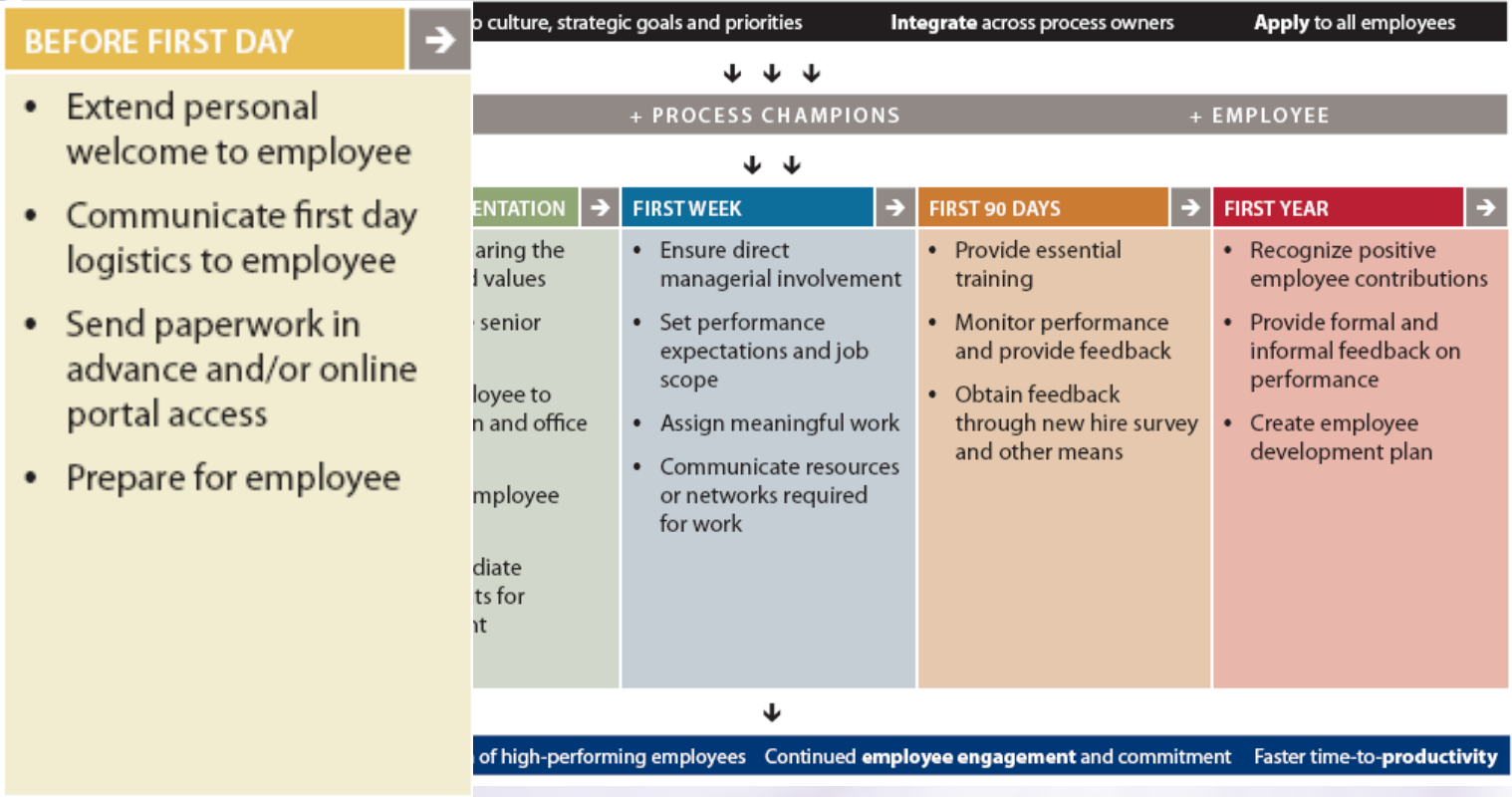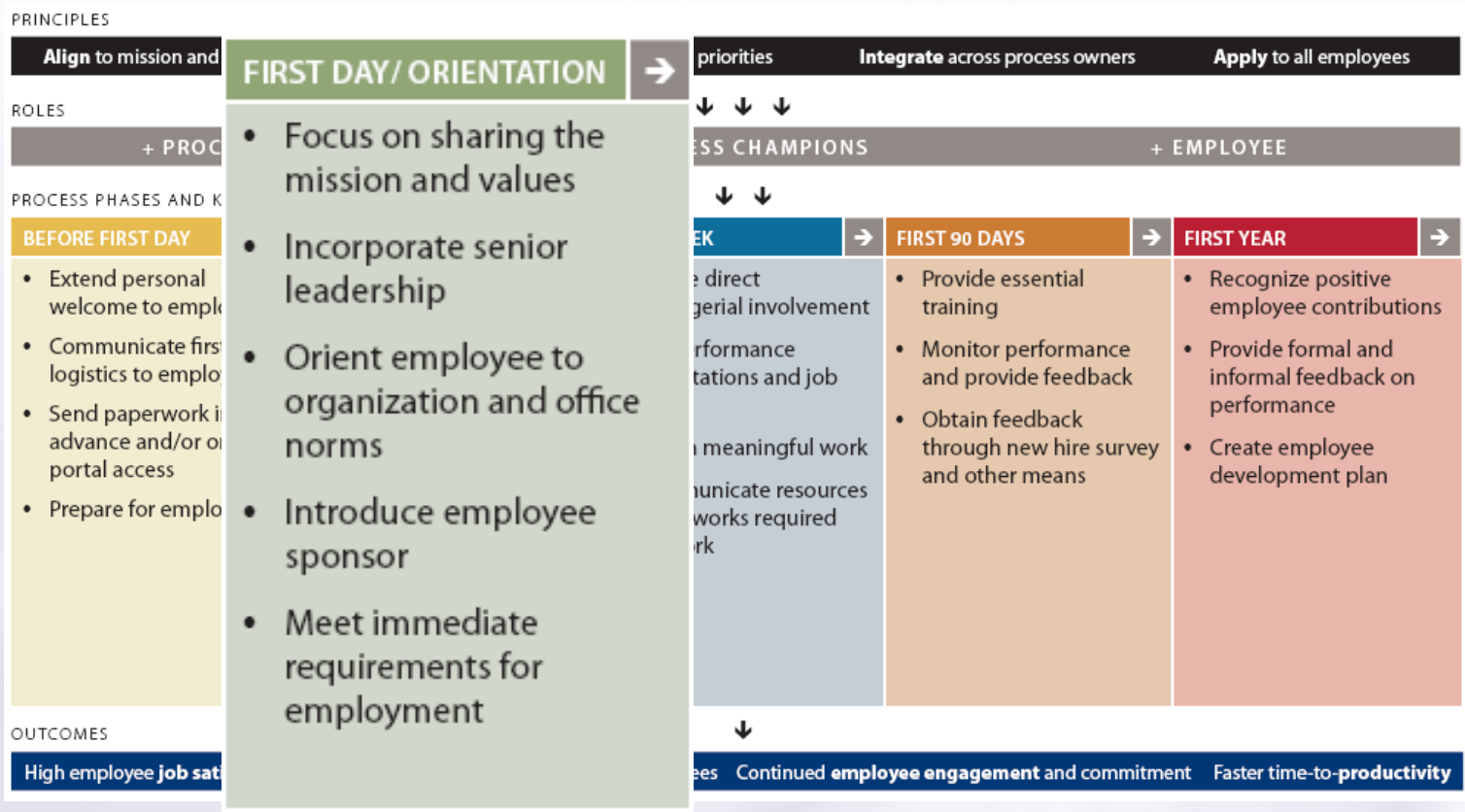| BEFORE FIRST DAY →	