

Assessing the State of Executive Onboarding

Michael Watkins

Following the publication of “Onboarding Isn’t Enough” in the May-June 2017 issue of the *Harvard Business Review*, we launched our [Organizational Onboarding Effectiveness Assessment](#) to explore the state of executive onboarding practices in companies of varying sizes. Publicized through our social media connections and by the IMD Business School, the assessment drew more than 100 responses from leaders at firms with more than 500 employees, as shown in the table below.

Number of employees	Number of responses
10K +	50
2500-9999	21
500-2499	31

Based on the onboarding framework developed for the “Onboarding Isn’t Enough” research, the assessment asked respondents to identify which elements of best-practice onboarding systems are and are not deployed by their companies. The rows of the matrix, shown below, denote five core transition tasks that newly-hired executives need to complete (see Appendix A). The columns of the matrix correspond with three observed “levels” of onboarding support – basic orientation, active assimilation, and accelerated integration (see Appendix B). Participants also responded to questions about the existence and overall effectiveness of their companies’ executive onboarding systems.

Elements of Best-Practice Onboarding Systems

Core Tasks	Levels				
	Basic Orientation	Active Assimilation		Accelerated Integration	
Diagnosing the Situation	Operational plans for the business	Structured introduction to key business areas	Visits to key company locations	Opportunities to sit in on critical business meetings before Day One	Immersive experiences in unfamiliar areas of the business
Taking Charge of the Team	Career histories for team members	Performance and/or assessment data	Briefings to provide confidential insights on team members	Briefings on team dynamics and history	Facilitated introduction workshop with the team

Aligning with Stakeholders	Organizational charts	List of key internal stakeholders	Planned introductions to key stakeholders	List of key external stakeholders	Briefings on stakeholders and their agendas
Understanding the Culture	Statement of company purpose and values	Briefing on culture and ways of “getting things done”	Structured events to help get deeper insight into the culture	A “cultural interpreter” to provide insights	Assessment to highlight differences between current and former cultures
Shaping Strategic Direction	Business plans	Strategic plans	Planned discussion with key stakeholders on strategy	Participation in an off-site strategy meeting	Dedicated workshop on developing strategy and plans

To what extent to do companies have standard onboarding processes?

On the question of whether their companies have a process for onboarding new executives, the results unsurprisingly showed that respondents from larger firms were more likely to report that their companies had standard processes than those from mid-sized or smaller companies (48% of companies with more than 10K employees vs. 28.6% for companies with 2500-9999 employees). Participants from larger firms also reported that their companies were more likely to have some form of executive onboarding process, whether standard or custom (86% for companies with more than 10K employees vs. 76.2% for companies with 2500-9999 employees).

	Number of Employees			
	500-2499	2500-9999	10000+	All
Standard process	35.5%	28.6%	48.0%	37.4%
Custom process	41.9%	47.6%	38.0%	42.5%
No process	22.6%	23.8%	14.0%	20.1%

To what extent are companies' onboarding processes assessed as effective?

In their assessments of the effectiveness of their firms' executive onboarding systems, about a quarter of all respondents indicated that they believed their companies' onboarding processes were below or far below average. This did not vary significantly by size of company.

	Number of Employees			
	500-2499	2500-9999	10000+	All
Far above average	0.0%	0.0%	6.0%	2.0%
Above average	29.0%	14.3%	20.0%	21.1%
Average	51.6%	57.1%	48.0%	52.3%
Below average	19.4%	19.0%	20.0%	19.5%
Far below average	0.0%	9.5%	6.0%	5.2%

To what extent do companies use internal or external coaches or advisers?

Previous research [<link>](#) has shown that the use of coaches/advisers delivering a standard onboarding support process halves the time it takes newly hired executives to get up to speed. On the question of whether their companies used coaches or advisers to provide support to onboarding executives, about 20% of all respondents said no. About a third of all respondents reported that transition support was provided by HR business partners. Respondents from smaller companies were more likely to report that their companies provided support through HR business partners than those from mid-sized or larger companies (42% for firms with 500-2499 employees vs. about a third for mid-sized and larger firm respondents). Fewer respondents from large firms said their companies used external coaches/advisers as compared to mid-sized firms (7.6% for companies with more than 10K employees vs. 14.3% for companies with 2500-9999 employees).

	Number of Employees			
Use of onboarding coaches/advisers	500-2499	2500-9999	10000+	All
No coaches/advisers	22.6%	14.3%	26.0%	21.0%
Only in special circumstances	16.1%	9.5%	16.0%	13.9%
Coaching provided by				
HR business partners	41.9%	33.3%	32.0%	35.8%
Internal coaches/advisers	12.9%	28.6%	24.0%	21.8%
External coaches/advisers	6.5%	14.3%	2.0%	7.6%

What level of onboarding support do companies provide?

