

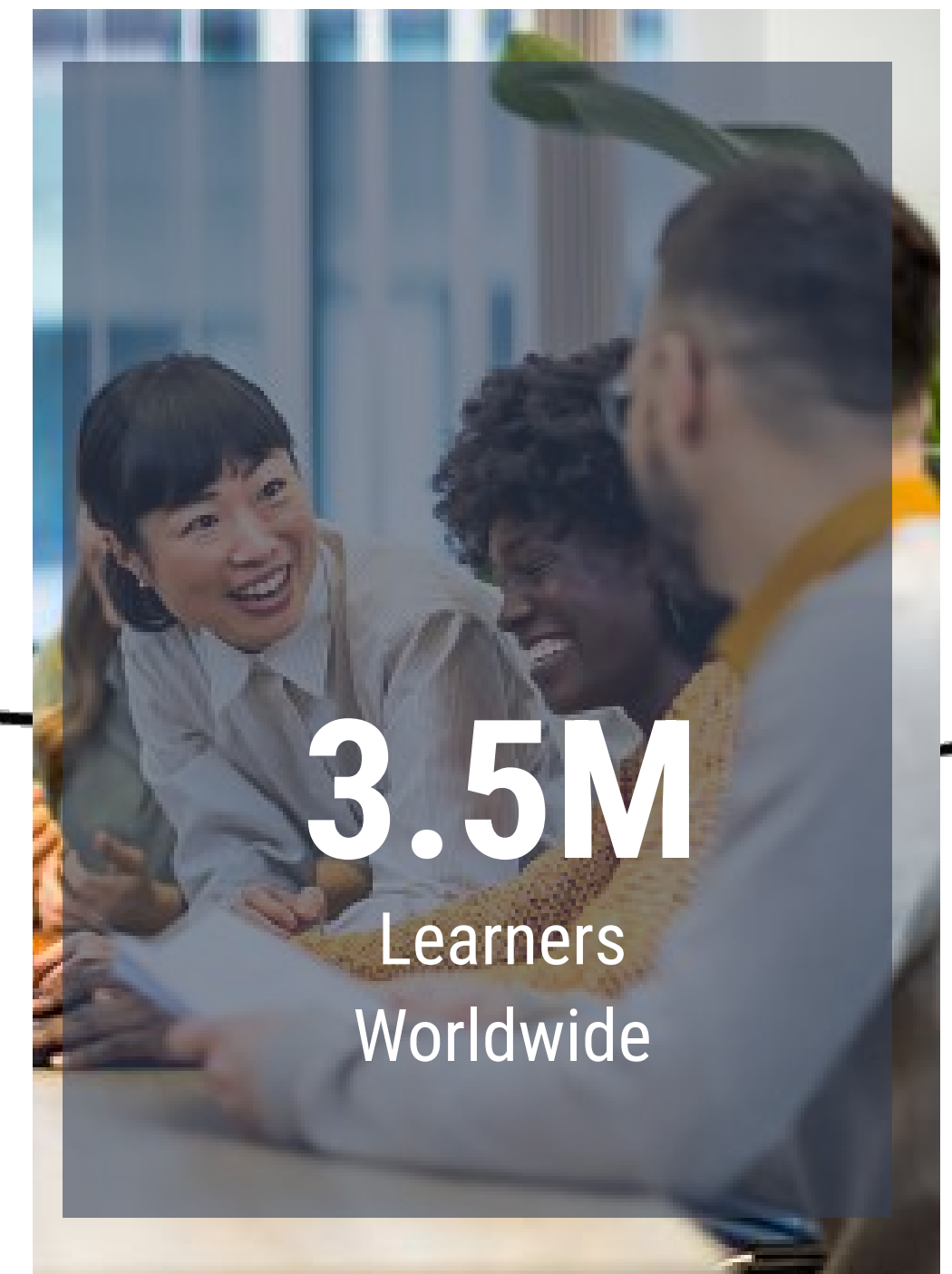
LX PRACTICE ESSENTIALS

# ONBOARDING





# 40+ YEARS SUPPORTING ONBOARDING



*All totals from only the past 10 years*

# FRESH INSIGHTS IN ONBOARDING TRAINING

*Strengthen the Employee Experience, Support Remote and Hybrid Delivery, Increase Readiness*

