

Onboarding & Integration with Intentionality: Building the Framework for Success

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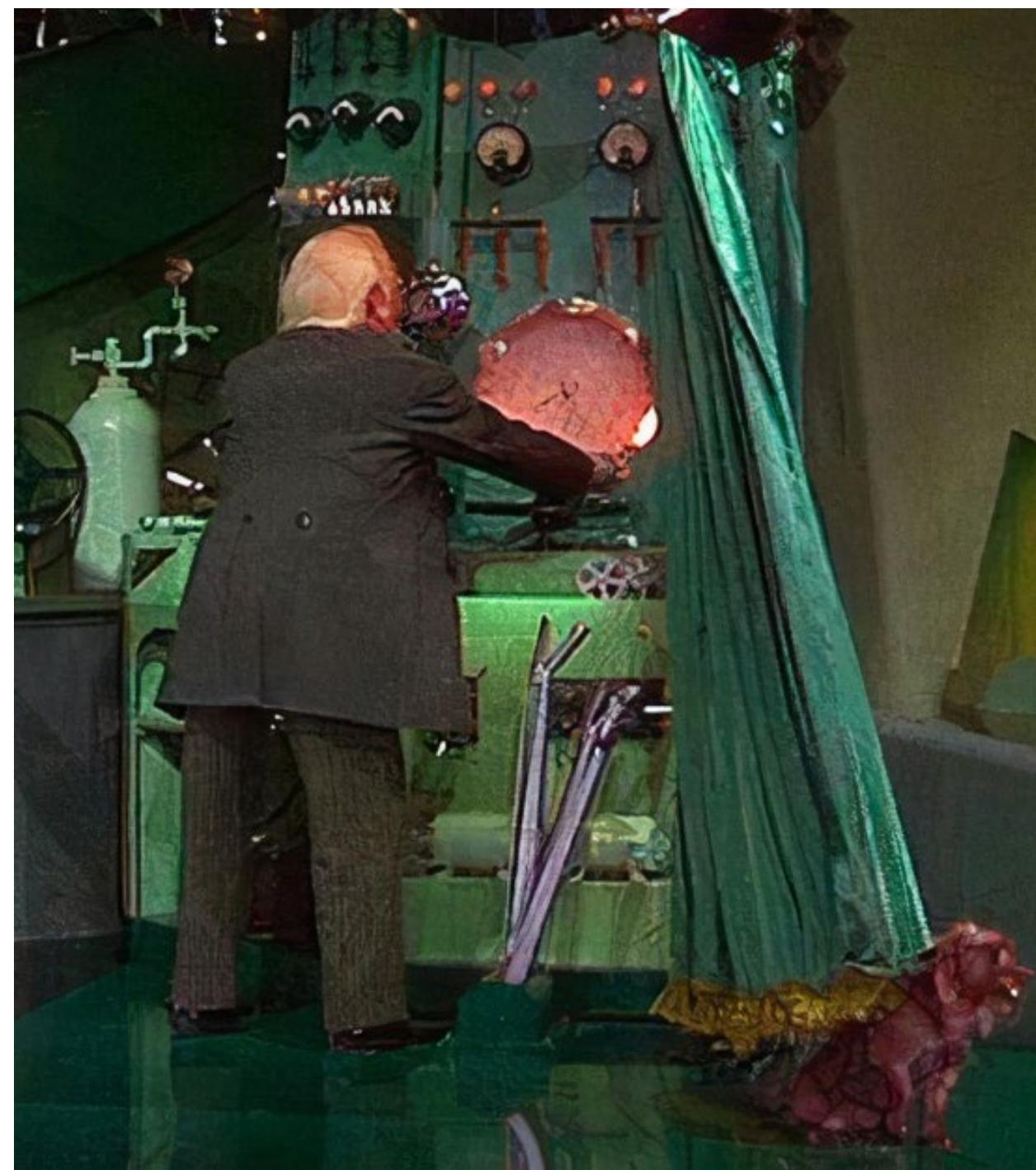
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Learning Objectives – The Framework



Review the Blueprints: Learn how to assess the current state at your organization. Can you build upon it?



Make the Purchase: Understand and communicate the “WHY” behind O&I to secure buy-in from key stakeholders in your organization.



Lay the Foundation: Review existing tools, systems, and software you already possess to help you outline metrics for success within your organization.



Build the Framework: Guide hiring managers in developing and documenting SOPs, best practices, mentor/buddy programs, and other foundational training needs.



Grab your Keys: Walk away with solutions and strategies to begin implementing at your organization to develop (or enhance) your O&I program!



Learning Objectives – The Intentionality



The “WHY” Behind O&I: What is Onboarding? What is Integration? How are they different? (And why should they matter to your hiring managers?)



Review the Roadmap: Learn what goes into crafting an exceptional O&I experience for each new hire, from the signed offer to the first day (and beyond).



Get Geared Up: Determine when and how the O&I process interfaces with other key teams and departments to keep things moving.



Plan the Strategy: Review tools and resources designed to help develop and cultivate your new hire over the first 90 days.



Celebrate Success: Cross the finish line with your new hire who’s now excited to grow their career with your company!



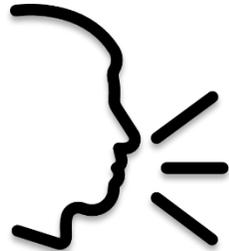
My Requests to You



Please be engaged! (i.e., please put phones and laptops away unless actively taking notes)



Please save questions (if possible)! I'll be providing dedicated windows of Q&A time.



