

MANAGER ONBOARDING

5 Steps to Designing a Program that Will Make New Managers Successful



Organizations want to spend time growing their business. They want to hire employees because demand is increasing or they're expanding into new markets. Companies want to hire talent proactively, not reactively. That's why there's concern about recent statistics on turnover.

More than half of all employees who left their job last year did so within the first twelve months, according to Equifax Workforce Insights. Turnover is expensive. The Society for Human Resource Management (SHRM) reports that the average cost per hire is \$4,129 and time to fill is 42 days. This isn't how companies want to spend their time – and money.



There's no getting around the fact of voluntary turnover – it happens. And not all turnover is bad. But recurring turnover isn't good for the business. It means too much knowledge is walking out the door.

The answer is to set new hires up for success with onboarding.

The onboarding process is responsible for integrating new employees into the organization. It starts even before an employee applies, because setting expectations is a part of integration. Onboarding includes paperwork, orientation, training and performance coaching. It also involves providing new hires with the knowledge and skills they will need to do their job well.

This same philosophy applies to management. If organizations want employees to be successful, they need to have successful managers. Sure, human resources is responsible for some of the onboarding process, but not all. Most onboarding activities fall to managers.

MANAGER ONBOARDING IS ABOUT GIVING NEW MANAGERS A WAY TO INTEGRATE INTO THE ORGANIZATION, WHETHER THEY WERE HIRED EXTERNALLY OR FROM WITHIN.

Managers need to have an excellent onboarding experience to be able to deliver the same to their employees. Manager onboarding is about giving new managers a way to integrate into the organization, whether they were hired externally or from within. It gives them the tools, knowledge and skills to do a good job and help people they manage to be their best.



MANAGER ONBOARDING ISN'T THE SAME AS MANAGEMENT DEVELOPMENT

The organization is responsible for developing managers and HR plays a critical role in this process. Many organizations make it possible for high-potential and high-performing employees to develop their skills in anticipation of future management openings. They can take part in programs including leadership development, problem solving, decision making, etc. These opportunities bring a positive return-on-investment (ROI) for the organization.



MANAGER ONBOARDING SHOULD FOCUS ON THE AREAS THAT THE INDIVIDUAL NEEDS AT THE POINT THEY BECOME A MANAGER.

However, manager onboarding isn't the same thing. It doesn't make sense to provide manager training on many topics until they're going to use it. For example, you wouldn't conduct training on how to review an employee's hours of work in the company's timekeeping system until you actually have employees to review. Otherwise, the manager could forget and need to repeat the training.

So, management and leadership development is the perfect way to give employees skills and knowledge they can use immediately and carry into a new management role.



Here are four examples of topics to consider for a manager onboarding program:

- 1. PROJECT MANAGEMENT.** Employees at all levels in the organization are involved in projects. However, being a project leader often falls to managers. New managers need to be able to lead the development of S.M.A.R.T. goals, create project budgets, conduct meetings, and properly debrief activities.
- 2. EMOTIONAL INTELLIGENCE (EI).** Strong working relationships are critical to a manager's success. New managers may not yet have the emotional intelligence skills that are the basis of strong relationships since they're often hired or promoted based on their technical expertise. Competence is important but so is having emotional intelligence. It's the ability to perceive emotions to promote intellectual growth. Dr. Daniel Goleman identified five components to EI: self-awareness, self-regulation, internal motivation, empathy, and social skills.
- 3. MINDFULNESS.** An increasing amount of research shows that the practice of mindfulness changes how individuals engage with others. It decreases the "knee-jerk reactions" and helps create logical thought and focus. Organizations might choose to offer mindfulness as part of a wellness or well-being initiative to all employees or support leaders in developing their mindfulness skills.
- 4. HR/EMPLOYMENT LAW.** The human resources department cannot be everywhere all the time. Managers play a huge role as the first place employees go to ask questions about leaves of absence, benefits and more. Since managers are representatives of the company, it makes good business sense to give them some background in employment law and how to handle employee questions.

The list of topics included in a manager onboarding program will vary by company and industry. Organizations can develop their own topics after completing an organizational assessment.

HOW TO CREATE A MANAGER ONBOARDING PROGRAM

When it comes to instructional design, one of the most popular frameworks is the ADDIE model (assessment, design, development, implementation, evaluation). The ADDIE model can be used as the guide for creating a manager onboarding program.

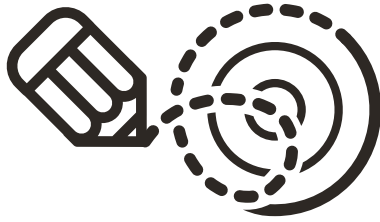


STEP 1 – ASSESSMENT. The purpose of this step is to establish the current state and desired state, which highlights the gap that needs to be addressed by the program.

Resist the urge to say “everything” when it comes to the desired state. It’s perfectly normal to have a long list of goals for your manager onboarding program. The key is to prioritize them. Start small with activities that can have a big impact. Plan to implement activities over time. You might create a new manager orientation to start and add a manager mentoring program later.

The current state can be determined using several methods including performance reviews, surveys, exit interview questionnaires, and focus groups. This is also the perfect time to conduct a potential audience analysis.

Gather information about the current manager population, e.g., educational background, work experience, and technology skills. It will be helpful during the assessment phase and could be valuable when making decisions about program delivery methods.



STEP 2 – DESIGN. Using the information from step one, the program goals are established.

The design step finalizes the content for the program. Even though the step is called design, we're not creating materials yet. First, we need to make sure the content aligns with the principles of adult learning. It should be actionable, practical and relevant.