|                                                                                                | Conventional Approach                                                                               |  ALLENCOMM                               |
|------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
|  SCOPE        | Limited to the <b>first few days or weeks</b> and focused on <b>HR content</b>                      | Spans <b>several months</b> and focuses on experiences vital to long-term success                                           |
|  PURPOSE    | Covers essential <b>logistics</b> and <b>resources</b> foundational to employment                   | Scaffolds the <b>overall employee experience</b> , builds <b>readiness</b> for the new role, and fosters <b>affiliation</b> |
|  APPROACH   | Uses <b>checklists</b> , <b>canned presentations</b> , and introductory meetings to orient learners | Provides a <b>personalized learning path</b> that combines formal, social, and experiential learning                        |
|  EXPERIENCE | Perceived as <b>dull</b> and <b>transactional</b>                                                   | <b>Engages</b> learners through <b>connection</b> , <b>narrative</b> , and <b>culture</b>                                   |





# MORE ENGAGEMENT, LESS TRAINING

*Our onboarding LX framework helps clients align their program to meet needs for both learning and experience.*

## ANALYZE EXPERIENCE

Understand the **employee experience** and readiness for on-the-job **performance**.

## PRIORITIZE EXPERIENCE

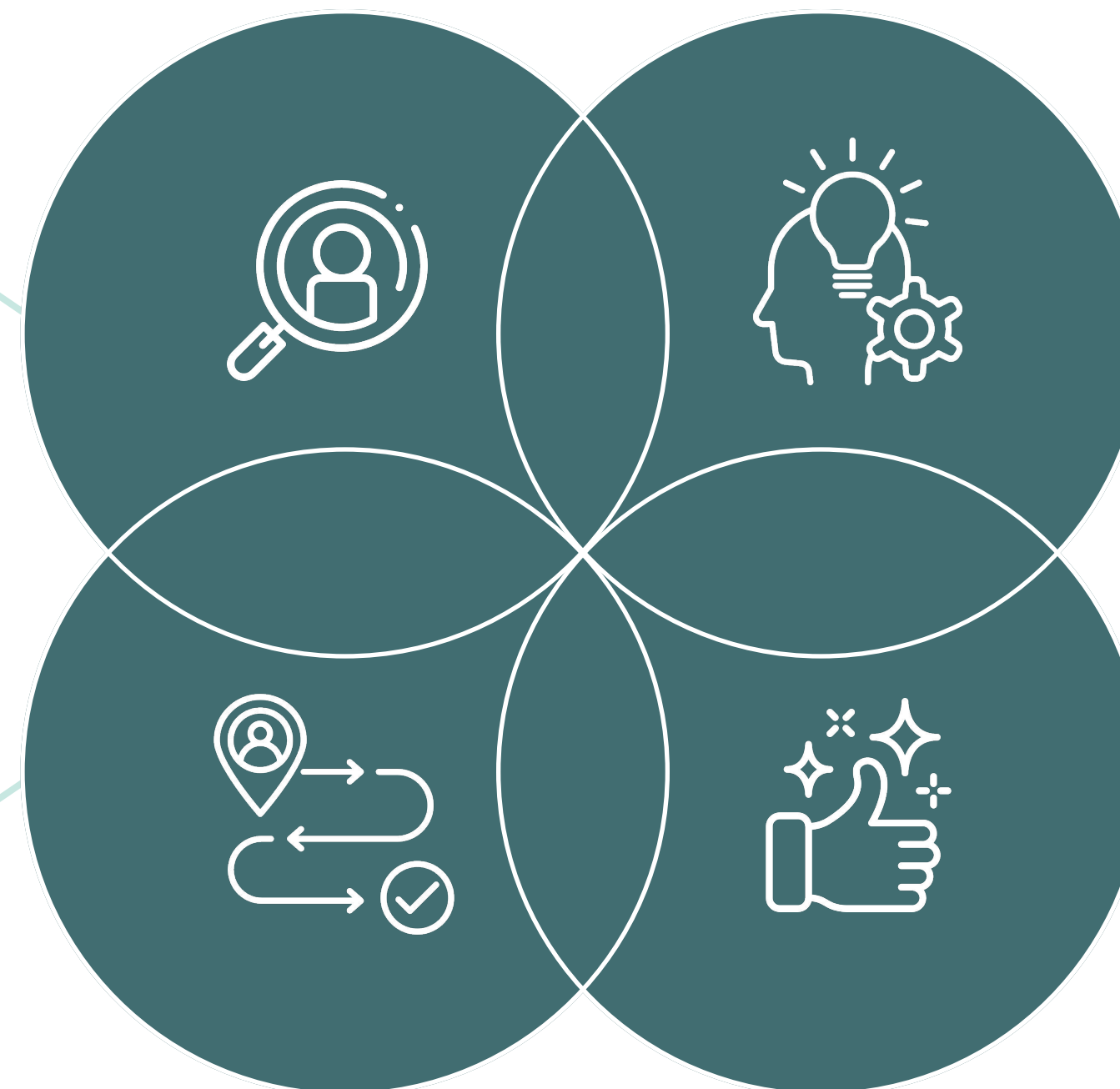
Create context, not content, with a design that optimizes **engagement**.