I have a mild stutter! Thanks for your patience in case it becomes especially apparent. 😊





Review the Blueprints

Review the Blueprints

- What processes are currently in place at your organization?
 - Are they working? If so, why? If not, why not?
- Where and how are training resources being documented?
 - Standard Operating Procedures (SOPs)
 - Best Practices
 - Training Plans
 - Subject Matter Experts (SMEs)
- Have you conducted a SWOT Analysis?
 - Strengths, Weaknesses, Opportunities, Threats

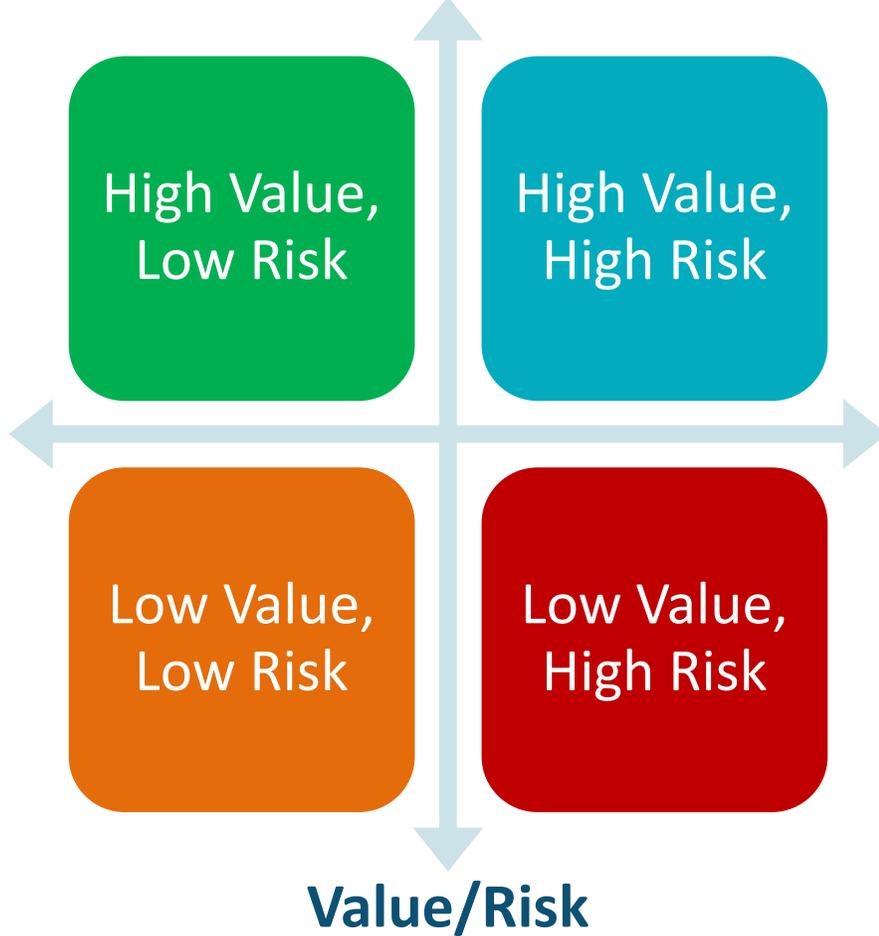
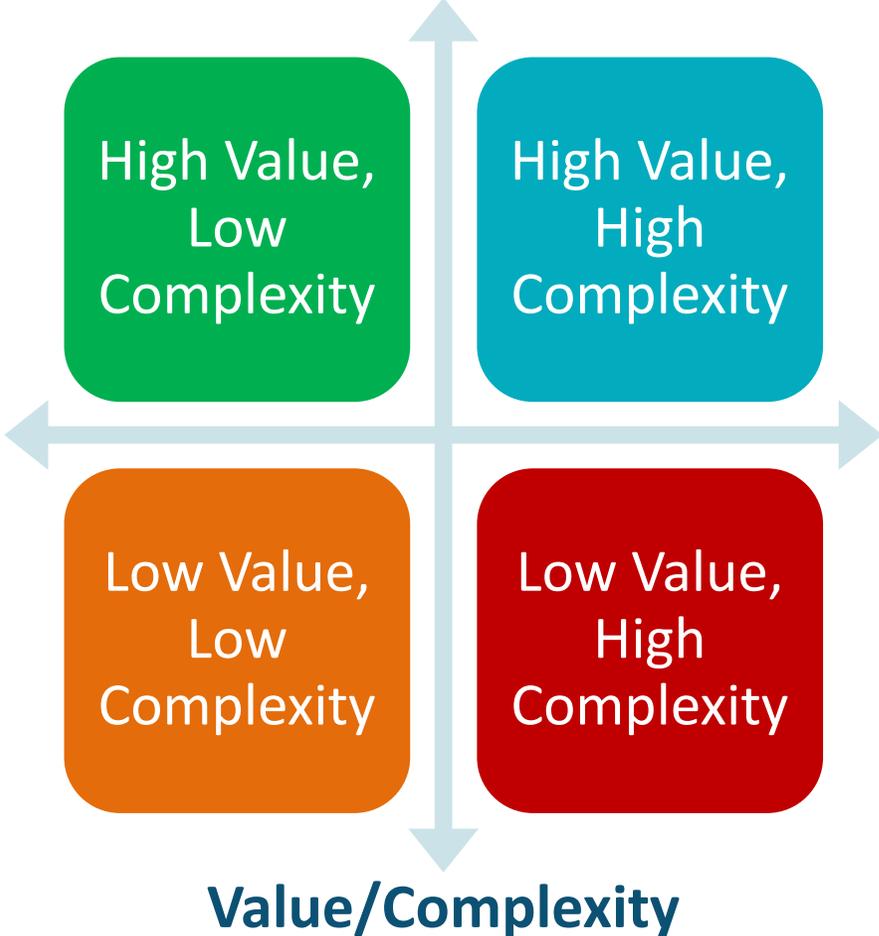


Review the Blueprints

- Do you want to:
 - Implement a new Applicant Tracking System (ATS) or Human Resources Information System (HRIS)?
 - Develop an internal buddy/mentor program?
 - Provide a dedicated O&I resource for new hires?
 - Create or enhance a structured feedback system (e.g., pulse surveys, 1:1s, check-ins)?
 - Prepare for a period of rapid growth (e.g., mergers & acquisitions)?
 - Modify your process to account for remote/hybrid work trends?
- Where does each goal fall **for your company** based on:
 - Strengths / Weaknesses / Opportunities / Threats?
 - Value vs. Complexity?
 - Value vs. Risk?



