

From
Onboarding
to **Everboarding**

Redefining Employee
Development



Amber Watts

More Praise for *From Onboarding to Everboarding*

“This book is a must-read for leaders who want to create a culture of continuous growth and development. It provides a strategic, scalable approach to keeping employees engaged beyond their first few weeks—exactly what modern organizations need.” —**Ryan Austin**, Founder and CEO, Cognota

“Amber Watts brilliantly highlights the importance of continuous learning and reinforcement in today’s fast-changing world. This book shows how everboarding is not only the future of onboarding, but also the key to thriving in dynamic workplaces. It’s not a question of if you will embrace everboarding, but when.” —**Melanie Fellay**, Co-Founder and CEO, Spekit

“I’ve seen firsthand how effective onboarding can shorten new-hire ramp times and improve production. I’ve also seen how engaging managers and fostering employees to own their development can create a cadence of continuous improvement that lifts performance across a sales force. In her book, Amber tackles all angles with proven, effective advice that every sales leader and enablement professional should adopt. Buy it, read it, apply it.” —**Mike Kunkle**, Vice President, Sales Effectiveness Services, SPARXiQ; Author, *The Building Blocks of Sales Enablement*

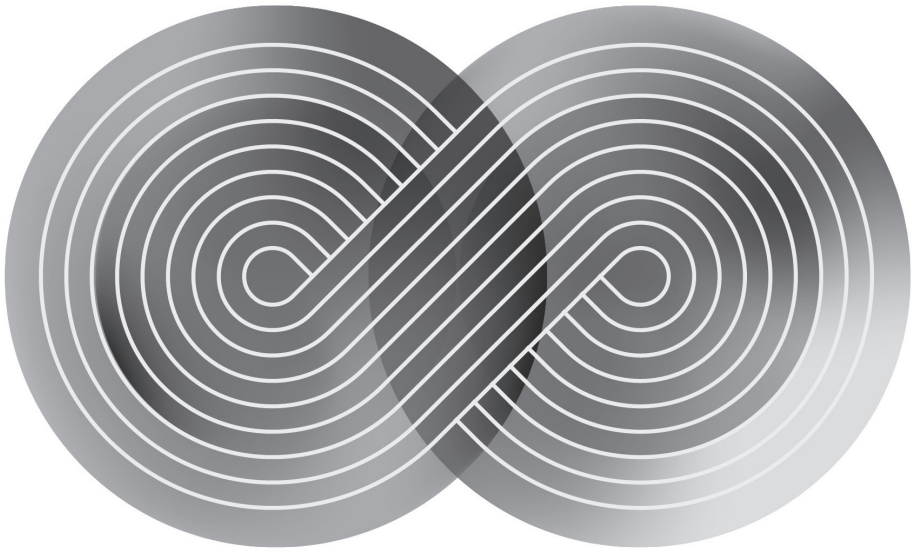
“Forget onboarding that stops at week 2—this book delivers a masterclass in making employee development a lifelong VIP experience. With a smart blend of strategy, psychology, and just the right dose of ‘Why didn’t we always do it this way?’ everboarding transforms talent development from a checkbox into a culture. A must-read for anyone serious about retention, growth, and finally getting employee engagement right.” —**Cara North**, Vice President, HR Product Management, JP Morgan Chase

“*From Onboarding to Everboarding* flips the script on how we bring people into the fold—it’s not about endless training; it’s about nurturing confident, capable team members who grow and contribute well beyond day one. With wit, wisdom, and plenty of real talk, this book is a must for leaders ready to evolve their approach.” —**Kassy LaBorie**, Keynote Speaker and Author of *Interact and Engage! 75+ Activities for Virtual Training, Meetings, and Webinars*

“Brimming with smart, timely strategies, this book ensures employees get the development they need—right when they need it. Everboarding is your answer to talent development’s ever-evolving needs to support our ever-growing organizations in an ever-changing world. This isn’t just about 24/7 access to learning—it’s a transformative, ongoing approach that equips every employee to meet your organization’s ever-shifting demands.” —**Elaine Biech**, ISA Thought Leader; Author, *The Art and Science of Training*

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atd

PRESS
Alexandria, VA

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ATD Press is an internationally renowned source of insightful and practical information on talent development, training, and professional development.

ATD Press

1640 King Street
Alexandria, VA 22314 USA

Ordering information: Books published by ATD Press can be purchased by visiting ATD's website at td.org/books or by calling 800.628.2783 or 703.683.8100.

Library of Congress Control Number: 2025934708

ISBN-10: 1-96023-128-6

ISBN-13: 978-1-960231-28-4

e-ISBN: 978-1-96023-129-1

ATD Press Editorial Staff

Director: Sarah Halgas

Manager: Melissa Jones

Content Manager: Mallory Flynn

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Production Editor: Katy Wiley Stewts

Text Designer: Shirley E.M. Raybuck

Cover Designer: Rose Richey

Printed by BR Printers, San Jose, CA

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Introduction

Back in 2016, I was working for a large healthcare staffing company that had a reputation for an outstanding onboarding program. My team had won a BEST Award from ATD, been recognized as one of *Training* magazine's Top 125 winners (now Apex Awards), and granted a Best Places to Work Sustained Excellence Award. We were confident that our workplace learning efforts were perpetually great.

Our onboarding program was a well-oiled machine, and senior executives not only sponsored it, they also actively participated. We were intentional about assessing new hires' progress, gathering their individual feedback, and coaching them one on one, each week for 13 weeks. Once a new hire successfully completed their formal training, they received college credit with a local university. Our industry-recognized onboarding program helped us secure top talent. Looking back, I believe that what ultimately made the onboarding program so successful was the alignment we had with our people managers and the carefully selected mentors. Everyone was drinking the onboarding Kool-Aid, including myself.

