



ONBOARDING IN A VIRTUAL WORKPLACE



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Agenda



PART 1: Onboarding in a Virtual Workplace
Knightsbridge Human Capital Solutions

PART 2: Panel Discussion

Bruce Markowitz, Unisys

Sandra Martins, Oracle

Marwa Jazi, Dell

PART 3: Summary and Wrap Up

Onboarding in a Virtual Workplace



Onboarding in a Virtual Workplace

- Onboarding can be one of the biggest factors in initial employee productivity and engagement.
 - ◆ Can take up to a year or longer for a new employee to reach full productivity. (2012 Allied Workforce Mobility Survey)
 - ◆ There are HIGH turnover rates within the first year:
 - ◆ 25% of all new employees turnover within a year (2012 Allied Workforce Mobility Survey)
 - ◆ Half of all senior outside hires fail within 18 months in a new position. (Smart, 1999)
 - ◆ Half of all hourly workers leave new jobs within the first 120 days.(Krauss, 2010)
 - ◆ Turnover costs companies 12%-40% of pre-tax annual income (PwC Saratoga Report, 2006).
- This is made more challenging as Tech companies move to a more virtual or distributed model.

Why Do We Care? The Benefits of Onboarding

It is good for the employee...

- Increased job satisfaction
- Increased career effectiveness
- Decreased stress

And the organization ...

- Decreased time to productivity
- Increased organizational commitment
- Increased job performance
- Increased customer satisfaction
- Increased retention (lower turnover)
- Increased recruitment potential (reputation)



References: Ashford & Black, 1996; Bauer et al., 2007; Bauer & Green, 1998; Fisher, 1985; Liang & Hsieh (2008); Wanberg & Kammeyer-Mueller, 2000

Levers of Success

- Build self-confidence (Saks, 1995)
- Provide role clarity (Feldman, 1981)
 - ◆ *Role ambiguity costs ~ \$37 billion US each year.* (Cordin et al)
- Minimize role conflict (Adkins, 1995; Bauer et al., 2007)
- Facilitate development of social networks (Morrison, 2002)
 - ◆ *One estimate suggests 60% of managers blame an inability to establish effective working relationships as the main reason for unsuccessful onboarding* (Fisher, 1985)
- Integration into the culture (Cooper-Thomas, vanVianen & Anderson, 2004)
- Encourage the employee to play an active role (Bauer, 2010)
 - ◆ *Water cooler chats, lunches, coffee breaks, participating in committees, proving their value, asking questions!*



The Virtual Workplace

- What does a virtual workplace look like?
 - ◆ Different office locations
 - ◆ Off-site work
 - ◆ Working from home/ telecommuting
 - ◆ Globally distributed offices
- Can be diverse in a number of ways:
 - ◆ Spatially
 - ◆ Temporally
 - ◆ Culturally

Even small levels of dispersion can substantially affect team performance.

(Siebdrat, Hoegl, & Ernst, 2009)



Framework for Discussion

Employee
relationship
starts here



1. Challenges
2. Advantages
3. Recommendations

Recruitment and Selection

CHALLENGES

- Finding the right fit for virtual work
- Assessing skills from a distance (e.g., increased travel, costs)

ADVANTAGES

- Can cast a broader net for recruitment
- Can take advantage of online assessment



Recruitment and Selection

RECOMMENDATIONS

- Have defined selection criteria for remote workers:
 - ◆ Interested in virtual work?
 - ◆ Reliable/dependable?
 - ◆ Technical savvy?
 - ◆ Internal vs. external to company?
 - ◆ Personality (Introverted/Extroverted)?
 - ◆ Communication skills?
- Conduct a rigorous assessment
 - ◆ Dual benefit: Selection and onboarding!
- Focus questions in reference checks around virtual work
- Provide organizational and role information before they officially start their role



Official Onboarding

CHALLENGES

- Developing trust
- Learning and sharing work practices
- Corporate culture
- Interpersonal relationships and team building

ADVANTAGES

- More objectivity for longer—a “critical eye”
- More attention paid and effort put into to the process



Official Onboarding

RECOMMENDATIONS

- Formal process, if possible
- Face to face, onsite orientation
- Facilitate meetings with key stakeholders
- Use instant messaging, email, voice conferencing, video conferencing and screen shares, to supplement face-to-face
- Adopt a structured approach to learning
- Ensure tacit knowledge is captured and conveyed
- Set up mentors and buddies
- Frequent check-ins and interactions
- Opportunities for social connection with other team members
- Continuous evaluation and refinement of onboarding process

