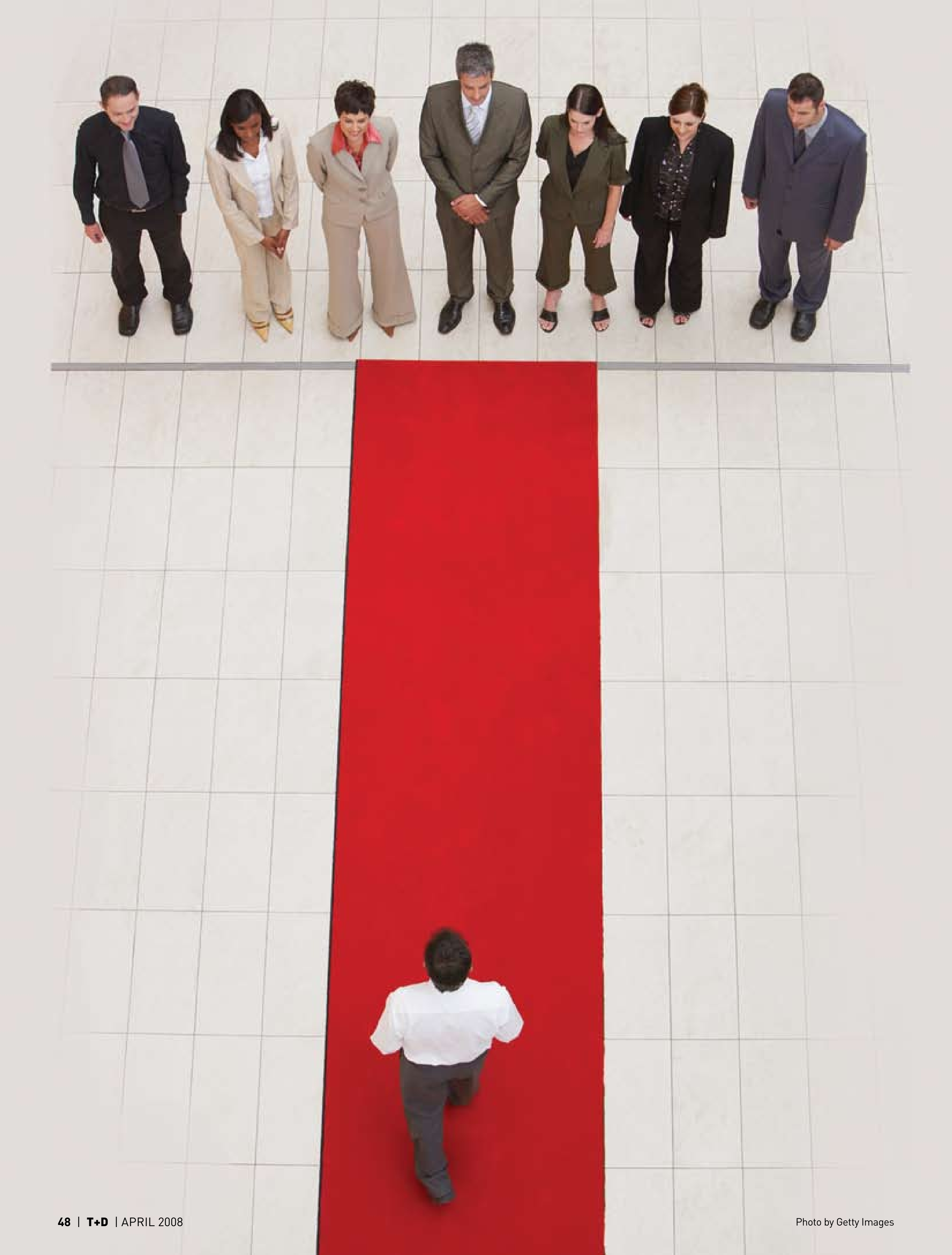

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MANAGEMENT ONBOARDING

By Marjorie Derven

Obtain early allegiance to gain a strategic advantage in the war for talent.

Despite dramatic evidence of the impending talent shortage, few organizations adequately protect the investments made when hiring new managers. The traditional orientation program, with its focus on policies, procedures, benefits, and other administrative issues, comes up woefully short when integrating employees into organizations.

In contrast, onboarding is a systematic process to establish a positive trajectory early in a new manager's career. The approach, which includes cultivating key relationships and access to information, phased implementation, and defining multiple roles, offers a strategic advantage because few organizations do this well.

BUILDING A BOND

Yet, skeptics argue that new managers should be smart enough to figure things out for themselves. Despite compelling evidence that "sink or swim" no longer makes sense—due to the rate of change, organizational complexity, and a tenuous employer-employee bond caused by downsizing—it may be necessary to present a business case to obtain buy-in for onboarding.