Then, a new team formed within the company. They needed training content for current and future employees, so I began to closely partner with them. All their current employees had previously benefited from our successful onboarding program. One had even been a Rising Star recipient—an award given to the top-performing new hire. But, as the months passed by, I grew concerned about their team's knowledge of relevant, up-to-date strategies and industry changes. Specifically, employees seemed to have taken two steps backward in their performance between months four and 12. When I initially brought this concern up, I was told that “it's typical for employees here and they'll turn it around.” Well, the next logical question I asked myself was, “If that's typical, why aren't we solving for it?” It became

glaringly obvious to me that their professional development ended the day an employee graduated from onboarding. It's best described as booting them off the metaphorical cliff without a parachute and their manager waiting for them at the bottom. I knew there had to be a better way.

From that experience, my first attempt at everboarding was born—I used to label it “postgrad training” and “monthly refreshers.” Identifying topics and skills for these new ideas was not easy because my organization wasn't actively capturing that data. I had to go directly to the source: the people. Over the course of several months, I interviewed branch managers, team leaders, regional managers, employees between four and 12 months of tenure, and the L&D team. My goal was to get a very granular understanding of gaps in workflows and skills learned in onboarding. Patterns emerged and I was able to identify what dropped off at each month of tenure. From there, I put together a training schedule for months four through 12 to try to combat the forgetting curve. I created monthly refreshers to alleviate resistance toward adopting new business processes and technology. The first monthly refresher was also the first time my team used virtual training technology to reach employees at all locations.

Leadership had been extremely supportive of the onboarding program, which led me to assume they would be supportive of these two initiatives. While the monthly refreshers were well supported and well attended, postgrad training received resistance. Leaders didn't want to allow their employees to head back to the training room once a month for more development until they reached one year of employment. In their minds, the employees were on the typical trajectory, and I had not yet convinced them that there could be a better way. It took time to gain alignment and a path forward that better prepared the newest employees, but once we did, we saw a ripple effect. The employees participating in postgrad training were elevating the employees in our onboarding program and also teaching their tenured teammates new, improved ways to do things.

The virtual refreshers were going so well that we shifted the postgrad training to virtual—and that one change put many managers' minds at ease. No longer was I requiring their employees to travel to other locations,

reducing the time away from their desk. Looking back, I think the shift from opposition to acceptance can be attributed to manager inclusion. We had never formally trained employees past onboarding, and the trust to do so was not yet established. Luckily, a manager shared this with me and I was able to adjust my approach and give them a louder voice in their respective market.

My time in that role allowed me to test these ideas out and bring the concept of everboarding to future workplaces. The industries and products changed, but the need to remove onboarding's exit day remains everywhere I have led learning. Year after year, I have evolved everboarding into a holistic talent strategy by removing outdated practices such as new-hire graduations. That strategy is now fully baked and ready to be shared in a way that you can actually reheat and serve to your own team and organization.

What Is Everboarding?

In many ways, I was advocating for everboarding even before I realized I was doing it. And now, I've become a full-blown advocate of this approach to employee development. I have led workplace learning at an HR software company, a data and marketing company, and a global hospitality software company. I've also worked as a consultant, but bringing the everboarding approach hasn't been easy and it's often required level setting with organizational leaders and managers about what it is and isn't. For example, when I was working for a global hospitality software company, the chief revenue officer (CRO) warned me: "Amber, this is something my prior Fortune 500 company wasn't even doing. I'd love to support this, but do we really have the resources to do it?" I'll never forget that. But, we didn't need the technology, people power, or budget that those companies have to be successful, and it took me one conversation (and a lot of preparation ahead of time) to help them see that.

The dominant challenge I faced was that very few companies have an established onboarding program, let alone something resembling an everboarding strategy. As a consultant for Spekit, I spoke with learning leaders at companies of all sizes and in various industries. I learned only one of

them had a continuous learning strategy in place, but even their onboarding program was brief and impersonal. Despite these differences, they all had one thing in common: Every learning leader saw the value in elevating their managers' people development skills and wanted to take the steps to implement an everboarding strategy.

When I advocate for everboarding, however, I often hear some common objections and misconceptions:

- It's the flavor of the month.
- It's more training and we don't have that kind of time or budget to support it.
- It's just extending our onboarding program, and new hires need to be ramped up by week two so we can start our next class.
- It's more content and we don't have time for that because we just lost half our team due to layoffs.
- We don't have time, we don't have time, we don't have time.

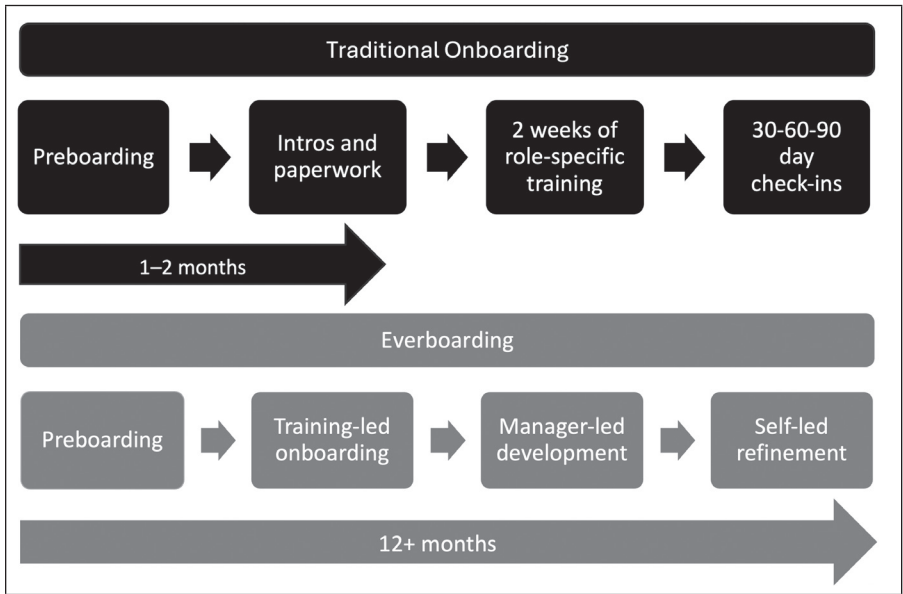
Before I offer my explanation of everboarding, think about your perception of it. Is it a talent program within your workplace? Would you consider it a new training methodology? Or do you think it's like riding an impossibly long skateboard? Just picture it: If you start your journey now and all goes well, you might make it to the end before skinny jeans make their next comeback. In all seriousness, it's none of those (although the last one is the most plausible).