Review the Blueprints



Make the Purchase

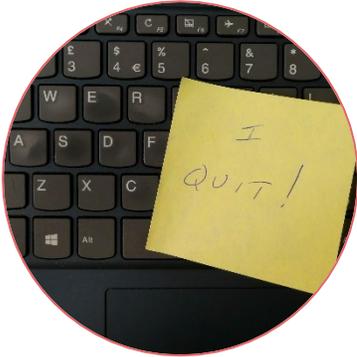


Make the Purchase

- It saves money!
 - [How Much Employee Turnover Really Costs You](#) – Inc.com
 - [This Fixable Problem Costs U.S. Businesses \\$1 Trillion](#) – Gallup
 - [HR Confronts the “New Normal”](#) – MindEdge/HRCI
 - [Key HR Statistics & Trends in 2023](#) – Forbes
 - [Turnover Cost Calculation Spreadsheet](#) – SHRM
 - [Guide to Turnover Costs: Definition & How to Calculate](#) – Indeed



Make the Purchase



Reduced Turnover



Cost Savings



Increased Productivity



Improved Engagement



Company Culture



Employer Brand



Make the Purchase

- Who are your **Sponsors**? Possible examples:
 - C-Suite & Senior Leadership
 - Accounting/Finance
 - Project Management Office (PMO)
 - IT Leaders
- Who are your **Advocates**? Possible examples:
 - Human Resources
 - Hiring Managers
 - Marketing/Sales Leads
 - Clients (Internal & External)



Make the Purchase



Data-Driven

Use facts, statistics, and evidence to persuade. It's most effective with analytical individuals who value concrete information and logical reasoning.

Structural

Use logic and structure to make a case systematically (problem → solution → action). It's effective with individuals who appreciate clear, well-organized frameworks.

Four Modes of Persuasion

Emotional

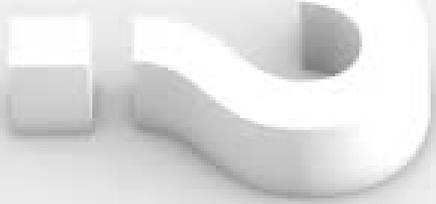
Appeal directly to feelings and values. Very effective with individuals who have (or can develop) a strong emotional investment in the subject OR the desired outcome.

Visionary

Inspire people with a compelling vision of the future. It's effective with individuals who are driven by big-picture thinking and future possibilities (e.g., trailblazers).



Questions?





Lay the Foundation

Lay the Foundation

- Explore How to Leverage Existing Tools
 - HRIS and/or ATS
 - Company Intranet or Portal
 - Widely accessible systems/software (e.g., M365)
 - Document Management Systems
- Begin to Identify Your SMEs
 - What are their core strengths?
 - Are they “mentor material”? If not, can we get them there?
- Establish a Formal Training Plan
 - Document SOPs and best practices
 - Confirm essential needs for the first two weeks, starting with Day 1
 - Look for opportunities to offer consistency!

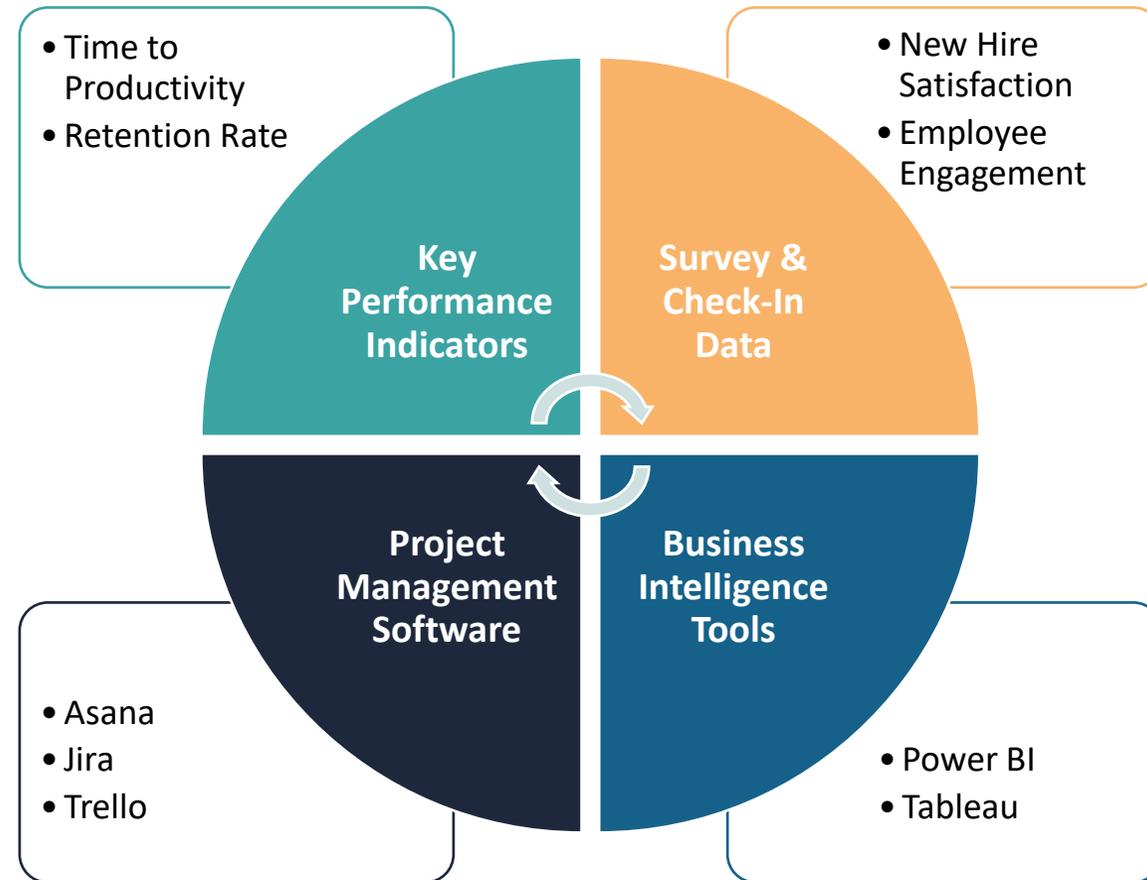


Lay the Foundation

- Collaborate with your advocates:
 - Human Resources
 - IT
 - Manager/Supervisor
 - Mentor/Buddy/SME(s)
 - Your Client(s)
 - Your New Hire
- Define your desired goals and outcomes for:
 - The first day
 - The first week
 - The first 30 days
 - The first 60 days
 - The first 90 days



Lay the Foundation



How are we measuring success? (And is it S.M.A.R.T.?)



