

# Welcome!

- For each sheet on the wall, think about a leadership position in your organization
- Success Factors: What can help a leader be successful?
- Role Derailers: Pitfalls to be avoided
- Colleagues: People to know (by job title rather than name)



# The NeverEnding Story

Onboarding for Retention of  
Frontline Staff



# Chris Bulin

- Senior Website Support Coordinator at ITHAKA
  - Hired September 2014
  - Develop and coordinate onboarding and ongoing development for customer service staff at JSTOR, Artstor, and Portico
  - Member of the Association for Talent Development



Let the adventure begin



# What is Onboarding Anyway?

- “Onboarding progresses the recruitment and selection process. It embraces *orientation, training, coaching, and mentoring*.”

It involves *networking, along with product or service knowledge and brand awareness*. It’s neither a simple nor a short process but, done well, its value to the organization is substantial and long-lasting.” ([Little, 2018](#))

- All based on the assumption that you are hiring the right people for the right position

# Why does Onboarding Matter?

- Only **36 percent** of new hires believe that they've **received an accurate picture of what it's like to work at their organization.** ([Little, 2018](#))
- **33 percent** of new hires **look for a new job within the first six months** of starting a new job. ([Little, 2018](#))
- Organizations with a “standard” onboarding process experience a **54 percent increase in productivity** and a **50 percent increase in worker retention.** ([Little, 2018](#))

# Why does Onboarding Matter?

- **Seventy-one percent** of millennials who strongly agree that *they know what their organization stands for and what makes it different from its competitors* say they plan to **stay with their company for at least one year**. ([Dvorak & Pendell, 2018](#))
- It typically **takes eight months** for a newly hired employee **to reach full productivity**. ([Ferrazi, 2015](#))
- Some **69%** of job seekers in the study say that their **first-day experience will impact their decision to stay for more than a month**. ([Gelinias & Brennan, 2017](#))

If only it were this easy





# Onboarding Components

- Formal orientation program
- Clear job titles/expectations
- Coaching/mentoring program
- Team Assimilation
- New-hire workplace meetings
- Cohort assimilation
- Milestones/goal-setting
- Functional Training
- Management participation in program
- Tracking retention rates
- Ongoing training and education

# Where We Started

August 2016

1. User Services team overview
  - a. Stand-up, absence procedure, time off, reoccurring meetings, etc. (BL)(EM)
  - b. Wisdom of Brian (BL)
  - c. JSTOR History (BL)
2. Account and equipment set-up
  - a. Workstation (BL)(EM and BSYS)
    - i. <https://wiki.jstor.org/display/HelpdeskKB/Cisco+Phone++System>
  - b. Outlook (BL)(EM and BSYS)
    - i. <https://wiki.jstor.org/display/US/Outlook>
  - c. SugarCRM (TO to submit ticket)(TO and BSYS)(CB and BSYS)
    - i. <https://wiki.jstor.org/pages/viewpage.action?pagelId=164171974>
  - d. JIRA (Portico, CM, JSTOR, CSP) (TO to submit ticket)(TO)(CB)
    - i. <https://wiki.jstor.org/display/BS/JIRA+Introduction>
  - e. HR portals (Serenic, UltiPro, ConCur) (HR)
    - i. <https://wiki.jstor.org/display/US/Arcade%3A+Benefits%2C+Holidays+and+Other+Stuff>
    - ii. <https://wiki.jstor.org/display/US/Entering+Time+in+Serenic>
    - iii. <https://wiki.jstor.org/display/US/UltiPro+-+Requesting+and+Entering+Time+Off>
    - iv. Need Concur
  - f. Admin tools (JSTOR, Portico Auditor A&A- with Portico) (TO)(CB)
    - i. <https://wiki.jstor.org/display/US/BOLT>
    - ii. <https://wiki.jstor.org/display/US/Portico+-+WIP>
  - g. Proxy (non-authenticated) browser set-up (CB)
    - i. <https://wiki.jstor.org/display/US/Setting+up+your+proxy+browser>
  - h. PureChat
    - i. <https://wiki.jstor.org/display/US/PureChat>
    - ii. <https://wiki.jstor.org/display/US/Important+Features+of+PureChat>
    - iii. <https://wiki.jstor.org/display/US/Viewing+and+Joining+Chats+in+Purechat%3A+How+to+Spy+on+Your+Co-workers>
    - iv. <https://wiki.jstor.org/display/US/User+Services+Operator+Account>
  - i. Bookmarks (CB)
    - i. Need list of bookmarks
  - j. HipChat (CB)
    - i. <https://wiki.jstor.org/display/US/HipChat>
  - k. Wiki