Often, these misconceptions occur because we're thinking of everboarding as something that it's not. The word *everboarding* itself is autological; it combines the words onboarding and evergreen—meaning, learning has no end. At its core, *everboarding* is a strategy that supports all your talent management programs from acquisition to succession planning. Unfortunately, I continue to see it being marketed as a continuation of onboarding, and if that's the approach you choose to believe and take, it will not transform your organization.

I've discovered through my networking, speaking, and consulting experiences that most organizations spend around two weeks onboarding employees and offer little support thereafter. You might be thinking that

it depends on the role. And, you're right; onboarding timelines are role dependent, but everboarding removes that dependency. When employees are given an abrupt end to training and left to go it alone, they will consume misinformation and develop poor habits, or worse they will fail. The model in Figure I-1 compares traditional onboarding to everboarding. Use it to envision how everboarding supports your employees on their entire journey from becoming top performers, moving into new roles, preparing for promotions, overcoming performance gaps, and eventually offboarding.

Figure I-1.
Comparison of Traditional Onboarding and Everboarding Approaches



In this book, you'll learn that onboarding is only the first phase—the launch phase—in a three-phase everboarding strategy. You'll learn how keeping new hires in training is not the answer. Creating more content for them to consume and providing accompanying formal assessments to pass will cause resistance among employees. In my experience, everboarding works best if we treat it like a strategy or a science. Only then will it be scalable, measurable, and sustainable.

This book offers a deep dive into the three-phase everboarding strategy that you can incorporate into any organization of any size and industry, with quick actions to start implementing it. Whether you have robust learning programs in place or are just beginning to formalize learning in your workplace, this strategy is flexible to fit your team and your unique needs. To demonstrate that, I'll share three case studies from companies that have adopted this approach to employee development.

Have you heard the overused phrase, "It's a marathon, not a sprint"? Well, everboarding is neither—it's more like a relay. Each talent management function carries the baton and onboarding is your first runner. Whether a team or an individual owns these functions, sometimes in silos, they all receive support from this new strategy.

Phase one—the starting line—is onboarding, and it's arguably the most important phase of everboarding. It sets the tone for what learning in your workplace feels like! We will discuss the importance of creating a charter and how it will set you up for everboarding success. Expect to learn new best practices, ways to assess onboarding effectiveness, who the key players are, and how to seamlessly pass the baton to managers.

Phase two—the middle leg—involves diving into the role managers play in employees' development and how the talent development team can prepare them to run with the baton. A manager's ability to coach and develop their employees will make or break your everboarding strategy. Without proper training and resources to support them, managers can't support their employees. Expect to learn why managers are truly the cornerstone of employee success and your most valuable ally in all things learning and performance. Whether you're reviewing assessments, coaching models, or toolkits, you'll want a highlighter handy for the chapters in this phase.

Phase three—the final leg—is the refinement phase of your everboarding strategy. It will help you ensure consistency across your organization, as well as inspire and influence a culture of self-led learning. The world is evolving and your reinforcement efforts must be along for the ride. This part is full of tips on how to continuously support employees in a hybrid

environment and how to bring current employees into the fold. (I promise to provide better folding directions than an episode of *Schitt's Creek*: “Just . . . fold them in.”)

The Benefits of Everboarding

According to ATD’s 2023 research report *Building a Strong Organizational Culture*, training and facilitation efforts (83 percent) and onboarding programs (70 percent) had the most positive impact on organizational culture. Onboarding is the time to introduce new hires to your company’s values and culture, and failure to convey these elements leads to misalignment and lack of engagement in continuous learning. If you are reading this book, you likely know how a lack of training and onboarding can negatively influence your organization’s culture. You care deeply about employee development past onboarding and are wondering how an everboarding strategy can integrate with your current talent management efforts.

An everboarding strategy has several benefits compared with an onboarding-only approach to employee development or with a disjointed onboarding and occasional training experience:

1. **Engagement.** You’ll see an increase in employees’ engagement with their work, their team, and the organization when they feel confident and supported with the right tools and resources throughout their entire employee life cycle.
2. **Acquisition.** Help your recruiting team land top talent with a message to candidates that says, “We care about your success here and we will invest in it beyond orientation.”
3. **Succession planning.** A safe environment for ongoing development supports a strong internal bench to face the growing skills gaps in your organization.
4. **Performance support.** You can now help employees achieve mastery because onboarding alone can’t.

Everboarding is gaining momentum and it’s no surprise why. The way we’ve always done things is no longer working, especially in a world with virtual and hybrid workplaces. Additionally, we’ve witnessed the Great

Resignation, quiet quitting, and quiet hiring, and we're left to navigate the mess they've left in our workplaces. The demand for a new way, like everboarding, is flooding our newsfeeds and inboxes with numerous thought leadership articles, sponsored webinars, and learning technology companies rebranding their go-to-market messaging. Yet, I bet you still don't have a robust plan for how to make this change. This book couldn't be more timely. I will debunk the myths and misconceptions around everboarding and give you a path to application.