Often, the factors that inhibit a new manager's integration have little to do with technical competence. According to Renee E. Russell, executive director of talent management at AVON, understanding organizational values is paramount.

"Our values are really embedded in the organization; they're not just on a plaque somewhere," Russell states. "We say our values are 'in the water' because they are so much a part of AVON."

Fitting into the culture and establishing key relationships are essential to a successful entry. That's why Russell strives to ensure that newcomers, "become educated about our cultural norms and become part of the family at AVON."

The honeymoon period when newly hired managers enter organizations is a singular opportunity to capitalize on their optimism and "imprint" the employer brand, as Libby Sartain and Mark Schumann call this process in their book, *Brand from the Inside.* New managers need to establish an emotional connection to their jobs and the overall organization and will be asking, "Have I made the right decision by joining this organization? Will I be able to make a difference here? Will my contributions be valued by the organization? Will I learn and develop here?" Effective management onboarding accomplishes the related but distinct needs of both the new employee and the organization.

For the new employee. Onboarding reinforces the decision to join and fosters a feeling of belonging. "Managing size and complexity" is the number one challenge that newcomers face when they join Citigroup, which encompasses more than 320,000 employees worldwide, according to Elizabeth Nieto, global diversity and talent director of the Corporate Center at Citigroup.

"From a talent management perspective, we need to break down silos," she explains.

One effective way that Citigroup addresses this is through its 37 employee networks (including Hispanic, pride, and working parents affinity groups, to name a few), which new employees are introduced to on the first day, and which serve as "a great place to meet people and feel more connected to the organization."

Nieto adds, "We've seen that individuals who belong to one of these employee networks report higher levels of engagement and loyalty."

For the organization. Onboarding accelerates the time it takes to realize desired productivity. At Pepsi Bottling Group, onboarding is taken very seriously: "We invest a lot to give managers what they need to do the job effectively," notes Paulette Alviti, vice president of leadership development.

CULTIVATING KEY RELATIONSHIPS

Begin your approach to onboarding by using four initiatives to launch new managers into dialogue with their superiors, encourage

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PHASED **IMPLEMENTATION**

Onboarding provides information and tools to new managers when they are ready to use them, and is best implemented throughout a period of weeks or months. Define goals and accountabilities explicitly for each phase.

- **Prearrival.** Ensure that the new manager is welcomed, and that key constituents (such as direct reports and key customers) know about the start date and relevant background information about scope of responsibilities.

- **Introduction and orientation.** Provide the essential tools to be functional, such as computer passwords, office equipment, knowledge of office layout, administration codes, and access to company email and intranet.

- **Assimilation.** Deliver essential background information about the company strategy, expected contribution, short-term goals, and key working relationships.

- **Integration/contribution.** Define long-term results and make sure that early contributions are visible.

collaboration, specify expectations, and merge with their new teams.

Involve the boss. The new manager's boss has to be accountable for addressing relationship and expected contribution early on, and cannot delegate this to HR or any other function. This must be based on an early dialogue and discovery process. Some key questions that need to be addressed with the boss include:

- What are the key short- and long-term priorities?
- What are the formal and informal channels that will be most critical to achieving expected results?
- What factors are most important in our working relationship (such as frequency and method of communication)?
- What level of support and resources are available?

Promote critical relationship networks for collaboration.
With cross-functional collaboration increasingly important in flattened and matrixed organizations, new managers must integrate with their counterparts and internal customers effectively.

Early on in the new managers' entry, set up introductory meetings that cover not only respective accountabilities within these key networks, but also ground rules for working together going forward.

Newly hired managers must quickly assess their key peer networks, as well as internal and external customers. Provide tools during onboarding to diagnose the factors that make these influence relationships work. Establishing positive peer relationships early on builds a foundation that is critically important, as future conflicts over competing priorities and resources are inevitable. Such disagreements can be more readily tackled when relationships start out positively.

Provide mapping tools to help the new manager define the "inner circle" of key internal relationships most critical to getting work done, as well as a secondary ring of relationships that may be less integral to the job but still need to be established the right way.

Similarly, external relationships with first- and second-tier customers should be defined in terms of their needs, competitive threats, and an understanding of the "value proposition" and brand that the organization wants to convey. Relationships within the new manager's network need to be built on a foundation of clarity, reciprocity, mutual respect, and communication.

Stipulate links between organizational strategy and the new employee's expected contribution.
New managers must clearly understand the mission and business of the organization and how their work contributes to its success. While clearly some positions have a direct line of sight to the business (such as a marketing manager in a consumer products company), even roles that have a less direct impact (a security manager in a law firm for instance), must have clear links.

