



A Manager's Guide to Onboarding

How to design an onboarding program so
every new hire gets a holistic introduction
to their new team and company.



Onboarding is a crucial moment in the employee experience.

It's the first opportunity for the organization to live up to — or fall short of — the promises it made during the recruitment and hiring process.

It's a time to welcome the new hire onto the team and help them understand the team and organizational identity, values, and ways of working. It's also a time to focus on the individual and help them understand their role, their partnerships, and the unique ways you expect them to contribute.

That's a lot to ask of a program that ranges from a few days to a few weeks in length, and which is often limited to trips to the IT helpdesk and sifting through paperwork about policies and benefits.

But the onboarding period has real stakes. [Research by CareerBuilder](#) shows that:



of employers agree that a **successful onboarding** experience **will influence a new hire's decision to stay at the company.**



of employees think their companies **did a good job with onboarding.**

There needs to be an organization-wide recognition of the value of onboarding, so the new hire doesn't get the message that you want them to speed through the online security training as a check-the-box activity.



The goal of this guide is to show you that onboarding is so much more than teaching a new hire how to spot attempts at phishing. Your efforts as a manager can create a great onboarding experience that connects you with the new hire, and connects them to the team and the organization in a meaningful way.

Cover the four Cs of effective onboarding

Onboarding is one of the earliest stages in the employee life cycle, and managers should already be thinking holistically about the employee's entire experience with the company. That includes what could go wrong during onboarding that might lead to turnover down the road.

For example, if the new hire doesn't get absolute role clarification, they could conclude that the company, or their boss, is disorganized. If they don't get a sense that they belong within the culture, they could start off their tenure with you feeling bothered.

Dr. Talya Bauer's framework, [“The Four Cs,”](#) is often used to design onboarding programs. It ensures that onboarding covers the most important things the new hire needs to know about the organization and their role.

The Four Cs stand for:

- **Compliance:** Legal and policy-related rules and regulations
- **Clarification:** Understanding of job and performance expectations
- **Culture:** Formal and informal organizational norms
- **Connection:** Interpersonal relationships and information networks



A well-thought-out onboarding process will cover the four Cs because it not only accounts for personality differences of new hires, but also for the potential preferences and blind spots of the people designing the program, and the organization they operate within. To that point, make sure there are multiple people with different perspectives involved in the design and management of the onboarding process itself, so it doesn't end up reflecting one person's priorities.

The four Cs will mean something different to each organization, so no two onboarding programs will look alike even when they follow the same framework.

Largely, though, companies tend to cover compliance and clarification effectively, but the last two get short shrift. However, culture and connection are vitally important elements of onboarding. If the first impression of your company is all about compliance and clarification, a new hire who's a total 'people person' is likely to feel like a misfit and become disengaged from the start.

The purpose of sharing company culture during onboarding is not for the new hire to adopt all the same values as the organization, but for them to integrate the company's values with what has been important to them for their entire life. Spending time helping the new hire discover the culture will help them develop a sense of belonging and a desire to contribute excellent performance.



Top 3 Strengths
Quick-to-Act, Fair, Forceful

COMPARE



The purpose of fostering connection is because good work is built on [good relationships](#). Most onboarding programs focus on gimmicky teambuilding tricks rather than helping team members know each other genuinely and appreciate each other's differences. The connection portion of the program should answer the questions:

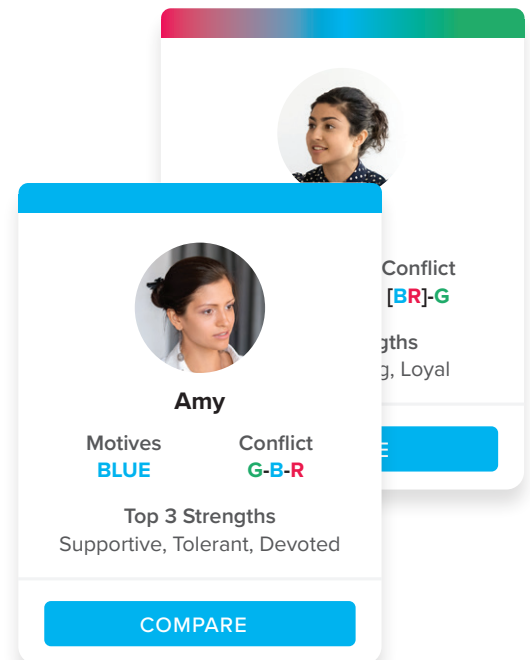
- Who do you need to meet?
- How will we work together?
- Who will we be together?
- How will we help each other's best selves show up when it matters most?