This is the time to decide how the program will be delivered, i.e., in-person, online, or blended. The audience analysis in step one will help with these decisions.



STEP 3 – DEVELOPMENT.

This step involves creation of the program materials.

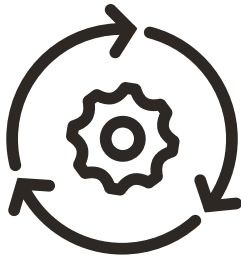
There are two paths that organizations can take for development: internal or external. There are pros and cons to each.

In-house material development is terrific when organizations have the resources available and people with skills to do the work. They know the organization and company culture. This can also be less expensive than using outside resources.

The challenge of developing materials in-house can sometimes be making sure the work stays on track for completion. New priorities come up and the manager onboarding program is moved down on the list to make room for more urgent needs.

Using external resources can help keep the manager onboarding project on track. It's possible that a third-party resource has developed similar programs and can bring new, creative ideas to the process. The downside can be cost, unless the organization has an ongoing relationship with an instructional design freelancer.

One method to consider is a combined approach of resources. Is it possible to use a combination of off-the-shelf and custom design resources? This may help you get maximum benefit and keep the project on track and on budget.



STEP 4 – IMPLEMENTATION.

This is the most visible step in the entire process.

It's very exciting to launch a new program and new managers will be eager to participate, but it's prudent to take a couple of extra steps.

Pilot programs allow human resources to test the program on a small group before implementing company-wide. This can help with getting support from key people.

The pilot group is responsible for providing participant feedback, such as:

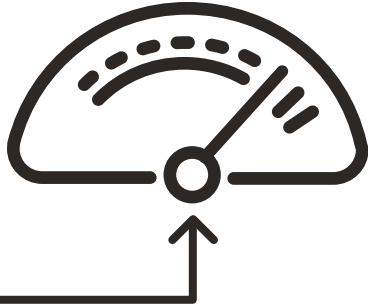
- Was the content relevant?
- Could I immediately apply what I learned on the job?
- Logistics – session length, activity effectiveness, etc.

Once the pilot group has provided feedback, the instructional design team can make final revisions to the program.

Another approach is to phase-in the manager onboarding program by department or location. This is especially helpful if the organization wants to onboard groups of existing managers. Here are a couple of examples:

- You could invite every manager who has been in their role one year or less to participate.
- Departments could choose to use manager onboarding as a team building exercise.

A good implementation demonstrates commitment to manager onboarding that will be reflected in the final results.



STEP 5 – EVALUATION.

The manager onboarding program will need to be evaluated on whether it's accomplishing business goals and the objectives set out in step 2.

There are two ways to evaluate a program – quantitative and qualitative:

- **QUANTITATIVE** methods include Kirkpatrick levels, cost per hire, and turnover. If the manager onboarding program is initially an orientation-type session, using Kirkpatrick's levels of evaluation could make sense. Manager onboarding programs should reduce manager turnover and, in turn, reduce the cost of hiring more managers.
- **QUALITATIVE** methods include stay interviews, focus groups and surveys. New managers need to spend time with their immediate supervisor. During these meetings, find out why managers enjoy their job, what makes them stay and whether they feel they're getting the resources they need to be successful. The stories and comments be useful in talking about the program and new managers will appreciate having their direct feedback solicited.

We often focus only on the numbers. However, it may make sense to use both quantitative and qualitative methods when sharing program success. This shows how stories and testimonials from managers support the numbers.

PROGRAM MAINTENANCE DRIVES QUALITY

Your manager onboarding program has been implemented, so you're all done, right? Not quite. Regular reviews using evaluation data will help you decide how to change and enhance. You need to make two key decisions about program maintenance:

- **HOW WILL PROGRAM MAINTENANCE TAKE PLACE?** Your organization needs to decide who will be responsible for updating materials and how those updates will take place. You might want to use your existing naming convention and distribution method of policies and procedures. If you don't have a formal process for version control, the company needs to inform people how they can identify the most current materials.
- **HOW CAN PARTICIPANTS STAY RELEVANT?** This is a content discussion. As the program is updated, how do managers who aren't in the program receive updated information? Your organization can run refresher sessions or develop an online library that managers can reference.

It's essential to have conversations about program maintenance throughout the design process. You don't want to create a manager onboarding program you can't maintain.



INVESTING IN MANAGERS IS AN INVESTMENT IN THE FUTURE OF THE COMPANY



Developing a manager onboarding program shows new managers the organization supports them and has a vested interest in their success.

It doesn't replace a leadership or management development program. Instead, it provides new managers with the skills they need day one of a new management position.

Like any program, manager onboarding needs to be created using proven instructional design practices. The time and effort spent planning the program will be immediately noticed during implementation and it will show in the program results.

New managers who are properly onboarded will be engaged with their work and able to effectively engage others. They'll be empowered and productive. And the organization will benefit from a healthy bottom-line.

ABOUT THE AUTHOR

Sharlyn Lauby is the [HR Bartender](#), whose blog is a friendly place to discuss workplace issues. HR Bartender has been recognized as one of the Top 5 Blogs Read by HR professionals by the Society for Human Resource Management (SHRM). When she's not tending bar, Sharlyn is president of ITM Group, Inc., which specializes in training solutions to help clients retain and engage talent. She is the author of [Essential Meeting Blueprints for Managers](#) and [Manager Onboarding: 5 Steps for Setting New Leaders Up for Success](#) which are available on Amazon.