FROM ORIENTATION TO ONBOARDING: AN EVOLUTION

SHIFT	FROM	TO
Focus	HR policies and procedures	Broad focus on success factors and company culture
Timing	Single event	Phased approach
Delivery	Classroom-led	Use of multiple modalities, including web-based and classroom methods, and CD-ROMs
Responsibility	HR	Shared responsibility with HR, new boss, peer coach, and process owner

This not only builds greater allegiance to the overall mission, it promotes a strategic mindset. Alviti describes the process at Pepsi Bottling Group in this way: "We paint a picture of what success looks like and then provide the necessary tools to help new managers assess and develop their business from all viewpoints."

While background information about the organization's key markets, strategy, competitors, products, and services may be delivered electronically as background context, translating the strategic vision to the new manager's span of control must be defined through a discovery process with the boss and other key individuals.

Help new managers assess their teams and direct reports. Successful integration of new managers promotes more positive relationships with direct reports, and as a corollary, supports how they feel about the organization and their jobs. This is an intuitive truth that anyone who has held the same job, but with different bosses, can readily attest to.

As new managers' success will be strongly dependent on the quality of their direct reports' work, it is important that they quickly establish credibility with their inherited team and demonstrate a desire to work well together. Concerns that need to be addressed early on to get such relationships started include an understanding of each direct report's skill level compared with the required accountabilities. How much supervision is needed, and what is the assessment of long-term potential? Furthermore, are there any immediate performance issues that need to be addressed?

Managers consciously and sometimes unconsciously shape the culture they want and define how things will get done. With responsibility to reward desired behaviors and results, it is critical that they understand the larger cultural context. One model that can be useful for new managers to assess teams (or districts or regions) that they have inherited is proposed by Michael Watkins in his book *The First 90 Days*. Managers can assess the team in the following ways:

- **Start-up mode**—characterized by new members, new geography, products, or responsibilities
- **Turnaround**—where results are short of requirements and decisive action is needed quickly
- **Realignment**—where the team has a history of success but has plateaued, and generating renewed excitement toward shared goals is paramount
- **Sustaining success**—marked by the team performing at high levels.

Each type of team transition has different implications for the manager. A misalignment will seriously sidetrack progress. Clearly, a newly hired manager has the potential to unleash new levels of productivity, enthusiasm, and discretionary effort from his direct reports and teams, or conversely, to severely disrupt productivity.

DEFINING MULTIPLE ROLES

While the new manager assumes personal responsibility for learning, delivery of onboarding phases requires a coordinated interplay of many important roles. These roles include an executive sponsor, who provides resources, visibility, and support for the initiative, and ensures there is accountability for doing this. Another is the new manager's boss, who acts as the direct conduit to the organization and provides direction about expectations.

The training and development department and HR often have responsibility for the design of the onboarding process, working closely with subject matter experts. A process owner then assumes part-time responsibility, armed with a checklist, to orchestrate resources and ensure quality control so the new manager gets the right information at the right time. Note that this role is not needed in every case, but it is especially important if there are remote geographies involved or if the new manager is in a unique job with specialized needs.

Lastly, a peer coach is available as a sounding board and can provide organizational direction and insights in a lower-risk relationship compared with the new boss. This role, Alviti explains, "is a great opportunity for individuals to distinguish themselves from their peers," and is used by Pepsi Bottling Group as one consideration for moving to higher levels of responsibility.

VARYING DELIVERY

Content about the organization that is core, common, and critical can be delivered online and modified as needed for a wide range of jobs. Information that requires interpersonal interaction is best delivered in a classroom setting. The new manager assimilation program at Citigroup is an example.

"Direct reports submit questions or concerns in writing to the new manager, who prepares responses so that they start the relationship with an awareness of key issues and get these addressed early on," Nieto explains.

A similar process is used at AVON, according to Russell. If geography or small numbers make classroom delivery impractical, content can be delivered by a designated peer coach and the manager.

THE PAYOFF

Clearly, successful onboarding of new managers has a larger impact that extends beyond the newcomers. Direct reports' level of commitment and engagement, productivity that depends on shared coordination across the organization, and achieving expected results all relate to a positive start.

"I want to know if the person has been integrated into AVON? Do they understand how we make money? Have they set goals for themselves at the outset?" Russell explains. These are among the factors Russell analyzes to determine if onboarding is effective.

Onboarding for new managers protects the investment made during the talent acquisition process. "Onboarding has a huge payoff for us," Alviti emphasizes. "Good onboarding directly correlates with reduced turnover."

An integral part of talent management, onboarding helps organizations realize a strategic advantage over others who fail to manage the early entry period. **T+D**

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