The more L&D professionals I've shared the concepts in this book with, the more confident I am in the impact it will have on the workplace. Recently, I presented a one-hour virtual program about implementing an everboarding strategy to a local ATD chapter. A concept like this takes time to gain buy-in and shift the mindset across the organization, but a week later, I received an email from a participant stating that they were making progress! Not only were they tossing out the two-day orientation they currently offered to anyone who wasn't sales, they added a new role to their team because their senior leader could see the value in ongoing development. With the addition of this new role (an employee development specialist), they will be able to devote time to developing employees outside sales for the first time. This person, in partnership with the curator on their team, will support a powerful ongoing development experience.

Do You Want to Redefine Employee Development?

If you believe that onboarding in your workplace needs to be revolutionized, this book is for you. You are the voice, the pioneer who can influence your team and your organization to embrace this strategy as a new, better path forward. Imagine a workplace where employees are constantly improving their skills and embracing new challenges with confidence. You can create that reality, but not without allies.

According to research conducted by Gallup (n.d.), only 29 percent of employees say they feel fully prepared and supported to excel in their role after their onboarding experience. Two-thirds of employees are left with doubt and uncertainty. They're wondering if they will succeed or receive

any support they might need. If you want to have stellar employees, they need to have stellar development.

I can't accompany you to your strategy meetings and get your team on board with everboarding, but I can provide what you need to build your business case. With this book as your talent strategy GPS, you can create the people-centric approach that our industry is evolving toward.

“Courage is the root of change—and change is what we’re chemically designed to do.” —Bonnie Garmus, *Lessons in Chemistry* (2022)

Are you ready to inspire self-led, continuous learning in your workplace? Tie your laces and grab your baton. Your everboarding journey has just begun. *starting pistol shoots off*

CHAPTER 1

Everboarding as a Must-Have Strategy

Everboarding Myth #1

Everboarding is a continuation of onboarding.

Learning at work is a fundamental need that all employees must receive support with. Building a culture of learning requires psychological safety and the ability to fail without consequence. Having one indicates that your team is full of curiosity. However, learning is not an indicator of success, and simply having a culture of learning is not the end result of an everboarding strategy, as it is often presumed to be.

Rather, everboarding creates a culture of growth. When you integrate your learning initiatives with your other talent management initiatives, such as performance management, you foster a culture of growth in which success is measured by progress and improvement, not just a willingness to learn.

Getting Involved

As the world rapidly changes, talent development must keep up with the demand within our business, and the only way you can be aware of each team's unique needs is to be closely involved. Be a partner and an ally to guide the leaders of your organization. You don't need to have all the answers to their challenges, but you can partner to help them uncover those answers.

Everboarding is not a formal learning program. It is an effort to continue the conversations, the collaboration happening on and off teams, the allyship with frontline managers, and a support system for your senior leaders to see their change initiatives followed through. Don't simply rely on your training intake process—be proactive and suggest training or other development solutions where you see gaps!

There are many ways in which your team can make itself an available partner in new initiatives. Here are some I've seen work well:

1. **Offer to be a part of a technology evaluation.** Someone on your team is considered an expert in a current solution and knows the user experience well because of the feedback they get during training. They can help stakeholders compare options.
2. **If your talent acquisition team is revamping the hiring experience, offer to be a part of it.** Someone on your team can share what a new hire can expect in the first 30 days on the job, which is a common question from candidates. Your team is also a great resource for common challenges new hires encounter. Whether there is a project on the talent acquisition team or not, keep this line of communication and feedback open and help them continuously improve their hiring process.
3. **If focus groups are being created to address the largest concerns in annual engagement survey results, participate.** Have multiple people from your team be a part of these groups to facilitate the discussion because they're skilled in this. Your team interacts with every single person in the organization, and it makes sense for you to understand employee sentiments to improve. From there, you can help create a project plan and identify next steps.
4. **Attend individual team meetings and begin to form trusting relationships.** Be curious and ask questions, but be respectful and don't distract from the agenda. Standalone meetings with your stakeholders are great, but nothing beats firsthand feedback from employees who are doing the work.

When your team is ingrained into the business's major operations, the business can't move forward without you. Everboarding is your way of making your team crucial for business success. You become indispensable.

Share Your Vision

To effectively implement an everboarding strategy, you have to stop looking at it as a linear experience. It is not an “if this, then that” scenario. Everboarding is a collection of experiences that aligns with the individual journey that new hires will take at your organization. Before they can navigate their learning independently, however, you must provide structure and clarity through the application of three thoughtful phases. This will require buy-in, support, and participation from the key players in a new-hire's journey—particularly managers and stakeholders.

First, how involved are the managers and your talent development team in onboarding new hires? Which of these most aligns with your organization's current state?

1. Managers make an appearance on day one and don't see their new employee again until they graduate from training.
2. Managers start one-on-ones in the first week and call their new employee daily. The training team provides minimal formal training.
3. Training is delivered by the training team and performance conversations pick up with their manager afterward.

If you chose number 1, then this chapter is for you. If you answered number 2, then this chapter is also for you. If you answered number 3, this chapter is still for you. An everboarding strategy is unique to your organization because it's completely customizable no matter how engaged the key players are right now.