## ALIGN WITH EMPLOYEE JOURNEY

Integrate **employee and learner journeys** with flexible, personalized paths.

## MEASURE READINESS

Go beyond checklists with learner dashboards to provide **clarity** and **confidence**.





# EMPLOYEE EXPERIENCE & PERFORMANCE READINESS



## Why is it critical?

More insightful up-front research to focus the analysis on the **outcomes**



## What will it achieve?

Increased **retention**, stronger org **affiliation**, and **success** in the new role



## What does it look like?

A **matrix of learner and organizational needs** for employee experience (EX) and performance outcomes

| READINESS NEEDS ANALYSIS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| EXPERIENCE WITH THE ORGANIZATION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | EXPERIENCE WITH THE WORK                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | EXPERIENCE WITH OTHER PEOPLE                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | EXPERIENCE AS AN INDIVIDUAL                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <div>1. What was your pre-hire perspective on the organization? How did that change during the first week, month, and quarter on the job?</div> <div>2. What is your understanding of the products and services the organization provides?</div> <div>3. What you do you believe to be the organization's value to customers or to the market, field, or industry?</div> <div>4. What specific experiences have shaped your current perspective on the organization? During your first days, weeks, or months?</div> <div>5. In hindsight, what experiences would have provided you with better context on the organization?</div> | <div>1. What was your pre-hire perspective on your role and the work to be done? How has that changed during the first week, month, and quarter on the job?</div> <div>2. What pre-hire experiences have best prepared you for the actual work and priorities of your role?</div> <div>3. What post-hire experiences have best prepared you for the actual work and priorities of your role?</div> <div>4. How confident did you feel about succeeding in the role initially? After a week, month, and quarter?</div> <div>5. In hindsight, what additional context would have accelerated your performance or boosted your confidence?</div> | <div>1. What were the most impactful connections that you made with other people at the organization? During the first week, month, and quarter?</div> <div>2. What connections do you wish you had been able to make or been able to make sooner?</div> <div>3. How long did it take for you to feel comfortable working with your team? What experiences were most critical?</div> <div>4. How long did it take for you to feel comfortable working with your manager? What experiences were most critical?</div> <div>5. What opportunities did you or do you have to extend your internal professional network at the organization?</div> | <div>1. What experiences during your first week, month, and quarter have made you feel most excited and engaged about your new role?</div> <div>2. Do you feel that this role will be a good fit for you personally? What experiences shaped this perspective?</div> <div>3. Will you be about to use your individual strengths and talents in the role? What experiences shaped this perspective?</div> <div>4. Do you believe that this role will meet your individual needs as a professional? What experiences have most influenced you?</div> <div>5. Can you envision a long-term future for yourself with the organization? What has shaped that vision or plan?</div> |



# READINESS NEEDS ANALYSIS

## EXPERIENCE WITH THE ORGANIZATION

1. What was your pre-hire perspective on the organization? How did that change during the first week, month, and quarter on the job?
2. What is your understanding of the products and services the organization provides?
3. What do you believe to be the organization's value to customers or to the market, field, or industry?
4. What specific experiences have shaped your current perspective on the organization? During your first days, weeks, or months?
5. In hindsight, what experiences would have provided you with better context on the organization?