A low-angle photograph of a wooden framework, likely for a building or structure, set against a clear, bright blue sky. The wooden beams are light-colored and arranged in a series of vertical and horizontal lines, creating a sense of depth and structure. The perspective is from below, looking up at the framework.

Build the Framework

Build the Framework

- Identify Key Tasks & Responsibilities
 - A.k.a. “Role Clarity”
 - **HINT:** These should align with the Job Description!
- Involve Team Members & SMEs
 - I.e., the people who are likely on the front lines and doing the work
 - Especially important for establishing SOPs & Training Plans
- Use Visuals, Templates, and Checklists
 - Examples of visuals can include diagrams, flowcharts, screenshots, and/or videos



Build the Framework

- Create a Training Schedule
 - Start with a Day 1 Agenda
- Use a Mix of Training Methods
 - E.g., on-the-job training, online training, and mentoring
 - This also caters to different learning modalities (visual, auditory, kinesthetic)
- Include a Feedback System
 - E.g., Google/M365 Forms, SurveyMonkey
- Review and Update Regularly
 - We want to keep our methodology relevant and effective!





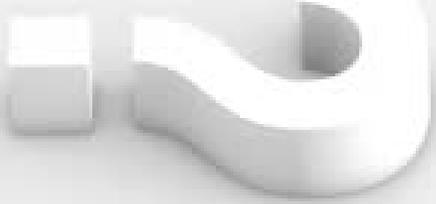
Key Takeaways – Framework

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- Pick the top **high-level goal(s)** you want to achieve with your own personal O&I program based on their **value**, their **complexity**, and their **potential risk**.
 - What problem(s) are you trying to solve?
 - Will they play to your **strengths** or give you an **opportunity** to amplify your brand?
 - Will they help address **weaknesses** or mitigate competitive **threats**?
- Identify all the **existing tools** in your arsenal before sinking money/labor into implementing new ones, especially if you are having to **do more with less**.
 - Who are your **advocates** who can help you?
 - Have you established a solid rapport with your **IT team**? If not, make this a goal!
 - Setting **realistic** metrics for success will help you identify **attainable** solutions!



Questions?



The “WHY” Behind O&I





The “WHY” Behind O&I

- **Onboarding** includes everything from the moment an offer is signed up through the employee’s first day.
- **Integration** includes everything beyond the first day and is necessary to ensure long-term success and engagement.
- Another way to frame it:
 - Onboarding gets the new hire in the door, but Integration is what makes them want to stay.
 - Two sides of the same coin – but the distinction between them is crucial!



An aerial photograph of a red running track with white lane markings. Several runners are captured in motion, their dark silhouettes contrasting against the track. The text "Review the Roadmap" is overlaid in white on the right side of the image.

Review the Roadmap





SIGNED OFFER

Identify Anticipated Start Date
Background & Reference Checks
New Hire Has Given Notice

Talent Acquisition works with hire on all necessary pre-employment steps

ONBOARDING & INTEGRATION

SAMPLE HIRING HOURGLASS

Pre-Hire Paperwork
Internal Hire Notices

Once all pre-hire checks are cleared, O&I Team works with Manager/Supervisor to generate internal notices, IT tickets, training plans, etc.

(This step is **ideally** done at least 7-10 business days prior to the hire's arrival)

HUMAN RESOURCES

Complete New Hire Setup in HRIS

Initiated once hire completes pre-arrival paperwork

IT & OFFICE SERVICES

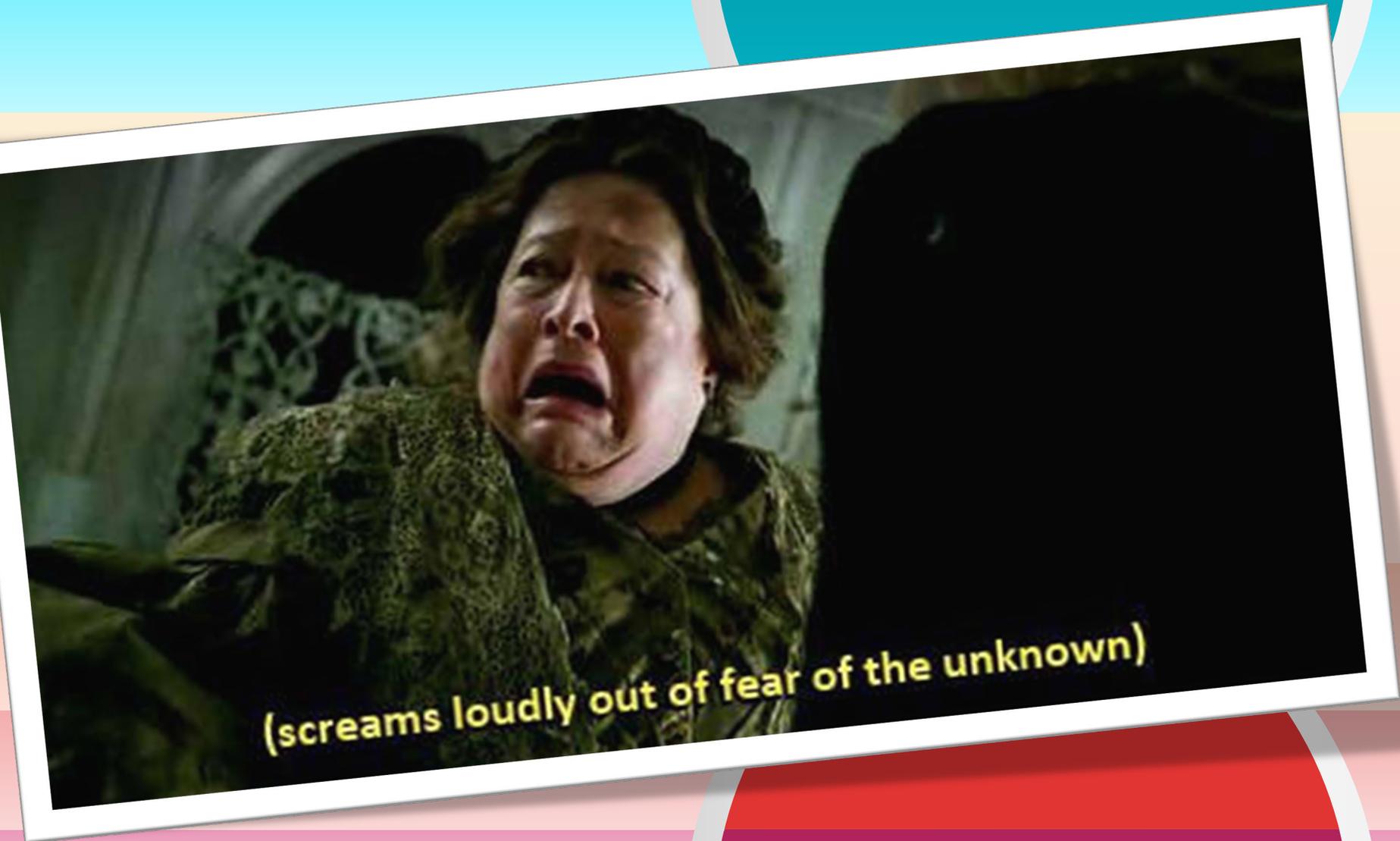
Profile User Accounts & Deploy Equipment