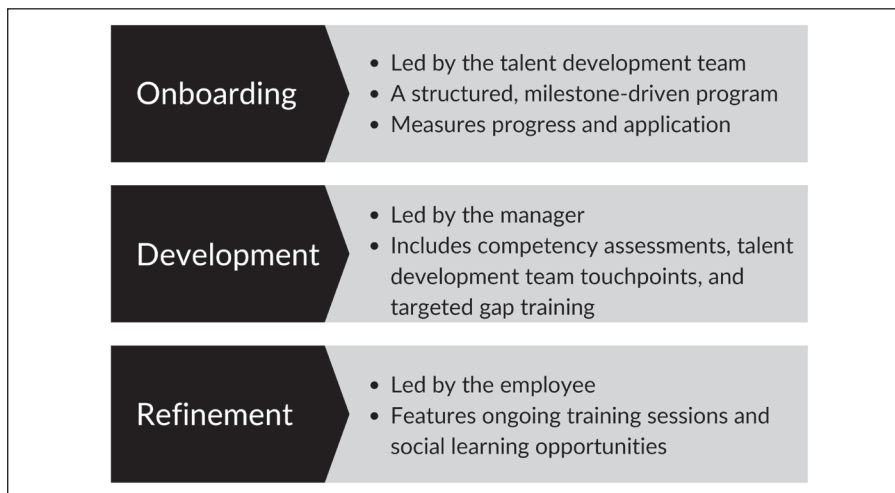
Now, here are some steps you can take to gain alignment from your organizational leaders:

1. **Get buy-in.** Building trust and credibility takes time. Start by asking for it! Interview the executive and seek to understand their perspective of what good and finished looks like.

2. **Get participation.** This comes from belief in your process and resources. Once the interview is over, establish a monthly review session with your executive steering committee (ESC) to maintain alignment. Use this time to solicit feedback on your efforts as they evolve.
3. **Get support.** Strive to get commitment and connection to the value you're creating. Consider establishing ground rules that require a leader's attendance to certain meetings and events. This keeps them interested and engaged in the work you're doing.

Once you've achieved support, you can begin to take action on implementing everboarding's three phases (Figure 1-1).

Figure 1-1.
Everboarding Chunked Out



An employee's experience from being a new hire to self-directing their growth is similar to eating dinner at a restaurant you've never been to. Your server greets you and gets your individual order, you substitute with your preferences, the chef makes accommodations and prepares your food, and then your server brings it to you to enjoy. The plate comes out with a thoughtful arrangement, and you have little to no knowledge

of the chaos and obstacles that may have occurred in the kitchen to get the finished dish in front of you.

Much like everboarding, an employee's experience is unique to their preferences, needs, and selection. The meal you ate was from a list of choices and it was adjusted for you; similarly, your talent development team will guide employees to the next piece of learning they need to consume. It's like I always tell my managers, "They don't need to know how the sausage is cooked. We just need to provide a fully cooked one, and then send them off with leftovers for tomorrow when they forget what it tastes like." In other words, this should feel fluid to new hires even if you and their managers are chunking it out behind the scenes.

In this scenario, you and your talent development team are the chefs and the manager is the server; you're all working together to guide the learner through each phase.

Onboarding

I hear a lot of buzz about everboarding picking up X number of days after onboarding. However, I don't agree with the idea because your onboarding program is unique to your organization. As a consultant, I have worked with organizations of all sizes in many different industries, and I can say with certainty that no one is onboarding for a set amount of time across the board, even in the same industry. The truth is, there is no magic number of days, and there's no way of knowing exactly when your new hire will need more reinforcement.

Formal onboarding still has a place in employee development because it is the most crucial phase new employees will go through. If you get onboarding wrong, the rest becomes irrelevant extra work because first impressions affect future engagement. Think of onboarding as your "show." You're the director and you call the shots. Your new hire is too new to know what they don't know at your organization, which means it's up to you to guide them. Training and talent development is here to ensure new employees are set up for success with a strong foundation.

There will come a time when the manager must step up to the plate for their newest employee—that’s the development phase—but with an everboarding approach, that manager will inherit an employee who has already established good habits, confidence, and a learning-first attitude.

Because I get asked, “How long should onboarding last?” so often, it’s worth unpacking some. Consider these two questions:

1. When is a new hire considered fully ramped in their role? (Use one type of role.)
2. When do you graduate a new hire? Or, how long is your current onboarding program?

Are your answers the same or are they different? More often than not, the learning and training ends before the employee is performing independently. Everboarding supports your new hire up to and beyond their independence. The first phase of everboarding ends once formal training drops below 40 percent each week, meaning, they’re spending more time learning on the job than learning outside the job. Moving from the onboarding phase to the development phase requires a smooth handoff between the training team and the manager.

When I was a part of a large healthcare staffing company, our onboarding program was a well-oiled machine. The handoff to the manager was quite simple—they picked up where we left off. In the first eight weeks, a member of the training team coached the new hire with scheduled weekly one-on-ones, and the manager was required to attend. In those one-on-ones, we reviewed the employee’s weekly performance metrics, discussed how they were acclimating to our technology and their team, and went over any assessments they took. We believed that this was the best way to ensure continuity and help the managers understand how to meet their employees where they were.

Through the onboarding phase of your everboarding strategy, you will establish support teams to directly and indirectly guide your new employees through their initial training. This includes a success team made up of you (or someone on your team), the employee’s manager, and a performance-focused mentor. You will also shift away from one-size-fits-all onboarding

to a more personalized experience. And you will swap out graduations for milestone celebrations, which reinforce that an employee's development does not stop once onboarding ends—it continues through the development phase with their manager to the refinement phase where they're leading their own continuous growth.

Development

This book offers a behind-the-scenes look at an everboarding approach to employee development. And while it's not meant to be shared with a new hire, they must understand what performance expectations will change and shift once a member of the training team is not meeting with them frequently.

It seems obvious right? You'll create a library of on-demand content for employees to access whenever they want. Then, you'll provide managers with assessments, track them in your learning management system (LMS) or other performance management tool, and measure effectiveness over time. If only it were that easy.

More than likely, employees will not make time for learning unless it leads to a promotion, money, or praise; or worse, if they're on a performance improvement plan (PIP) and are desperate to turn it around. On the other hand, managers will likely demonstrate unconscious bias, assess differently, and, unfortunately, feel like your L&D efforts have become yet another box to check on their long list of tasks.

Manager-led employee development is only effective if the manager is equipped to coach, assess, and steer the employee toward the available resources. When managers feel prepared and supported, they can be more confident in their interactions with employees and more willing to apply and adhere to your vision.