# Iterated small parts over time

June 2017

## Outline of Topics with related content

1. User Services team overview
  - a. Stand-up, absence procedure, time off, reoccurring meetings, etc. (BL)(EM)
  - b. Wisdom of Brian (BL)
  - c. JSTOR History (BL)
2. Account and equipment set-up
  - a. Workstation (BL)(CB, Desktop Support, and BSYS)
    - i. [Cisco Phone System](#)
  - b. Outlook (BL)(CB and BSYS)
    - i. [Outlook](#)
  - c. SugarCRM (CB to submit ticket)(TO and BSYS)(CB and BSYS)
    - i. [Sugar and Spice \(but really just Sugar\)](#)
  - d. Zendesk (CB to setup account)(TO)(CB)
    - i. [Zendesk](#)

## Scheduling Topics and time

Week 1:

- Welcome and Overview (30 min)
- [Account and Equipment setup](#) (1-1.5 hours)
- About/Help & Support Pages (45 minutes)
- Welcome lunch (90 min)
- CRM intro 1 (1 hour)
- JSTOR Platform intro (1 hour)
- Snippets/Macros Overview (30 min)
- [Access Methods & BOLT](#) (1.5 hours)
- JIRA overview (1 hour)
- CRM intro 2 if needed (1 hour)
- Shadowing 1 (1 hour)

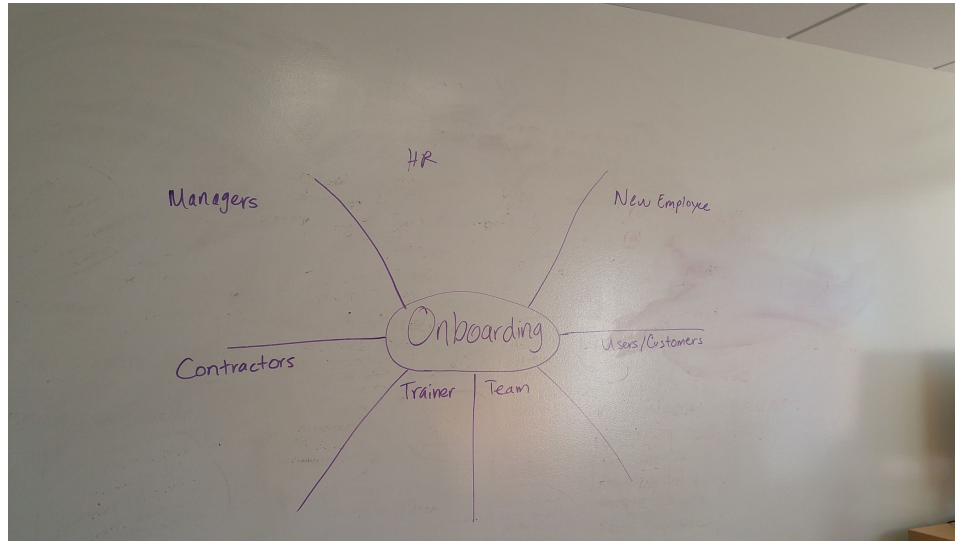
June 2018

The screenshot shows a Trello board titled "Onboarding Template" with a "Personal" and "Private" setting. The board is organized into columns representing different stages of onboarding: Pre-Day 1, Day 1, Week 1, Week 2, and Week 3. Each column contains a list of tasks with assignees and due dates.