IT sets up onsite workstation or ships setup for remote workers

FINISHING TOUCHES

Provide O&I Outline & Prepare for Arrival

Includes any remaining steps handled at the local/office level



(screams loudly out of fear of the unknown)

(This step is **ideally** done at least 7-10 business days prior to the hire's arrival)

Get Geared Up

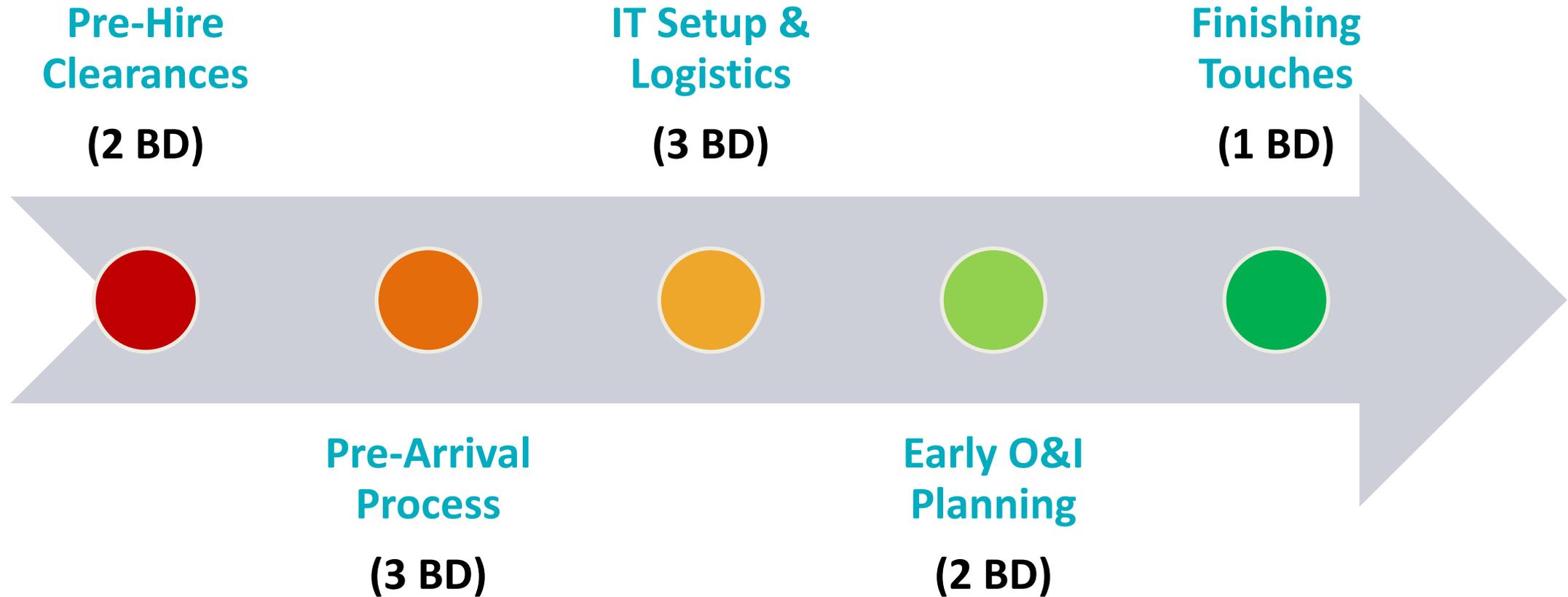


Get Geared Up

- What role does the **Manager/Supervisor** play?
 - 1:1 Connection
 - Access to Tools, Resources, and Support
 - Workflow Management
- What role does **IT** play?
 - Physical Hardware (e.g., laptop & peripherals)
 - Systems & Software
 - Is your new hire Hybrid or Remote? Does IT know?
- What role does **Human Resources** play?
 - Pre-Hire Clearances (e.g., background checks)
 - Pre-Arrival Logistics (e.g., building access, parking)
 - Day 1 Logistics (e.g., I-9 verification)