## EXPERIENCE WITH THE WORK

1. What was your pre-hire perspective on your role and the work to be done? How has that changed during the first week, month, and quarter on the job?
2. What pre-hire experiences have best prepared you for the actual work and priorities of your role?
3. What post-hire experiences have best prepared you for the actual work and priorities of your role?
4. How confident did you feel about succeeding in the role initially? After a week, month, and quarter?
5. In hindsight, what additional context would have accelerated your performance or boosted your confidence?

## EXPERIENCE WITH OTHER PEOPLE

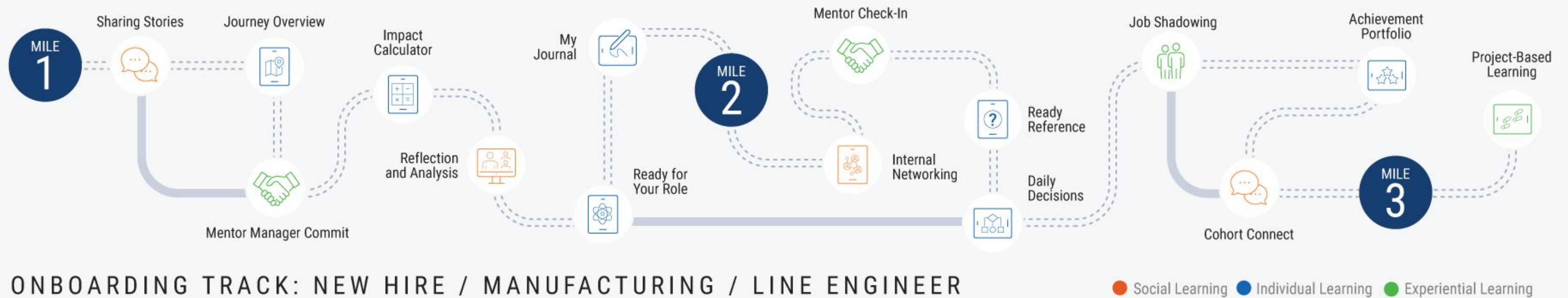
1. What were the most impactful connections that you made with other people at the organization? During the first week, month, and quarter?
2. What connections do you wish you had been able to make or been able to make sooner?
3. How long did it take for you to feel comfortable working with your team? What experiences were most critical?
4. How long did it take for you to feel comfortable working with your manager? What experiences were most critical?
5. What opportunities did you or do you have to extend your internal professional network at the organization?

## EXPERIENCE AS AN INDIVIDUAL

1. What experiences during your first week, month, and quarter have made you feel most excited and engaged about your new role?
2. Do you feel that this role will be a good fit for you personally? What experiences shaped this perspective?
3. Will you be about to use your individual strengths and talents in the role? What experiences shaped this perspective?
4. Do you believe that this role will meet your individual needs as a professional? What experiences have most influenced you?
5. Can you envision a long-term future for yourself with the organization? What has shaped that vision or plan?



# A JOURNEY TO EMPLOYEE SUCCESS



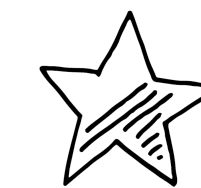
## Why is it critical?