Selecting a universal coaching or performance management model is one way to support managers. Without one, you leave a lot to chance because leaders across the organization will be speaking a different language, causing disruption, confusion, and delayed performance. In chapter 8, we'll dive into manager enablement. For now, let's focus on alignment of outcomes.

Once the development phase is in action, take time to create a playbook for your managers. This playbook includes what new hires learn and when, what they will be assessed on and how, and guidance for managers around how to assess their new employee during this phase.

An alignment meeting with your managers can help provide clarity around the contributions and responsibilities of each group. Table 1-1 is an example of how I've partnered with managers in the past to establish important components of a new hire's learning journey.

Table 1-1.
Example of Partnership Between the Training Team and Managers in the Development Phase

Modes	Drivers	Mechanics
Milestone skill assessments	Weeks 3, 9, and 16 scheduled assessments	<ul style="list-style-type: none"> • Led by manager, supported by the training team • Employee and manager evaluations • Rubric provided for ongoing measurement
Skill alignment	Team and individual key performance indicators (KPIs)	<ul style="list-style-type: none"> • The assessments are flexible • Assessments align with current and future expectations • Created with collaboration
Training check-ins	60- and 90-day scheduled check-ins	<ul style="list-style-type: none"> • Ensure smooth transition • Continued support with conversations and survey • Needs analysis

During the development phase, even though the manager is heavily involved, it is still your duty to provide the milestone assessments and determine when they need to happen. Otherwise, they won't get done. Managers are very busy, and milestone assessments won't be a priority, especially if they think the new hire is on track in their skill and competency development. Feedback needs to be provided within the new hire's workflow so they stay the course.

Schedule the alignment meeting before you get too far into the design of this phase. That way, you give everyone a chance to connect team goals and training goals and to identify roadblocks and risk factors. Here are some tips to facilitate the alignment conversation:

1. Capture the goals of each individual team within the company and document them.
2. Identify the potential roadblocks that come with implementing a new technology and how you will overcome them.
3. Consider these scenarios:
 - Who has the capacity to assess each new hire? Is it only the manager?
 - If that person leaves tomorrow, is someone else prepared to manage the assessment?
 - Do you anticipate any changes affecting the training and performance assessments or the skills needed for the role?
 - Is there a place to track progress and ensure information is up to date?
 - What resources do you need to secure (as well as roles and responsibilities) to keep this process sustainable?

These questions and more will help you create your own alignment plan to power the development phase of everboarding. Do not skip this step. It will serve you well later to slow down, ask the right questions, and gain agreement before launching it.

Refinement

The last phase, refinement, is only effective after you've established a strong partnership between the training team and the manager. You should now have an employee who solicits feedback, knows how to learn at work, and has an awareness of what they don't know. As a bonus, their growth will continue as they take on mentorship roles.

A great refinement program is not content-centric. I fully support the creation and promotion of a robust content library. Having learning

content available and accessible at work or at home is essential for maintaining an engaged workforce and cultivating a learning culture. When we consider what self-led learning means, we often envision on-demand learning that lives in our LMS, learning experience platform (LXP), or content management system (CMS). But, what if self-led learning went beyond LMS-powered courses?

Self-led learning requires you to create opportunities that are relevant to the learner's individual needs and goals. For example, in a past role, I was getting feedback from the vice president of sales that the account executives (pre-sales) and the account manager (post-sales) were in constant conflict. They tried remedying the disagreements on a case-by-case basis. The most common source of conflict was the account executive overpromising the customer deliverables that the account manager was inheriting. Oftentimes, this resulted in a churned customer, and fingers were pointed in both directions.

This inspired an opportunity for employees across the organization to try a role for a day. It required a lot of preparation to pull off, but the return on investment was worth it. The account executive and account manager switched roles for a day, and then another day, and another. After three days of walking in one another's shoes, they both gained empathy. We could have simply pulled them into a room, built an LMS course, or continued with our case-by-case resolution, but the role reversal proved more effective. After all, we learn more by doing than by listening.

Creating reinforcement opportunities can take many forms, and it certainly takes time. In Table 1-2, you'll find a high-level overview of a reinforcement strategy that provides ongoing development for employees who have finished their initial onboarding.

The most effective way to continue supporting an employee past the development phase is by blending a variety of learning retention methods. When designing self-led learning experiences, you still need to support their retention. The best method is combining multiple forms versus choosing only one. In Figure 1-2, you'll find common methods used by instructional designers to increase knowledge transfer and application.

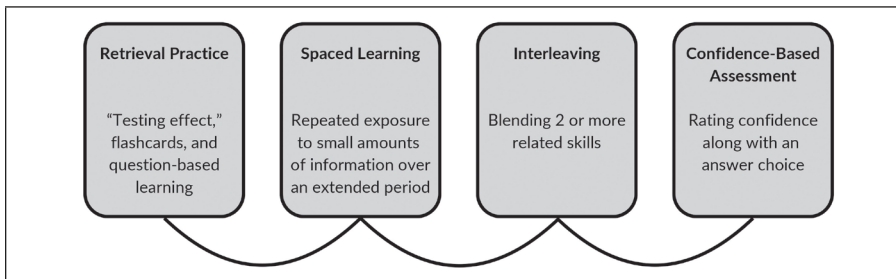
Table 1-2.

Example of a Reinforcement Strategy During the Refinement Phase

Modes	Drivers	Mechanics
Self-paced content	Product or service content library	<ul style="list-style-type: none">• Beyond initial product or service training (e.g., course levels 201, 202, and 203)• Accessed by employee• Agile to fit their development needs
Performance tracking	Individual competency development	<ul style="list-style-type: none">• Manager has bird's-eye view• Progress and efforts are connected
Monthly training	<ul style="list-style-type: none">• Skills (personal)• Refreshers• Skills (professional)• Industry	<ul style="list-style-type: none">• Product and industry updates• Product marketing, vendors, and key leaders• Optional durable skills training

Figure 1-2.