Sample O&I Timeline **Assuming Everything Goes Perfectly**

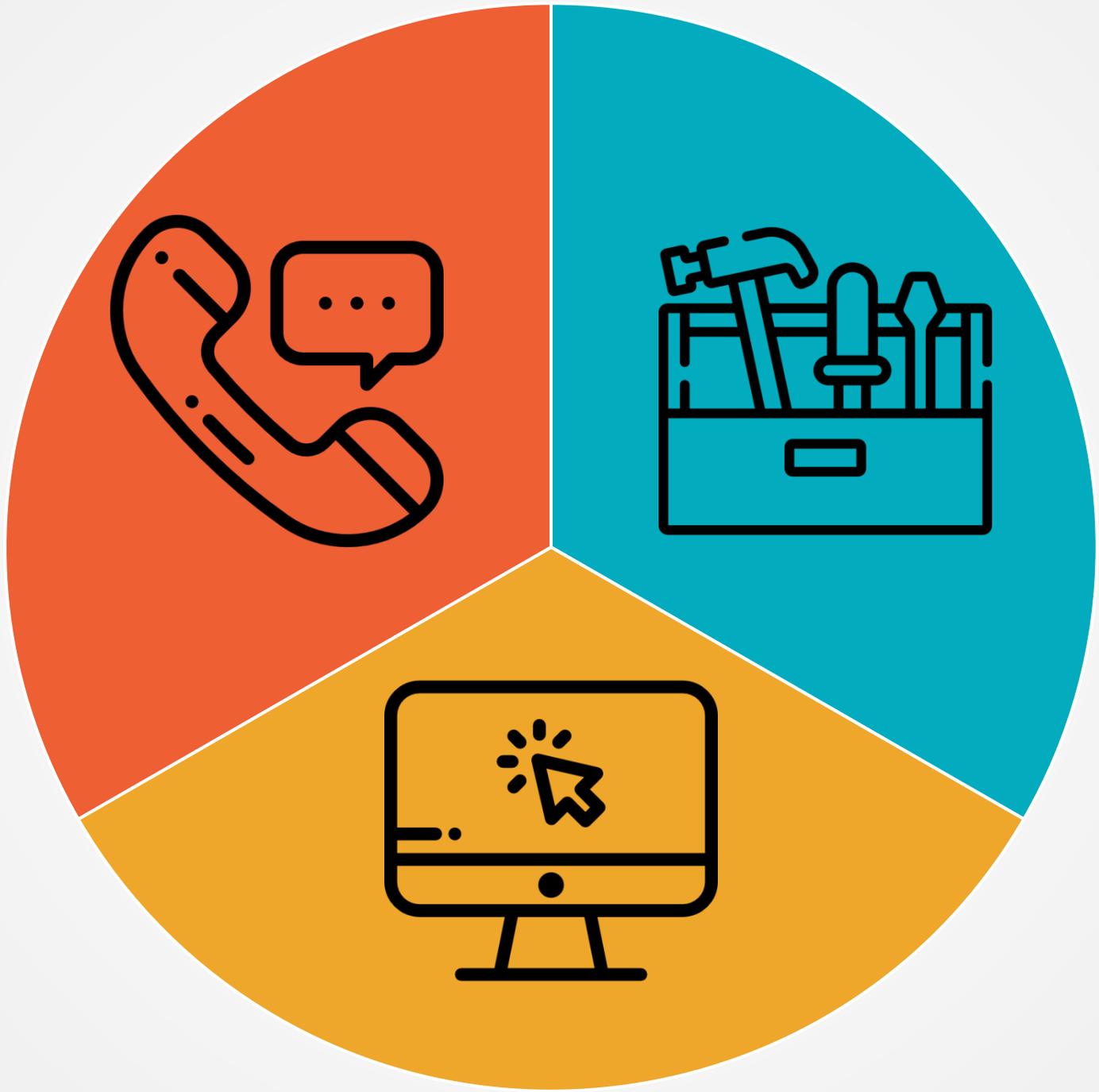


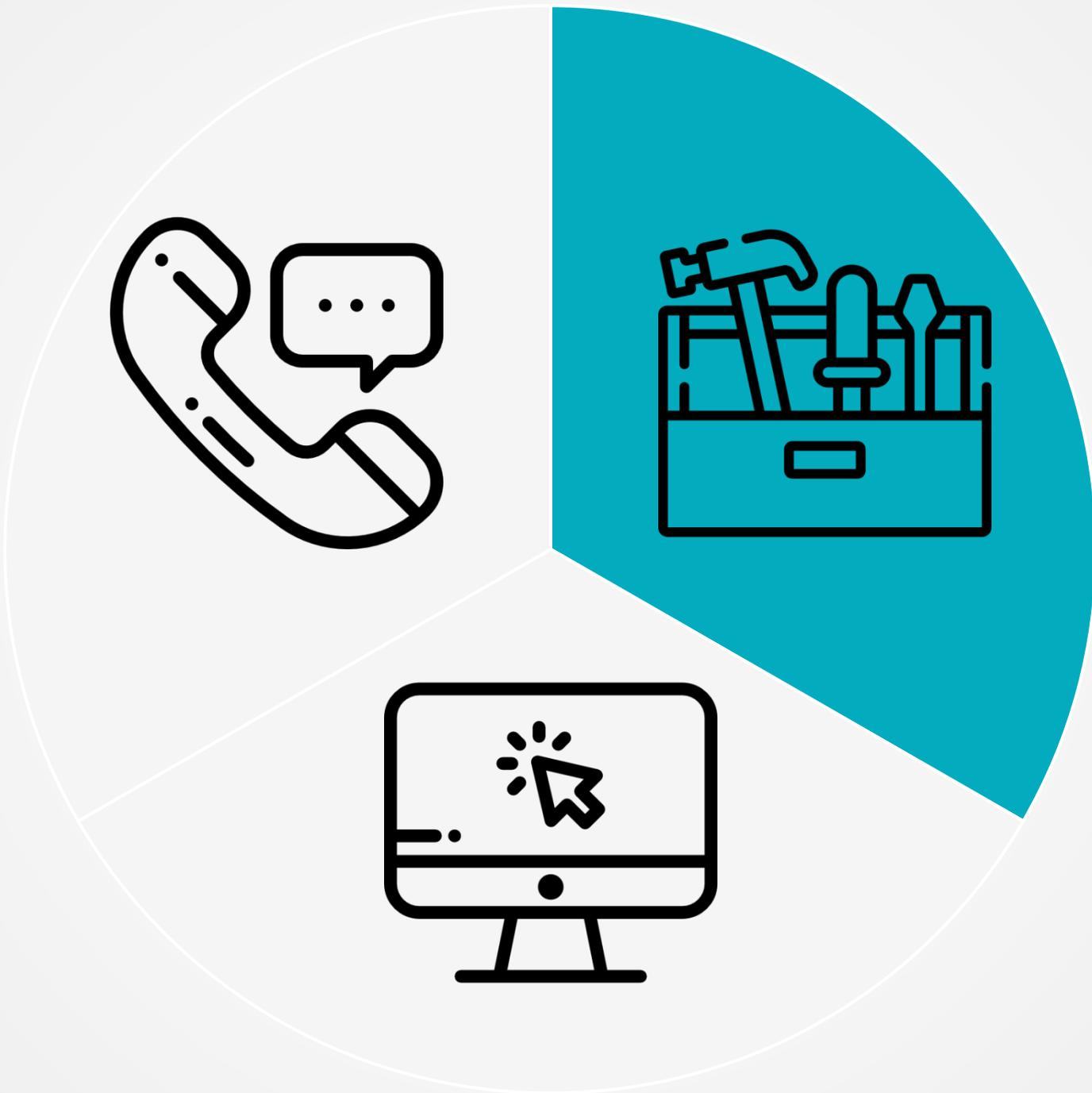
BD = Business Days