Sequences the **right experiences**, at the right time, with the **right context**



## What will it achieve?

Overall structure with the flexibility to **meet the needs** of individuals



## What does it look like?

A **progressive series** of multimodal experiences that bridge the transition to success

# DESIGN FOR THE EMPLOYEE EXPERIENCE



## Why is it critical?

Employee experience (EX) is paramount in onboarding and learning is an **enabler**



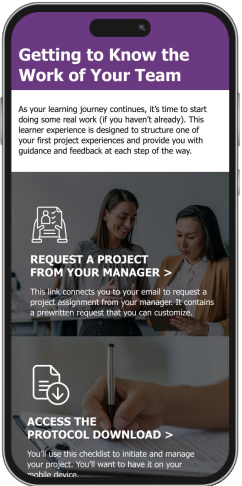
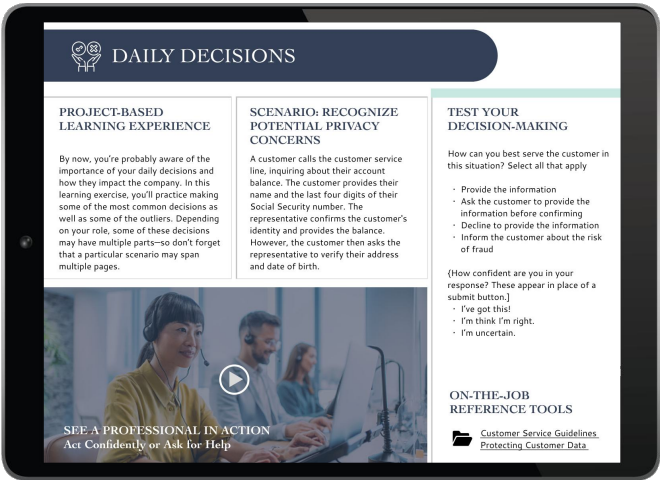
## What will it achieve?

Make **connections**, build **confidence**, shape **perception** of the new org or role



## What does it look like?

Like your **org on its best day** in terms of branding, collaboration, and inspiration





YOUR POTENTIAL IMPACT



### Personal & Professional Impact Calculator

You, your work, and your relationships with your team members and/or customers will have a big impact on our organization. We want to help you see the potential impact of your role and your importance to our organization. Here are a series of 6 questions to that will help to illustrate the potential impact. Please keep in mind that your actual impact may be much greater. We're only looking at a few variables in this calculator.

QUESTION 3

Who are the people within your sphere of influence—both personally and professionally? How many people do you interact with in each of these contexts?

Please select all that apply. Any data that you provide during this exercise is saved anonymously and will not be reported using personal identifiers.

FAMILY

12

RELIGION

25

SCHOOL

15

GROUPS / CLUBS

18

THE GYM

14

SOCIAL MEDIA

20

MY TEAM

10

MY DEPT

22

PARTNERS

16

PROSPECTS

11

CLIENTS

13

SUBMIT

DAILY DECISIONS

PROJECT-BASED LEARNING EXPERIENCE

By now, you're probably aware of the importance of your daily decisions and how they impact the company. In this learning exercise, you'll practice making some of the most common decisions as well as some of the outliers. Depending on your role, some of these decisions may have multiple parts—so don't forget that a particular scenario may span multiple pages.

SCENARIO: RECOGNIZE POTENTIAL PRIVACY CONCERNS

A customer calls the customer service line, inquiring about their account balance. The customer provides their name and the last four digits of their Social Security number. The representative confirms the customer's identity and provides the balance. However, the customer then asks the representative to verify their address and date of birth.

TEST YOUR DECISION-MAKING

How can you best serve the customer in this situation? Select all that apply.

- Provide the information
- Ask the customer to provide the information before confirming
- Decline to provide the information
- Inform the customer about the risk of fraud

{How confident are you in your response? These appear in place of a submit button.}

- I've got this!
- I'm think I'm right.
- I'm uncertain.

ON-THE-JOB REFERENCE TOOLS

Customer Service Guidelines  
Protecting Customer Data

SEE A PROFESSIONAL IN ACTION

Act Confidently or Ask for Help



Getting to Know the Work of Your Team

As your learning journey continues, it's time to start doing some real work (if you haven't already). This learner experience is designed to structure one of your first project experiences and provide you with guidance and feedback at each step of the way.