FIRST DAY/ ORIENTATION →	FIRST WEEK →	FIRST 90 DAYS →	FIRST YEAR →
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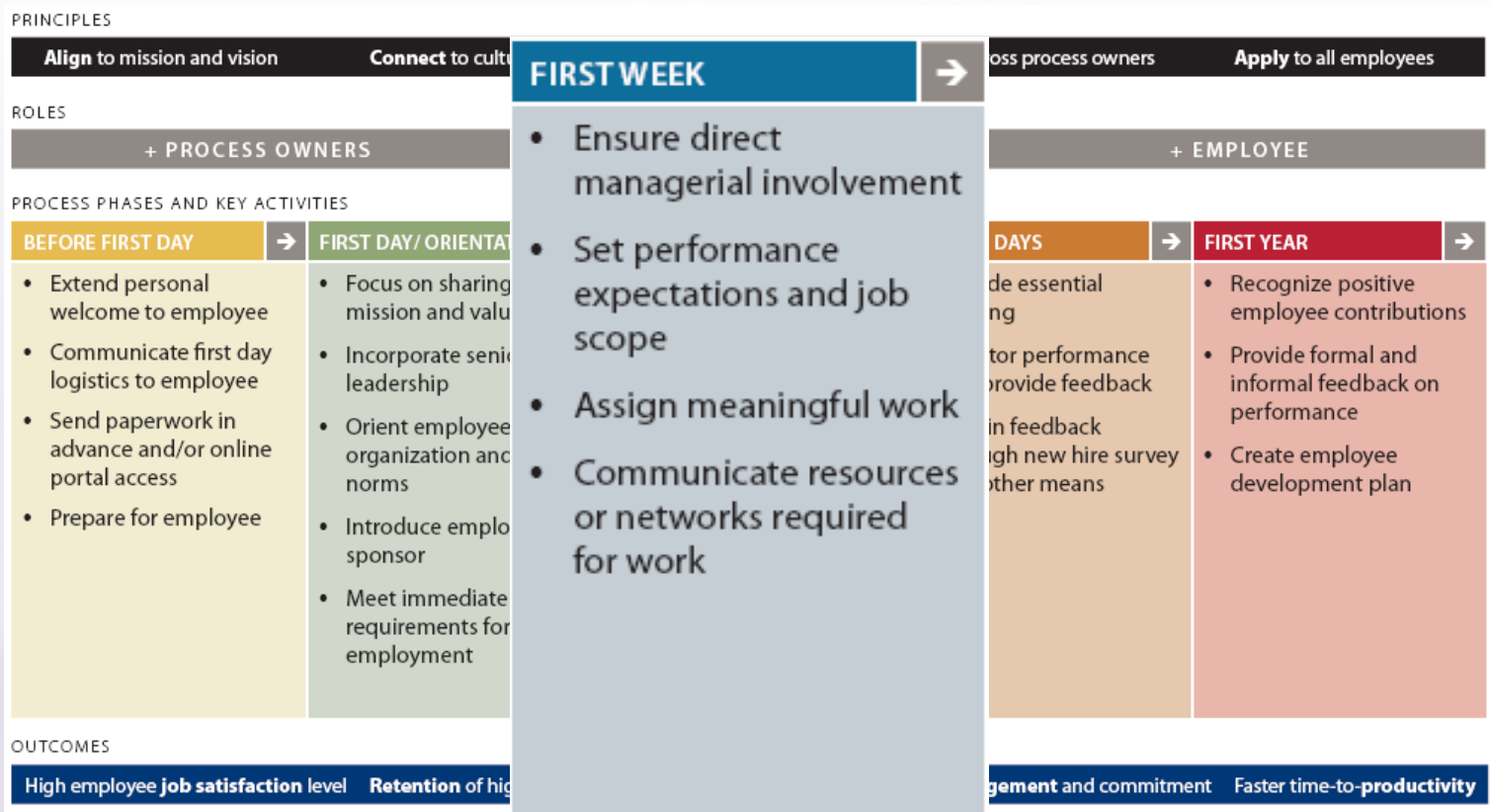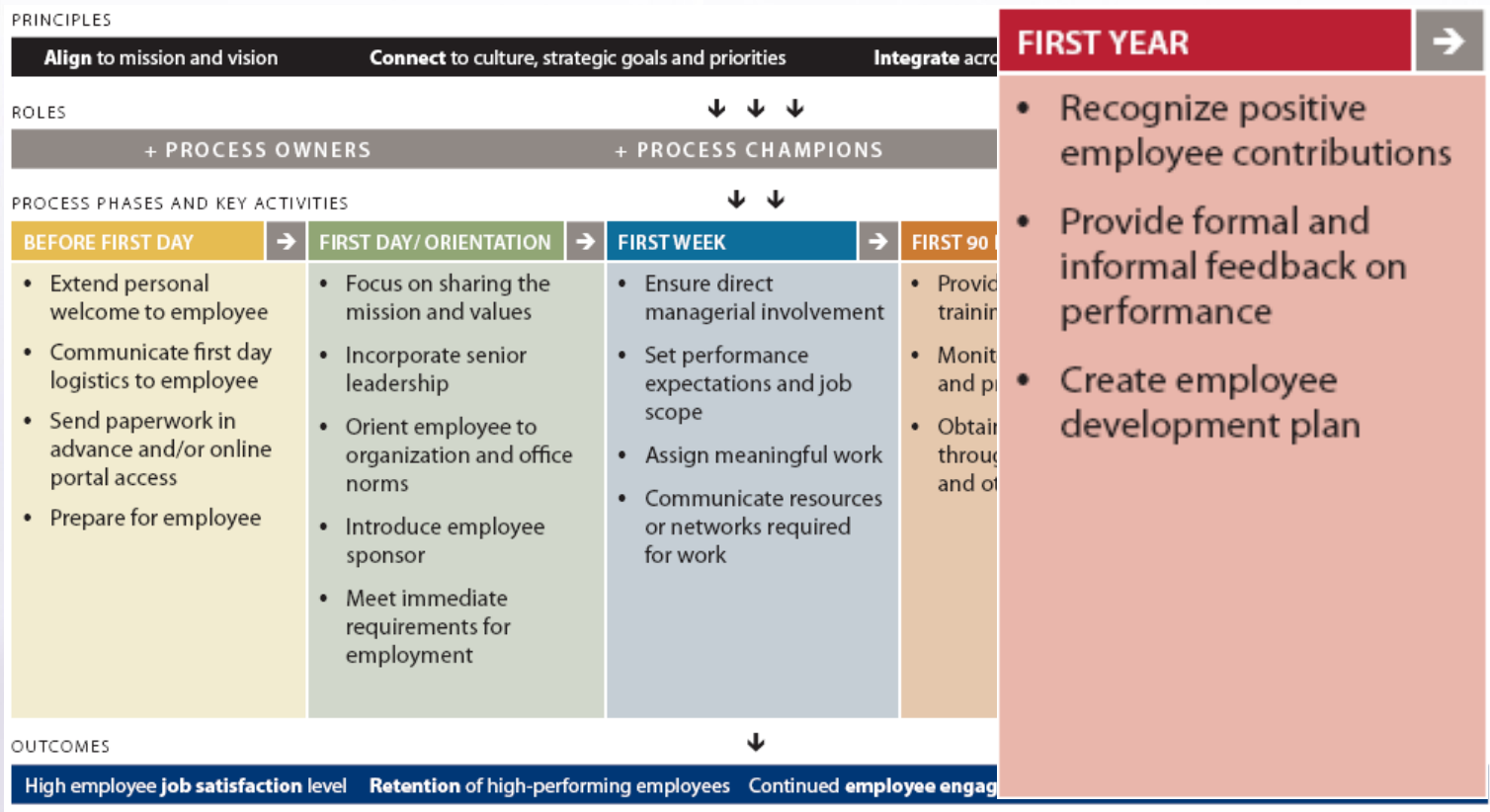| ...of high-performing employees | Continued employee engagement and commitment | Faster time-to-productivity |