Analysis of the levels of onboarding support companies provided, as shown below, unsurprisingly indicated that most firms do a reasonably good job of basic orientation, with respondents reporting that their companies utilized an average of 77% of the best-practice elements. The average for active assimilation is lower, with 65% of the best-practice elements, and still lower for the accelerated integration, with a reported average of just 38% of the best practice elements. These did not vary much by size of organization.

Level of Onboarding Support (% of best-practice elements)	Number of Employees			
	500-2499	2500-9999	10000+	All
Basic Orientation	75.6%	77.1%	78.8%	77.2%
Active Assimilation	58.9%	72.9%	63.4%	65.0%
Accelerated Integration	34.4%	36.2%	43.2%	37.9%

The top quartile of respondents reported that their companies provided all five of the elements of basic onboarding, all 10 of the elements of active assimilation, seven or more of the elements of accelerated integration, and 20 to 25 of the 25 elements overall.

To what extent do companies provide support for the five core tasks?

In the five major areas of support for onboarding executives (e.g. diagnosing the situation, taking charge of the team, etc.), respondents rated their companies as strongest at supporting new leaders in aligning with stakeholders (average 69% of best-practice elements) and weakest at helping them understand the culture (average 45% of best practice elements). *Given that difficulties with adapting to new cultures is among the most common reasons external hires fail, this suggests that understanding culture is significant area for potential improvement.* These statistics did not vary much by size of organization.

Support for Key Tasks (% of best-practice elements)	Number of Employees			
	500-2499	2500-9999	10000+	All
Diagnosing the Situation	55.6%	58.1%	54.8%	56.2%
Taking Charge of Team	45.6%	52.4%	53.6%	50.5%
Aligning with Stakeholders	62.2%	72.4%	73.2%	69.3%
Understanding the Culture	38.9%	46.7%	50.0%	45.2%
Shaping Strategic Direction	60.0%	65.7%	60.4%	62.0%

The top quartile of respondents reported that their companies provided support for all five elements for each of diagnosing the situation, taking charge of the team, aligning with stakeholders, and shaping strategic direction, and four or five of the elements for understanding the culture.

Summary

While a relatively small sample of firms, the survey highlights some plausible differences in the extent and features of the onboarding systems of firms of different sizes. The relatively large number of respondents saying that their companies have no process or processes that provide only limited support or that are assessed as ineffective, highlights that substantial work remains to be done to provide newly-hired executives with needed transition support.

Appendix A. The Five Core Transition Tasks

Great onboarding systems provide newly-hired executives with the right support for the right activities at the right time. There are five major tasks that onboarding leaders must undertake in their first few critical months. These are the areas where they need the greatest support.

1. **Diagnosing the business situation.** Even with the best possible exchange of information during the recruiting process, every new hire will have an incomplete picture of the business, its strengths and weaknesses, its opportunities and threats. New leaders build credibility by learning rapidly, so they can solve urgent problems quickly and get some early wins.
2. **Taking charge of the team.** New leaders naturally focus on their direct reports early on—they know they must quickly confirm or adjust the team’s composition, roles, and goals. The window for making significant team changes does not stay open for long, so it takes focus and discipline to quickly gather the information needed to make good decisions.
3. **Aligning with stakeholders.** New leaders need to gain the support of people over whom they have no direct authority, including their bosses, peers, and other colleagues. Because they arrive with little or no relationship capital, new hires have to invest energy in building the right connections.
4. **Understanding the culture.** To have the right impact, new hires must gain insight the values, norms, and guiding assumptions that define “how to get things done” in the new organization. They also must walk the fine line between working within the existing culture and seeking to change it.
5. **Defining strategic direction.** New leaders must quickly start to shape strategy. If a new strategy is required, then corresponding elements of the organizational system—its structure and its processes for talent management and performance measurement—often must also be transformed to execute it.

Appendix B: The Levels of Onboarding Support

There is a spectrum of potential onboarding support, which is organized into four levels:

1. **Sink or swim.** Companies at this level do little more than provide the new hires with space and resources such as technology and assistants.
2. **Basic orientation.** This involves sharing information about the company, such as policies and procedures, strategy, organization structure, team member evaluations, and business results.
3. **Active assimilation.** At this level, the company proactively organizes meetings to accelerate transfer of deeper knowledge about the business, the team, the culture, and strategic priorities.
4. **Accelerated integration.** At the highest level, the company orchestrates a program of custom-designed experiences that enable new hires to integrate more fully and rapidly. These might include deep-dive discussions about the strategy and team-building workshops.