REQUEST A PROJECT FROM YOUR MANAGER >

This link connects you to your email to request a project assignment from your manager. It contains a prewritten request that you can customize.

ACCESS THE PROTOCOL DOWNLOAD >

You'll use this checklist to initiate and manage your project. You'll want to have it on your mobile device.

22:05

Mj\* COHORT CONNECTIONS

Collaborate for Troubleshooting and Innovation

It's great to know who your coworkers and collaborators will be. It's even better to be able to practice that collaboration in a low-stakes practice environment where everyone feels free to make mistakes and try something new. The following cards each contain a collaboration question that will prompt different contributions from each member of your practice team.

How to Play

1. Each person takes turns selecting a card and turning it over (you can switch who is sharing the video call to allow for this). You can go in order of hire date or tenure (from earliest hire to most recent).
2. The team member who selected the card reads the front and back of the card, which will present the challenges and discussion points for each.
3. Each team member shares their initial response to the high-level challenge before the team engages in dialogue.
4. The team member who selected the card rereads the discussion points.
5. The group determines how best to respond and arrive at a conclusion.
6. Once a conclusion is reached, the team moves on to the debrief on the exercise.
7. Each individual logs their learnings in the corresponding worksheet on their onboarding dashboard.

Unexpected Project Pivot

Mj\*

Unexpected Project Pivot

Your team is midway through a project when a major client requests a significant change in direction. How do you effectively communicate this change to the team and ensure everyone is aligned on the new goals?

DISCUSSION POINTS

- How do you effectively communicate the change to the team without causing unnecessary stress or anxiety?
- What strategies can you use to ensure that everyone understands the reasons for the change and is committed to the new direction?
- How can you address potential concerns or resistance from team members who may be resistant to change?
- What steps can you take to maintain team morale and motivation during this transition period?

Interdepartmental Conflict

Mj\*

Limited Resources

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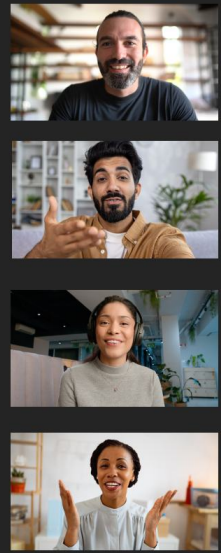
Remote Team Collaboration

Mj\*

Interpersonal Conflict

Mj\*

Leave



Job Shadowing & Analysis

Getting to Know the Work of Your Team

To better understand the context in which you will be working in your new role, we want to give you the opportunity for first-hand observation and analysis of the work that we do. Depending on the number of unique or relevant roles in your department, you'll complete this exercise once for each of those roles (or as determined by your manager).

NEXT STEPS

 Request a job shadowing assignment: [This link](#) connects you to your email to send an email request to your manager. It contains a prewritten request that you can customize.

 Schedule the exercise: [This link](#) connects you to the calendaring system for your organization. It includes the information needed by whoever is assigned to work with you.

 Access or download the protocol [here](#): You'll use this checklist before and during your job-shadowing experience. You'll want to have it on your mobile device.

Submit your analysis worksheet: This is a 2-page analysis of your experience where you record and process what you've learned. It's due within 1 day of completing your job shadow.



<< BACK | NEXT >>



# CLARITY BRINGS CONFIDENCE



## Why is it critical?

Help learners to know **where they are**, what's **expected**, and what's **ahead**