Official Onboarding: F100 Coaching

PHASE ONE ACQUIRE CONTEXT	PHASE TWO BUILD AWARENESS	PHASE THREE CREATE INTEGRATION PLAN	PHASE FOUR DRIVE INTEGRATION	PHASE FIVE EVALUATE IMPACT
Acquire an understanding of the business and leadership context in which the leader will be operating, as well as critical integration challenges.	Build self-awareness (style and preferences) and situational awareness (opportunities and challenges of new role).	Create an <i>F100 Integration Roadmap</i> and monthly action plans to accelerate integration.	Put the <i>F100 Integration Roadmap</i> and monthly action plans to work and drive accelerated integration into the new role.	Evaluate impact and integration success, and capitalize on the benefits derived from the engagement.
KEY STEPS	KEY STEPS	KEY STEPS	KEY STEPS	KEY STEPS
<ul style="list-style-type: none"> Review relevant documentation to fully understand the business strategy, environmental context, and organizational leadership requirements for the new role Identify critical success factors and potential challenges Assess leader receptivity to coaching, and 'fit' with assigned Knightsbridge coach 	<ul style="list-style-type: none"> Complete leadership assessment Provide feedback to leader and link assessment results to opportunities and challenges Stakeholder interviews and analysis conducted by leader (with support of coach) <p>Value-add Option:</p> <ul style="list-style-type: none"> Coach to conduct key stakeholder interviews and prepare summary report 	<ul style="list-style-type: none"> Create high-level 100 Day strategy using the <i>F100 Integration Roadmap</i> Create monthly action plans month 1: build credibility month 2: secure early wins month 3: implementation Review <i>F100 Integration Roadmap</i> and action plans with organizational sponsor to get feedback, commitment, and support 	<ul style="list-style-type: none"> Conduct one-on-one coaching sessions based on <i>F100 Integration Roadmap</i> and action plans and linked to ongoing business issues <p>Value-add Option:</p> <ul style="list-style-type: none"> Facilitate a team meeting to accelerate the leader's ability to extract meaningful insights from feedback gathered 	<ul style="list-style-type: none"> Review impact and success and discuss the next plan needed to sustain momentum and drive results in the role Meet with organizational sponsor to review success to-date and ensure clarity of next steps and expectations 6-12 months later: Implementation of a follow-up 360° Leadership Effectiveness Analysis and feedback meeting
VALUE	VALUE	VALUE	VALUE	VALUE
Guarantees the goals and needs of both the leader and the sponsor organization are addressed, and ensures mutual understanding of what success looks like in the new role.	Ensures the leader understands the challenges and opportunities they are facing and how their personal style may impact their success.	Guarantees a systematic plan is in place to accelerate successful integration into the new role and lessen the likelihood of failure.	Ensures <i>F100 Integration Roadmap</i> and action plans are executed and goals are achieved. Each session provides greater insight into what is fundamental to the leader's success.	Ensures sustaining strategies are in place, provides for closure, and provides an understanding of the value of the coaching investment.

Retention

CHALLENGES

- Monitor performance
- Communication
- Dependency on technology
- Work life balance
- Interpersonal relationships and team building
- Isolation and exclusion
- Cultural differences

ADVANTAGES

- Efficiency
- Flexibility of time
- Autonomy and independence
- Can save money and time



Retention

RECOMMENDATIONS

- Guidelines for how to be successful working remotely
- Training on communication practices
- Guidelines for setting boundaries between work and home
- Regular company and departmental meetings (opportunities to connect)
- Periodic face-to-face meetings
- Performance management:
 - ◆ Focus on objectives and results (not time and process)
 - ◆ Status updates and feedback need to happen frequently (both ways)
- Emphasize team work skills
- Foster a global culture

Summary

- Even small levels of dispersion can substantially affect team performance
- Investing time in onboarding can save time, money, stress, and reputation
- Need to think about how virtual work impacts employees across the employment lifecycle
- Recruitment
 - ◆ Rigorous assessment with a focus on fit for virtual work
- Onboarding
 - ◆ Onsite, facilitate connection, ensure transfer of tacit knowledge, frequent check-ins
- Retention
 - ◆ Clear guidelines, regular communication, focus on results vs. time

Panel Discussion



Onboarding: The Good, The Bad and the Ugly

- Tell us about an onboarding process where...
 - ◆ ...it really worked. Why was it successful?
 - ◆ ...it really didn't work. Why was it not successful?

Added Complexity of a Virtual Environment

- What additional complexity is added when you are onboarding in a virtual environment?
- What steps did you take to counter these complexities?

Best Practices in a Virtual Environment

- What would you say are the most important things to do to ensure you get it right when onboarding a virtual employee?
- Do you assign mentors to work with, and to guide, the employee during the first year?
- How do you use referee input and assessments as part of the onboarding process?

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