

**O'MALLEY**  
**SOROHAN**

# **ONBOARDING**

# ON-BOARDING - key principles

- **A planned, explicit on-boarding plan** is essential to ensure new hire is as effective as possible as quickly as possible.
- **On-boarding plan** should begin to take shape as soon as offer signed and should be developed collaboratively between CEO / board and new hire.
- **New hire is often bringing very different dimensions to existing team, both functionally and culturally** – with adjustment required on both sides.
- **Identify gaps/transition needs in advance** - typically in one or more of the following areas:
  - Company-specific understanding
  - Industry understanding
  - Culture transition
  - Functional skills
  - Leadership skills



# TRANSITION ASSESSMENT - requirements and support plan



COMPANY-SPECIFIC  
UNDERSTANDING

XX

XX

XX

INDUSTRY  
UNDERSTANDING

CULTURE  
TRANSITION

FUNCTIONAL  
SKILLS

LEADERSHIP  
SKILLS

# ON-BOARDING PLAN

## overview of approach

Key elements of on-boarding plan	
THE BASICS	<b>PRE-START ENGAGEMENT</b> <ul style="list-style-type: none"> <li>• Maintain positive energy and engagement</li> <li>• Involvement on decisions that impact future team</li> <li>• Announcement of appointment – messaging important</li> </ul>
	<b>GETTING UP AND RUNNING – THE BASICS</b> <ul style="list-style-type: none"> <li>• Paperwork, desk, IT access, building access., org charts</li> <li>• Introductions – message important</li> </ul>
	<b>UNDERSTANDING THE BUSINESS</b> <ul style="list-style-type: none"> <li>• Overall business objectives</li> <li>• Strategic plan</li> <li>• Recent business performance</li> <li>• Key successes / failures</li> </ul>
UNDERSTANDING	<b>UNDERSTANDING HOW THINGS GET DONE</b> <ul style="list-style-type: none"> <li>• How decisions get made, key stakeholders, motivations, sensitivities</li> <li>• Key recent business wins and change successes</li> <li>• Relevant initiatives that have failed / what gets in the way of change</li> </ul>
	<b>SENSITIVITIES SPECIFIC TO ROLE / APPOINTMENT</b> <ul style="list-style-type: none"> <li>• Key live business initiatives</li> <li>• Stakeholders directly impacted by appointment and potential sensitivities</li> <li>• Key previous initiatives in area – big wins / key challenges</li> </ul>
	<b>DELIVERABLES</b> <ul style="list-style-type: none"> <li>• Jointly agreed, clearly defined and balanced – short term credibility building / long term impact</li> <li>• How progress will be measured / reviewed, management style that</li> </ul>
IMPACT	<b>PERSONAL DEVELOPMENT REQUIRED</b> <ul style="list-style-type: none"> <li>• Skill gap / leadership development</li> <li>• Industry understanding</li> <li>• Cultural transition</li> </ul>
	<b>BUILDING CREDIBILITY</b> <ul style="list-style-type: none"> <li>• Visible support. Meeting involvement.</li> <li>• Decisions where visibly defer to new hire</li> </ul>
	<b>NOT GOING TOO NATIVE</b> <ul style="list-style-type: none"> <li>• Harnessing experience and fresh perspective to identify and deliver required changes</li> </ul>
	<b>SUPPORT AND REVIEW PLAN</b> <ul style="list-style-type: none"> <li>• Support at different levels – scheduled check-ins / reviews</li> <li>• External coach sometimes valuable</li> </ul>

## ON-BOARDING PLAN - template (1/2)

TIMING	KEY ELEMENTS	KEY ACTIONS	RESPONSIBILITY
PRE-START	PRE-START ENGAGEMENT	<ul style="list-style-type: none"> <li>• Monthly business updates</li> <li>• Meet direct reports in advance</li> <li>• Inform / involve in key decisions during interim period</li> </ul>	
PRE-START / DAY 1	GETTING UP AND RUNNING - BASICS	<ul style="list-style-type: none"> <li>• Paperwork, desk, IT access, building access., org charts</li> <li>• Introductions – message important</li> </ul>	
	TRANSITION ASSESSMENT	<ul style="list-style-type: none"> <li>• Assess gaps / transitions involved in becoming effective asap: <ul style="list-style-type: none"> <li>• Functional skills</li> <li>• Leadership skills</li> <li>• Culture transition</li> <li>• Industry understanding</li> <li>• Company specific understanding</li> </ul> </li> <li>• Determine nature of support required: <ul style="list-style-type: none"> <li>• CEO / Line Manager / Board member / Peer</li> <li>• External support – coach, networking</li> </ul> </li> </ul>	
	DELIVERABLES	<ul style="list-style-type: none"> <li>• Jointly agreed, clearly defined –with appropriate balance: <ul style="list-style-type: none"> <li>• Short-term impact on business and quick wins to gain org credibility</li> <li>• Long-term impact and strategic focus</li> </ul> </li> <li>• How progress will be measured / reviewed, management style that</li> </ul>	
WEEK 1	UNDERSTANDING BUSINESS	<ul style="list-style-type: none"> <li>• Overall business objectives</li> <li>• Strategic plan</li> <li>• Recent business performance</li> <li>• Key successes / failures</li> </ul>	
	UNDERSTANDING HOW THINGS GET DONE	<ul style="list-style-type: none"> <li>• Key stakeholders, motivations, sensitivities</li> <li>• How decisions get made</li> <li>• Key recent business wins and change successes</li> <li>• Relevant initiatives that have failed</li> <li>• What gets in the way of change</li> </ul>	

## ON-BOARDING PLAN - template (2/2)

TIMING	KEY ELEMENTS	KEY ACTIONS	RESPONSIBILITY
WEEK 1 1CONTD.	SENSITIVITIES SPECIFIC TO ROLE / APPOINTMENT	<ul style="list-style-type: none"> <li>• Key live business initiatives</li> <li>• Stakeholders directly impacted by appointment and potential sensitivities</li> <li>• Key previous initiatives in area – big wins / key challenges</li> </ul>	
WEEK 1 - ONGOING	BUILDING CREDIBILITY	<ul style="list-style-type: none"> <li>• Visible support. Meeting involvement.</li> <li>• Decisions where visibly defer to new hire</li> </ul>	
MONTH 1	OMS REVIEW	<ul style="list-style-type: none"> <li>• OMS discuss with both new executive and CEO / hiring manager to assess onboarding and identify any areas of plan that may need to be refined</li> </ul>	
MONTH 1 – ONGOING	PERSONAL DEVELOPMENT REQUIRED	<ul style="list-style-type: none"> <li>• Skill gap / leadership development</li> <li>• Industry understanding</li> <li>• Cultural transition</li> </ul>	
ON-GOING	NOT GOING TOO NATIVE /REVERSE ONBOARDING	<ul style="list-style-type: none"> <li>• Harnessing experience and fresh perspective to identify and deliver required changes</li> </ul>	
ONGOING (MONTH 1 - WEEKLY – MONTH 2+ MONTHLY)	PERIODIC REVIEWS	<ul style="list-style-type: none"> <li>• Business understanding</li> <li>• Culture transition / reverse onboarding                             <ul style="list-style-type: none"> <li>• What learning about culture</li> <li>• Where transition working well / where challenging</li> <li>• Emerging thoughts on areas where change could be beneficial to business</li> </ul> </li> <li>• Stakeholders understanding / sensitivities / resistance</li> <li>• Personal - Transition impact on personal / family situation</li> <li>• Deliverables</li> <li>• Any change in nature of support required</li> </ul>	