Pre-Day 1	Day 1	Week 1	Week 2	Week 3
<b>HR</b> Offer Letter 0/1	<b>Manager</b> Welcome & Introductions 0/4	<b>Employee</b> <i>Update needed</i> Take the "Who's your User Services soulmate" quiz 0/1	<b>Manager</b> Lunch 0/4	<b>Employee</b> First Chat Shift 0/2
<b>Employee</b> Return Signed Offer Letter 0/1	<b>Other Dept</b> IT Overview with Desktop Support 0/4	<b>Employee</b> Check out the Who What Where Board 0/1	<b>Employee</b> Check out inside.ithaka.org 0/5	<b>Manager</b> 1:1 0/1
<b>Manager</b> Expectations Call 0/3	<b>HR</b> Office Tour and Form Collection 0/2	<b>Manager</b> 1:1 0/1	<b>Manager</b> 1:1 0/1	<b>Team Members</b> Accessibility Overview 0/1
<b>Manager</b> Request Accounts 0/3	<b>Culture Club</b> Lunch! 0/4	<b>Coordinator</b> CRM Intro I 0/12	<b>Team Members</b> Indl Access for JSTOR Part I 0/9	<b>Team Members</b> JSTOR Reverse Shadow 0/1
<b>HR</b> Schedule Info Sessions 0/7	<b>Coordinator</b> Account and Equipment Set Up 0/7	<b>Coordinator</b> 0/7	<b>Team Members</b> JSTOR Shadowing III 0/1	<b>Team Members</b> JSTOR Reverse Shadow 0/1

# Where to start: Needs Assessment

- It can be very difficult to create an onboarding program if you aren't sure what is needed and who is doing it
- Tool Demo:



# Pushing Ownership Down



# Pushing Ownership Down

- Set expectations with the whole team
- Let your subject matter experts cover the content they know
  - This may be within your team or in another department (IT, Marketing, HR, etc.)
- Assign a mentor/coach/buddy
- At ITHAKA over 6 weeks:
  - 34 items handled by team members
    - Includes functional training, shadowing, reverse shadowing
  - 13 items handled by other departments
    - Includes policies, procedures, paperwork, and department specific tools (like payroll!)
  - 9 items are self-directed
    - Includes review of information sites, watching videos, taking quizzes

# Where to Start: Best Practices

- Have everything prepared (computer, pens, notebook, etc.) so they can be productive on day 1
- Meet with the manager 1:1 in week 1 ([Klinghoffer, Young, Liu 2018](#))
- Define your success factors/milestones. Decide what you want your new hires to be able to do by the end of their first day, first week, first month, and first 90 days. ([Little, 2018](#))
- Provide performance expectations
- Paperwork bad, interaction good
- Recognize good work early
- SWOT/Strengths Finder
- Elicit feedback

# Slay the Beasts





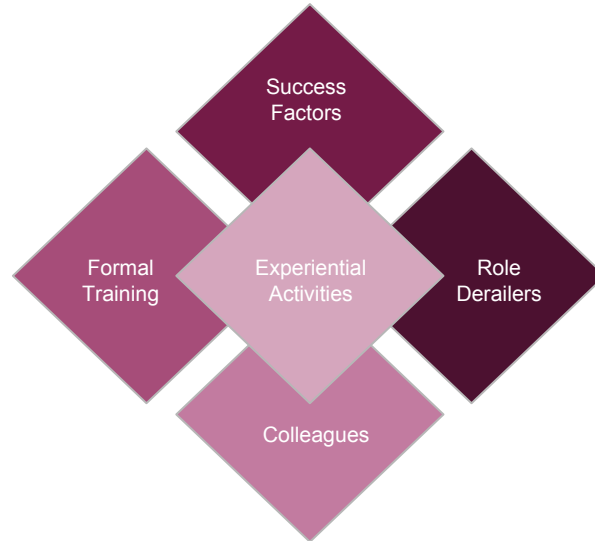
# Onboarding Models

- General Onboarding
  - The “Everyone has a Role” Model
  - Include all Stakeholders from the Needs Assessment
  - The timeline can expand & contract as needed
  - The Needs Assessment will determine the milestones

Who	Pre-Day 1	Day 1	Week 1	Month 1
Human Resources	Milestone 1	Milestone 2	Milestone 3	Milestone 4
Manager				
Employee				

# Onboarding Models

- Leadership Onboarding Framework
  - Identifies key factors that define success
  - Gives the new leader a clear path
  - Ultra adaptable to many levels, roles, and organizations



# Tools for Success

- Trello
  - Free and paid versions
  - [Example](#)
  - [Inspiration Boards](#)
- Wiki
  - Free and paid versions
  - [Example](#)
- G Suite
  - Free and paid versions
  - [Example](#)