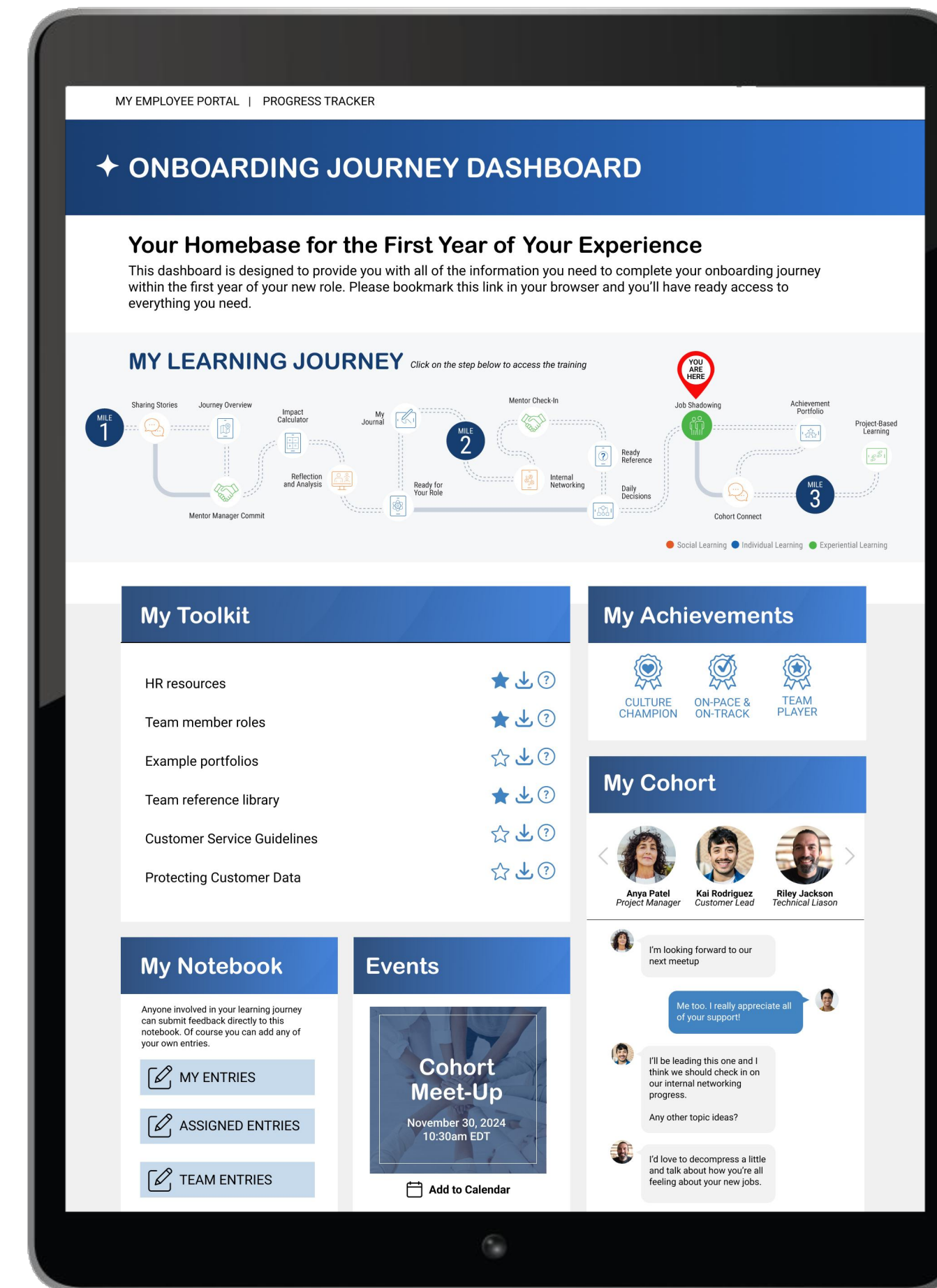
## What will it achieve?

Build **confidence** by showing **progress** on the journey to **readiness**



## What does it look like?

A **planner** and **organizer** more than a scorecard—the focus is on **achievement** and **progress**





# THANK YOU



## Key Points

- Onboarding needs to be focused on building the **employee experience**.
- **Remote and hybrid workplaces** make onboarding even more critical.
- Start with an analysis of the experience learners need as well as their **readiness** for the new role.
- Focusing on experience will build learner **confidence** and provide valuable **context** to accelerate readiness.

## Learn More

[Rethinking the Onboarding Learner Experience Journey](#)

[An Onboarding Learner Experience to Support the Employee Experience](#)

[Creating an Effective Onboarding Learning Experience for the Evolving Workplace](#)

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