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- Provide formal and informal feedback on performance
- Create employee development plan

OUTCOMES ↓

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GETTING ON BOARD | A MODEL FOR INTEGRATING AND ENGAGING NEW EMPLOYEES

APPENDIX C:
BEST PRACTICES ONBOARDING CHECKLIST

NEW EMPLOYEE INFORMATION	Name:	Start Date:
	Position:	Supervisor:
	Office/Cube Number:	Phone Number:

	Task	Status
BEFORE FIRST DAY	Send welcome packet with important information (e.g., benefits and first day logistics) and welcome letter	☐
	Provide agency and job information	☐
	Encourage the review and completion of paperwork (if feasible) before Day 1	☐
	Contact new employee to answer questions and set expectations	☐
	Assign a sponsor/buddy	☐
	Assign and prepare workspace and provide office supplies	☐
	Ensure "office essentials" (e.g., computer, phone, e-mail, training accounts) are set up	☐
FIRST DAY / ORIENTATION	If possible, personalize the experience with something unique for the new employee (e.g., welcome note, flowers, nameplate)	☐
	Communicate vision and mission, and administer a formal oath	☐
	Introduce new employee to sponsor/buddy	☐
	Complete paperwork and security requirements	☐
	Explain benefits and policies	☐
	Have a senior leader welcome new employees (in person or through recorded means)	☐
	Arrange for new employees to eat together or for someone from each employee's office to eat lunch with them on their first day	☐
	Provide realistic information about the organization and its culture and avoid "over promising"	☐
FIRST WEEK	Ensure that job roles and responsibilities are clearly communicated to the new employee	☐
	Introduce the new employee to other employees and senior staff	☐
	Provide meaningful work for the new employee — either training or substantive work related to the new job	☐
	Ensure that a senior leader (in the new employee's office) welcomes the new employee(s)	☐
	Review the organizational structure and key staff	☐
	Provide a list of contacts who can address the new employee's questions on a variety of issues	☐
	Gather feedback about the orientation program from new employees	☐
FIRST 90 DAYS	Review performance objectives and set individual development goals	☐
	Give performance feedback early and often to the new employee	☐
	Provide training, as needed, to help the new employee understand internal systems, general operating practices and obtain other information or skills required in the performance of his or her job	☐
	Discuss individual work styles and preferences	☐
	Arrange for the new employee to meet key stakeholders from other departments	☐
	Check with new employees regularly to ensure that they continue to assimilate and expand their knowledge and capabilities	☐
FIRST YEAR	Provide training to build competencies and fill any skill gaps	☐
	Conduct a new employee survey and address any issues surfaced	☐
	Assess the performance of the new employee periodically — formally and informally — and provide feedback: • Informal "manager check-ins" should occur regularly in addition to formal performance assessments, which should be completed after six months and one year. • The human capital office should send a reminder e-mail to managers at the six-month and one-year mark to ensure that formal performance reviews occur.	☐
	Ensure a senior executive or manager sends a congratulatory e-mail or letter on the employee's one-year anniversary (can be done automatically without requiring the executive's time)	☐

19

The Problem: NAVFACHQ

- New hire pre-employment process at NAVFACHQ
  - Current process cycle time 90 days or more
  - Process did not meet the needs of managers or new employees

Our Approach

- Lean Rapid Improvement Event
  - Purpose
    - To improve the efficiency of NAVFACHQ Civilian Employee Onboarding Process
  - Team
    - Representatives from key process stakeholders

Project Charter

- Scope
  - From new employee selection to checking into organization

- Metrics
  - Reduce project cycle time to 30 days
  - Improve manager perception of the process
  - Improve employee perception of the organization

Project Outcome

- Eliminated un-necessary process steps
- Reduced cycle time by 20 days
- Reduced HRSC tasks by 50%
- Reduced check-in points of contact from 9 to 3

Project Benefits

- Improved customer satisfaction
- Reduced loss of future employees
- Developed new employee check-in process
- Developed New Employee Sponsorship Program
- Developed a Welcome and Resource Guide for new employees
- Began monthly Command Indoctrination Sessions

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Onboarding Next Steps

- Refine New Employee Orientation process

- Develop survey to capture feedback on Onboarding process

About the OCC

The Office of the Comptroller of the Currency

- Charters, regulates and supervises 1600 national banks and supervises 50 federal branches of foreign banks

- 3000+ employees
    - Bank Examiners
    - Attorneys
    - Economists
    - ITS

- 2003 projected retirement bubble - major skill gap

- Bank Examiner certification training averages 5 years

- 60%+ turnover of pre-certified Bank Examiners

- Very low turnover rate post certification (<5%)

- College Recruiting
    - challenge of retaining millennials

Onboarding/Retention Best Practices

Before First Day

- College Recruiter Coordinator Program
- Career Exploration Days
- OCC Branded Welcome Gifts
- Electronic sign-in process

First Days

- Full week of Orientation
- Office space prepared
- Computer assigned

Onboarding/Retention
Best Practices (Cont.)

Entry Examiner Onboarding

- 6-8 month Training Team Experience
  - 4-5 members
  - Full time Training Team Leaders and Assistants
- Assigned sponsor in duty station
- Generational Diversity Training
- Individualized development plan in preparation for certification testing
- Regular surveys and focus group feedback
- 3 Year Career Forum

Onboarding of New Managers and Executives

- New Hires

- Internal Promotions

- Clarity of job scope

- Clear performance expectations & feedback

- Coaches