

How to Build an Executive Onboarding Process that Works for Your Organization

Brenda Hampel, Partner Connect the Dots Consulting

Are you an HR leader who has been given the responsibility for building an executive onboarding process? This can be a challenge given all of factors that need to be addressed, as well as the confusing list of solutions in the market. In addition, organizations are constraining HR budgets, and we all suffer from a lack of time. How, then, can we build highly effective executive onboarding processes for our organizations?

First, a definition

It is important to make a distinction between new employee orientation and executive onboarding. Orientation tends to be short-term, event focused, one-way communication about the organization. Executive onboarding, on the other hand, is a longer-term process designed to improve assimilation of the new executive (into the role, team, and organization) and speed up the learning process and performance level. Some HR leaders see the increased focus on executive onboarding as a fad, something to put in place because other organizations are doing so. While it is true that heightened emphasis is currently being placed on executive onboarding, there is abundant evidence that this attention is deserved -- many newly placed executives struggle in and/or derail from their roles. The cost of that failure is high – one client’s utility analysis revealed a minimum hard cost of \$421,000 to replace a director-level derailed leader.

Assess Need

Before building an executive onboarding process, it is critical to confirm the need for such an intervention in your organization – there must be pain around derailment or other failures of newly placed leaders to meet organizational expectations. Without pain, you will have difficulty gaining support.

Some diagnostics include recent, highly visible derailment by a key leader, 10% or higher annual executive turnover, or a pattern of sub-optimal performance by leaders in a particular function or business unit. Importantly, there are a variety of forms of failure for new leaders. Some fail visibly and exit the organization promptly. Others become mediocre performers who cannot grow beyond their current roles. Still others fail to contribute but are allowed to remain in a role that severely restricts their authority and/or impact. As you begin the process of building organizational support for executive onboarding, remember that metrics are helpful, but horror stories hit close to home. Use both to illustrate organizational need.

Don't start from scratch

In nearly every organization, tools and processes exist to support newly placed leaders. Think through the onboarding process life cycle to identify the components already in place in your organization. In the recruitment process is the candidate given a realistic preview of your corporate culture and expectations for the role? Do you have a standard packet of company information for review pre-hire? A checklist for setting up the new leader's office? While these may sound like routine administrative activities, failing to put them in place can have negative effects on the new leader. Do you schedule meetings for the new leader's first several weeks in position? Perform a New Leader Assimilation? These can be wonderful tools to smooth the newly placed leader's transition, as well.

How well do the hiring managers typically structure/support the new leader's early performance? What role does the HR partner play? How do you help place the leader's role within the context of the larger organization? How do you teach the leader the company's math and language? Identify and address stakeholder concerns? Fit with the company's planning and budgeting cycle?

By inventorying practices already in place, it becomes possible to build an onboarding road map to fill the gaps. What roles does technology play in onboarding? Does your company have a coherent, systematic way of structuring and process-managing multiple onboarding simultaneously?

Build broad support

Clearly, the first step in building an effective onboarding process is making the business case. Importantly, that business case will most likely help you sell the process to only one of your two key audiences: Human Resources. In most organizations, the only way to more broadly "sell" onboarding is to build and demonstrate success stories.

Although there may be a temptation within your organization to house executive onboarding with a key related function (like recruitment, leadership development, or organizational effectiveness), real success comes from a unified systemic approach. Everyone touching the onboarding life cycle needs to understand their impact on, and stake in, successful executive onboarding.

Build a cross-disciplinary team to address executive onboarding. Develop consensus about need; identify the issues and their root causes (if possible). Look for elegant (keep it simple) and scalable solutions. Define ways to measure success, and make it someone's job to get these outcomes. Build a realistic expectation of early success. Be strategic – first target the area of greatest need (business unit or function), and build a pilot process tailored to that need.

Make the onboarding process relevant to your organizational culture

If you seek outside help in building the process, make sure you are the process managers and the consultants serve in an advisory role. Use your good judgment about what will “fly” in your company. Don’t accept a one-size-fits all approach to building an executive onboarding process. Look for integration of communication themes, nomenclature, and visual elements with your culture and brand identity.

Informally test your product before implementation, and seek feedback from trusted and respected colleagues. Be smart about how labor-intensive you allow the process to be for others. Where possible, automate process components (or, failing that, use readily available templates and train regarding their use). Make it easy for others to embrace your executive onboarding process.

Measure Outcomes

It is critically important to identify outcomes that you are striving to support through executive onboarding – and then measure them. Is the new executive still in position two years after hire? Has he/she been promoted? How is his/her area performing? Turnover on his/her team? Has overall executive turnover decreased? Have you increased the number of internal promotions? Internal transfers? What is the cost of derailment at the Director level? VP level? President? In cases where you have helped leaders turn around, what break-through innovations/practices have they put in place?

Define key outcome measures proactively, but also be responsive enough to identify additional metrics as you implement and sustain your executive onboarding process.

Continuously Improve

All good processes continue to get better over time. Use feedback – from teams, new leaders, and hiring managers – to help you understand how the process can be improved. What works? Needs to be “tweaked”? Discarded? When you hear themes in the feedback, work to understand, and respond to, the issues. This can only increase the organizational relevance of your executive onboarding process.

Stay informed about the latest developments, trends, and tools in executive onboarding, so that you can bring best practices to bear on your processes on an ongoing basis.

By following the steps outlined above, you can develop a high-impact, cost-effective executive onboarding process that can be internally managed and self-sustaining. As you move forward, you will also find that an effective executive onboarding process will help you reduce future problems in employee relations, performance management, and leadership development. We often struggle to find the time to do anything but fire-fighting in our roles as HR leaders. Executive onboarding provides an opportunity to make significant, broad impact in your organization. Good luck!