# Tools for Success

- Free or low cost training methods
  - Mentor/Coach/Buddy
  - Swag
  - Scavenger Hunt
  - BuzzFeed Quiz
  - Lunch & Learn
  - Stickers
  - Webinars

# Aligning to Service

- What is your Customer Service Philosophy?
  - Do you set expectations for reply times?
  - Do you clearly outline what you can and can't help with?
  - Do you give your employees the tools to solve problems without escalation?
    - Policies about when it is [ok to say no](#) and how to do it
    - Explicit instructions for when it is [ok to break the rules](#)
    - A [guide](#) for the tone to be used across channels (email, phone, chat, SMS, etc.)
- If you don't have a Philosophy yet
  - Work with your team to build one
  - Allow members or subgroups of the team to use evidence and research to create a draft policy to bring to you or the group for discussion
  - This is a great way to incorporate strengths

# Aligning to Service

- Incorporate instruction on these policies, procedures, and guides in your onboarding schedule
  - Examples of what ITHAKA covers:
    - Style/Editorial guides
    - Working with difficult customers
    - Going above and beyond
    - QA and improving our service
- Be explicit
  - The same goes for culture of both the org and the team
- Put it in the schedule and devote time to it
- Especially important in entry level positions
  - If folks are just starting out they will need more guidance

# Make it Better



# Improving the Process

- Immediate Feedback
  - Trello Outcomes checklist
- Intermittent Feedback
  - Training Basics Check-In
  - Survey at week 2 and week 6
- Retrospective
  - Week 6
  - Focuses on processes rather than content
  - Can take many formats
    - What worked well/made you feel good/we should continue
    - What could be improved/made you feel bad/we should discontinue
    - What questions do you have/what are you unsure about



# Improving the Process

- Additional Metrics
  - Time to Productivity
  - Average Retention Time
  - In org transitions vs. offboarding
  - Customer Satisfaction
  - Employee Satisfaction/Engagement
- Ongoing Discussions
  - The Stay Conversation ([Dvorak & Pendell, 2018](#))
  - Career pathing
  - Consider job descriptions

# Ensuring Success



# Our Goal

- Belonging from minute 0
  - Time for socializing
  - Icebreakers
- Training Wheels
  - Social learning
  - Just-In-Time learning
  - Reverse Shadowing
- Follow-up
  - Maintain 1:1 conversations
  - Periodic check-ins with senior staff
  - Gather feedback from mentor/coach/buddy
  - Incorporate strengths in job duties and projects

# Your Goal?

- Share your thoughts on how you might use one of these tools or models going forward
- Share your best practices for onboarding
- Share your best low cost/free tools and training aids

Questions?

Thank you!



# Resources

Abend, C. (2018, March 01). Improve Your Customer Support By Breaking Your Own Rules. Retrieved September 26, 2018, from <https://www.helpspot.com/blog/improve-customer-support-by-breaking-our-own-rules>

Dvorak, N., & Pendell, R. (2018, August 09). Culture Wins When You Listen to Your Top Performers. Retrieved September 26, 2018, from [https://www.gallup.com/workplace/240545/culture-wins-listen-top-performers.aspx?g\\_source=link\\_NEWSV9&g\\_medium=TOPIC&g\\_campaign=item\\_&g\\_content=Culture Wins When You Listen to Your Top Performers](https://www.gallup.com/workplace/240545/culture-wins-listen-top-performers.aspx?g_source=link_NEWSV9&g_medium=TOPIC&g_campaign=item_&g_content=Culture Wins When You Listen to Your Top Performers), Gallup, Inc.

# Resources Continued

Ferrazzi, K. (2015, March 25). Technology Can Save Onboarding from Itself. Retrieved September 26, 2018, from <https://hbr.org/2015/03/technology-can-save-onboarding-from-itself>

Gelinas, J., & Brennan, T. (2017, July 31). Easy Onboarding Tips: Little Things Can Make a Big Impact. Retrieved September 26, 2018, from <https://www.glassdoor.com/employers/blog/easy-onboarding-tips-little-things-can-make-a-big-impact/>



# Resources Continued

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Lentz, E. T. (2016, February 04). 7 Tips on How to Say No to Customers. Retrieved September 26, 2018, from <https://www.helpscout.net/helpu/how-to-say-no/>

# Resources Continued

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Guide. (2015). Retrieved September 26, 2018, from  
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