Common Learning Retention Methods



Stepping out of an LMS course and creating real-world experiences doesn't have to be a daunting task. When you're a small team or a team of one, and resources such as time are limited, you can lean on these concepts to make a big impact with little effort:

- **Knowledge checks.** Use these to drive individual awareness instead of evaluating competency. Some learning events should be a safe environment to practice, fail, and recover without consequences or feedback.
- **Gap training.** Use technology that's already in place to identify gap training needs. Conversation intelligence tools, internal

ticketing systems, and content management systems all provide valuable data.

- **Office hours.** Help promote open communication, foster teamwork, and ensure that individuals have an opportunity to connect with the relevant people within the organization.
- **Job shadowing.** This can be used to provide a realistic preview of the work environment, culture, and dynamics of a different team or role.
- **Mentoring for emerging leaders.** Match mentors and mentees based on their compatibility, areas of expertise, and the developmental needs of emerging leaders.
- **Podcasts.** Topics can include leadership skills, industry trends, internal tech stack, durable skills, and more. Podcasts allow employees to explore different areas of interest so they don't have to leave the organization for the knowledge.
- **Learning playlist.** This can serve as a road map or guide for learners, offering a curated collection of resources that support training and performance objectives in an engaging and personalized way.
- **Trade roles for a day.** This strategy allows employees to gain an understanding of and empathy toward a teammate's day-to-day activities.
- **Collaboration channels.** Use Teams or Slack to create niche channels for discussion, knowledge sharing, and FAQ identification. Channel topics could be anything such as competitors, objections, or tools.
- **Curator.** If you're fortunate to have the people resources to have a curator, prioritize them! Using a curator is a great way to capture legacy knowledge, ensure transfer across the organization, and make it consumable.

Overall, these resources are flexible and can be tailored to fit your organization's vision and current practices. Learners can engage with each of these at

their own pace and feel a sense of accomplishment. Accessibility is your secret weapon to making the reinforcement phase a success.

Establish a Clear Charter for Alignment

It is paramount to the success and growth of any organization to establish a clear and comprehensive charter for training and employee development programs that delineates the responsibilities of the talent development team and the managers you support. A charter is a guiding framework that ensures seamless coordination, efficient use of resources, and, most importantly, the development of employees with an everboarding strategy.

The talent development team is primarily responsible for onboarding new hires and providing them with the fundamental skills and knowledge required to excel in their roles. This includes introducing them to company policies, procedures, and basic job training. The talent development team can offer expertise in instructional design and delivery, assisting managers in implementing effective development plans for their teams.

Meanwhile, managers are tasked with the ongoing development of their direct reports, focusing on role-specific skills enhancement and fostering team assimilation. Managers can provide invaluable insights into the specific skill sets and competencies required for success on their teams. They can also help the talent development team tailor programs to meet these needs most effectively.

By clearly delineating these responsibilities, the charter eliminates ambiguity and ensures that neither party oversteps its bounds, leading to a more streamlined and effective training process. This collaboration ensures that talent initiatives are aligned with the strategic objectives of the organization and the developmental needs of individual employees and teams, maximizing their impact and value.

Your charter can set clear expectations for the talent development team and managers, holding everyone accountable for the successful onboarding and development of employees. By defining the metrics and benchmarks outlined in the charter, you can measure progress, identify deficiencies, and implement corrective actions promptly. This accountability fosters your

everboarding strategy because it ensures training initiatives and managerial support are constantly refined to better meet the evolving needs of the organization and its employees.

Your charter can also help you promote consistency and standardization across the organization. By outlining standardized processes and procedures for onboarding, manager involvement, and ongoing development, the charter ensures that all employees receive a uniform, high-quality training experience, regardless of their role or department. This consistency not only enriches and expands the efficiency of onboarding and ongoing development, but also reinforces organizational values of transparency and inclusivity.

Table 1-3 offers an example talent development team charter. Here's a list of what to include:

Mission statement:

- *Purpose and scope.* Provide a brief introduction defining the charter's purpose and scope, including the types of training covered (such as onboarding, manager coaching, or ongoing development) and the target audience (such as new hires, existing employees, or managers).

Training department responsibilities:

- *Onboarding.* Clearly outline the training department's responsibilities for welcoming new hires; introducing them to company policies, culture, and values; and providing initial orientation.
- *Basic job training.* Specify the training department's role in delivering the foundational knowledge and skills required for employees to perform their roles effectively, including technical skills, job-specific tasks, and compliance training.
- *Ongoing training program development.* Detail the training department's responsibility for designing, developing, and delivering training programs, ensuring they are relevant, engaging, and aligned with organizational objectives.
- *Evaluation and feedback.* Define processes for assessing the effectiveness of training programs, collecting feedback from

participants, and making necessary adjustments to improve future programs.

- *Performance.* Define the training department's role in assessing, guiding, and tracking employee performance.

People manager responsibilities:

- *Ongoing development.* Clearly outline managers' responsibilities for supporting the ongoing development of their team members, including identifying skills gaps, providing role-specific training and coaching, and facilitating career growth opportunities.
- *Team assimilation.* Specify managers' roles in integrating new hires into their teams, fostering a supportive and inclusive work environment, and promoting collaboration and teamwork.
- *Performance science.* Define managers' responsibilities for setting performance expectations, providing regular feedback, and supporting employee growth and development through performance evaluations and goal setting.
- *Collaboration and communication.* Establish channels for communication and collaboration between the training department and managers, facilitating the exchange of information, feedback, and best practices. Schedule regular meetings or check-ins to discuss training needs, progress, and any challenges or opportunities for improvement.