Plan the Strategy

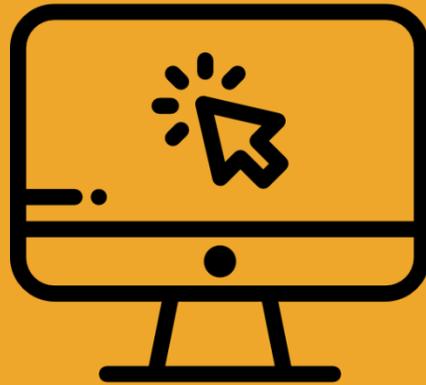






WHAT
do I
USE?





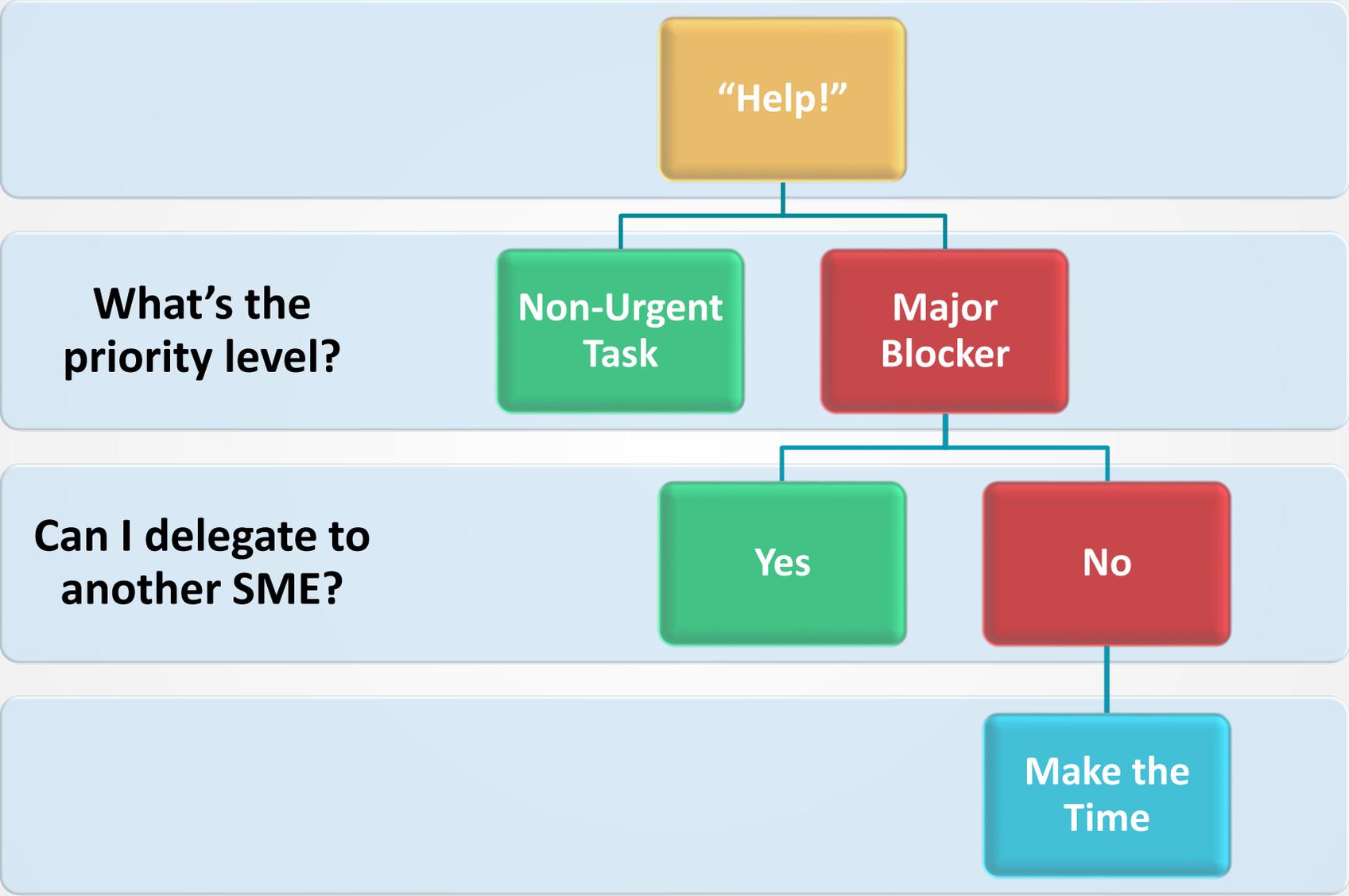
WHERE

do I **GO**?