Additional components:

- *Metrics and evaluation.* Define key performance indicators (KPIs) and metrics for assessing the effectiveness of training initiatives and the impact on employee performance and organizational goals. Specify processes for collecting, analyzing, and reporting training data, including participant feedback, performance metrics, and training program evaluations.
- *Quality assurance.* Implement quality assurance processes to maintain the integrity and effectiveness of your training programs, including regular audits, reviews, and updates to training materials and processes. Consider including a content

governance strategy with representation from each team or department that your team supports.

- *Roles and responsibilities matrix.* Provide a clear matrix or table summarizing the roles and responsibilities of the training department and managers at each stage of the training process, from onboarding to ongoing development.
- *Approval and review process.* Keep it agile! Outline procedures for approving and updating the charter, including designated stakeholders responsible for review and approval. Establish a timeline or schedule for reviews and revisions to ensure the charter remains current and relevant to evolving organizational needs.

Table 1-3.
Example Talent Development Team Charter

Mission Statement	To empower employees at all levels to achieve their full potential through innovative learning experiences, continuous development opportunities, and strategic alignment with organizational goals.
Goals	<ul style="list-style-type: none"> • Equip employees with the skills, knowledge, and behaviors needed to drive business success. • Align talent development initiatives with organizational strategies to support scalability and long-term growth. • Enhance employee engagement and retention by providing meaningful development opportunities.
Scope and Supporting Tactics	The talent development team is responsible for designing, delivering, and managing all programs related to employee onboarding, learning, development, and leadership readiness. This includes new-hire orientation, professional skill building, performance enablement, and succession planning.
Stakeholders	<ul style="list-style-type: none"> • Receivers: employees • Supporters: senior leaders and hiring managers
Key Deliverables	<p>Next 6 months:</p> <ul style="list-style-type: none"> • Metrics dashboards for tracking learning participation, engagement, and outcomes • Quarterly updates to leadership on talent development progress and impact • Succession planning tools and talent pipeline reports

Table 1-3. (continued)

	6–18 months: <ul style="list-style-type: none"> • Comprehensive onboarding and everboarding programs • Customized learning pathways for specific roles, departments, and career levels • Leverage current technology investments for assessments and specialized training programs 	
Metrics	<ul style="list-style-type: none"> • Leading: engagement, time-to-proficiency, and manager involvement • Lagging: performance metrics, retention, and employee engagement scores 	
Talent Development and Leadership Alignment		
	What role does the TD team play?	What role does leadership play?
Content Development	Ownership of the ADDIE process	Subject matter expertise, need identification, and evaluation
Content Deployment	Onboarding, certifications, and product updates in the LMS	Support completion and participation
Training	Facilitation and assessment	Support completion and participation
Coaching	Role plays, group discussion, and assessment feedback	Day-to-day, performance reviews, and training reinforcement
Employee Feedback	Formal surveys at key tenure points	Casual, first-hand feedback shared with the talent development team for improvement

The establishment of your charter is instrumental for fostering the growth, development, and performance of both employees and your organization as a whole. By clearly defining roles and responsibilities, promoting accountability and collaboration, and ensuring consistency and standardization, your charter provides a guiding framework that empowers your team and managers to be more effective. This helps you nurture talent, drive performance, and achieve business objectives long after the onboarding phase.

Learning That You Can Scale

In this chapter, we debunked the myth that everboarding is merely a continuation of onboarding. Instead, everboarding fosters a culture of growth, integrating learning initiatives with talent management practices like performance management. The result is an environment where success is measured by progress and improvement, not just a willingness to learn.

Effective everboarding requires active involvement from talent development teams as partners, allies, and guides for managers and leaders. It is not a formal program but an ongoing effort to maintain conversations, collaboration, and alignment across teams. This chapter provides actionable steps to integrate your team into major business operations, becoming indispensable to the organization's success.

Onboarding is linear, but everboarding isn't. Think of it as a collection of personalized experiences that evolve along with the employee's journey. By gaining buy-in, participation, and support from organizational leaders, you can align efforts to implement the three phases of everboarding.

The onboarding phase remains foundational, setting the tone for an employee's growth. Through thoughtful design and seamless handoffs to managers, new hires develop confidence, good habits, and a learning-first attitude to enhance performance. The development phase builds on this foundation, shifting ownership to the manager and focusing on performance and continuous improvement. Finally, the refinement phase empowers employees to take charge of their growth while remaining supported by talent management systems.

Everboarding is more than just a strategy; it's a transformation of how organizations view and support employee development, ensuring every individual has the tools and opportunities to thrive beyond their first few weeks on the job.

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About the Author



Amber Watts has more than a decade of experience in talent development and sales enablement, specializing in everboarding, change management, and talent strategy. She is currently the founder and CEO of Radical Growth Works.

Passionate about empowering people to grow and bridging the gap between strategy and execution, Amber builds scalable systems that drive learning, leadership, and business growth. She challenges conventional thinking, fosters continuous development, and helps organizations create cultures in which employees and businesses thrive.

Amber holds a BS in business management and leadership and certifications in coaching and virtual training design. Her work has earned numerous accolades; she was recognized as an Emerging Training Leader by *Training* magazine (2019) and awarded a Stevie Award for Sales Training/Coaching Program of the Year (2020) and an Excellence in Learning Leadership from the ATD Nebraska Chapter (2023).

About ATD

atd The Association for Talent Development (ATD) is the world's largest association dedicated to those who develop talent in organizations. Serving a global community of members, customers, and international business partners in more than 100 countries, ATD champions the importance of learning and training by setting standards for the talent development profession.

Our customers and members work in public and private organizations in every industry sector. Since ATD was founded in 1943, the talent development field has expanded significantly to meet the needs of global businesses and emerging industries. Through the Talent Development Capability Model, education courses, certifications and credentials, memberships, industry-leading events, research, and publications, we help talent development professionals build their personal, professional, and organizational capabilities to meet new business demands with maximum impact and effectiveness.

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