WHO
do I
CALL?





Plan the Strategy

- Starting a new role is like driving a new car – It can be very similar AND very different!
- Think about **what *this* new hire needs** to be successful based on:
 - Experience & Skillset
 - Access to Tools/Resources/Support
- Every single new hire can benefit from us answering these questions before Day 1:
 - **WHAT** do I **USE**? (*Tools*)
 - **WHERE** do I **GO**? (*Resources*)
 - **WHO** do I **CALL**? (*Support*)



Plan the Strategy

- When are the Critical Milestones?
 - End of First Day
 - End of First Week
 - End of First Two Weeks
 - End of First 30 Days
 - End of First 60 Days
 - End of First 90 Days
 - Mid-Year Check-In
 - Year-End Review



30-Day Check-In – Sample Approach

- Have your job duties and responsibilities **aligned with your expectations?**
- Do you feel like **you have the tools, resources, and support** to be successful?
- **Are you feeling challenged** by your role? Why or why not?
- How **has your supervisor been engaged** in your early integration?
- **Have there been any roadblocks** in performing the work expected of you?

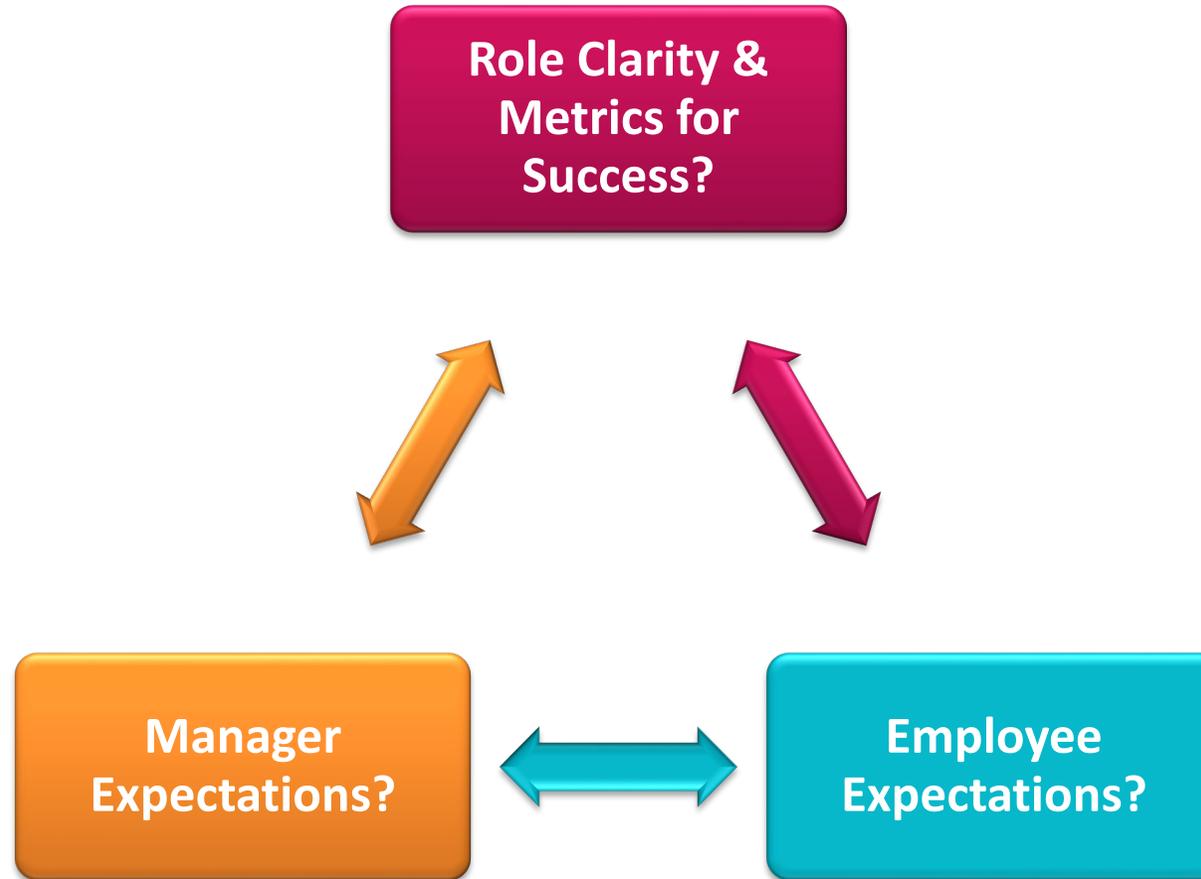


90-Day Check-In – Sample Approach

- **How are you doing?**
- Do you feel that **the work you're putting out contributes** to your team? What about towards our company's strategic vision?
- Have you **identified any opportunities** you (or your team) should consider exploring?
- Do you have any **personal/professional goals you want to achieve** in the next 3/6/9 months? How can we support you in the pursuit of these goals?



Are We Missing...





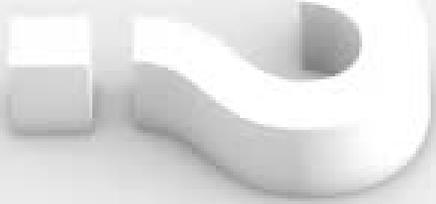
Key Takeaways – Intentionality

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- Remember that **we're hiring humans!**
Each hiring experience is unique to that individual's specific needs, and your **“baton passes”** may reflect that.
 - Who is part of your **Onboarding** track leading up to a new hire's first day?
 - Who tags in to help support longer term **Integration** efforts beyond the first day?
 - How can you offer a stellar O&I experience **without cutting corners?**
- **Intentional connections are crucial** to the early success and development of your new hires! Identify the **critical milestones** you'll commit to recognizing.
 - What **tools, resources, and support** do new hires have along the way?
 - Are you asking questions designed to **aid personal & professional growth?**
 - How do you **collect feedback** and how will you convert it into **meaningful outcomes?**



Questions?



THANK YOU!



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