A good onboarding manager is aware that understanding all four areas — not just compliance and clarification — is crucial to success at the organization.

Know what motivates the new hire

The [SDI 2.0 assessment](#) from Core Strengths helps us understand why we behave how we do, and how we relate to each other. It provides a common language for new hires and existing team members alike to talk about what matters to them.

While the SDI 2.0 has infinite use cases beyond onboarding, you can create a much more effective and personally meaningful onboarding experience when you make the SDI 2.0 assessment available to new hires.





Here's the gist of the SDI. According to [Core Strengths](#) research, people find a sense of purpose within three primary motivations:



When you take the [SDI 2.0 assessment](#), you'll get a full portrait of how all three blend in your personality. But even if you haven't taken the assessment, or haven't heard of the SDI before, keep reading.

There are four main personality types that people fall into. Knowing the new hire's personality type will help you connect with them and give you insight into their values and motivations.





The manager's onboarding pre-work should involve reviewing the new hire's [SDI assessment](#) results and thinking critically through the lens of the four C's — compliance, clarification, culture, and connection — about the parts of onboarding that each person is more or less likely to pay attention to.

That's because, depending on the new hire's priorities and values, they may breeze past certain areas of onboarding while they go deep in others. As the manager, it's your job to make sure they get a thorough onboarding experience that covers all four Cs.

Each personality type will be drawn to different elements of the four Cs:

When something matters to us deeply, we look at everything in life through that filter. When managers know the new hire's primary motivations, you get insight into where in all the onboarding material their attention will go naturally.

Something not many managers will do, but will help the new hire feel understood, is to have an honest discussion with the new hire about the things they're likely to be most and least interested in. Don't judge them if they say one element is boring, or another is a waste of time. All of this is insight that allows you to design an onboarding process that's more likely to be effective for that person.



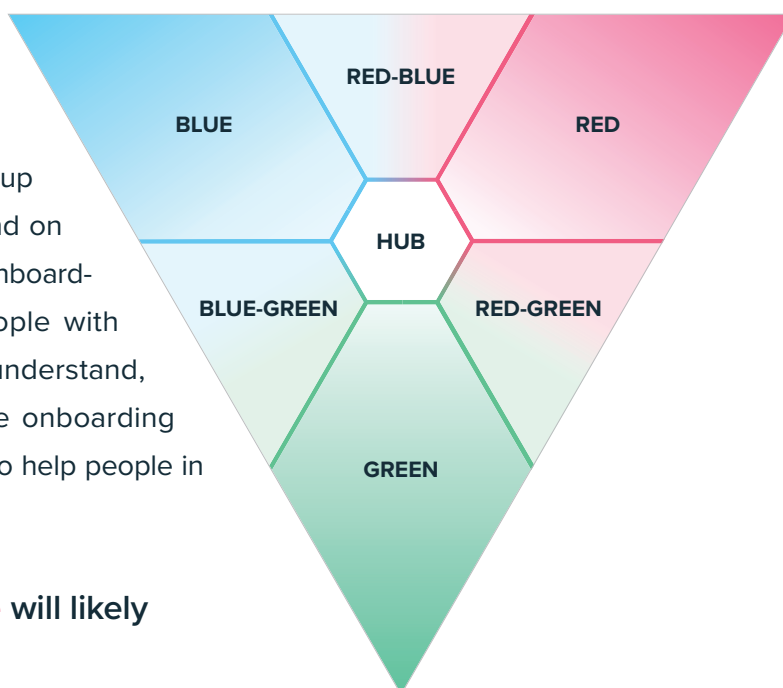


Below are some tips for how to thoroughly cover the areas they care about, and how to motivate them to complete the areas they may be less attentive to.

People with a Blue motive will likely prioritize connection.

This person is the most likely to embrace the onboarding process, unless it's structured as just an operational checklist. Individuals with a people-focused personality will feel that they need to spend time meeting all the people they're likely to work with in their role and building their networks.

These people may get caught up in conversations and fall behind on the more task-centric parts of onboarding. Managers should let people with blue motivations know they understand, but that completing the entire onboarding process will better allow them to help people in their role going forward.



People with a Red motive will likely prioritize clarification.

This person has to know they're winning every day. Individuals with a performance-focused personality feel that they must achieve every objective and are likely to treat onboarding as a challenge to be met.

However, performance-focused people will also be anxious to start contributing to the team and doing the job they were hired for and may feel that onboarding is a waste of their time. To motivate this person, managers should treat onboarding as the first project they need to succeed at, and give them feedback about their performance.

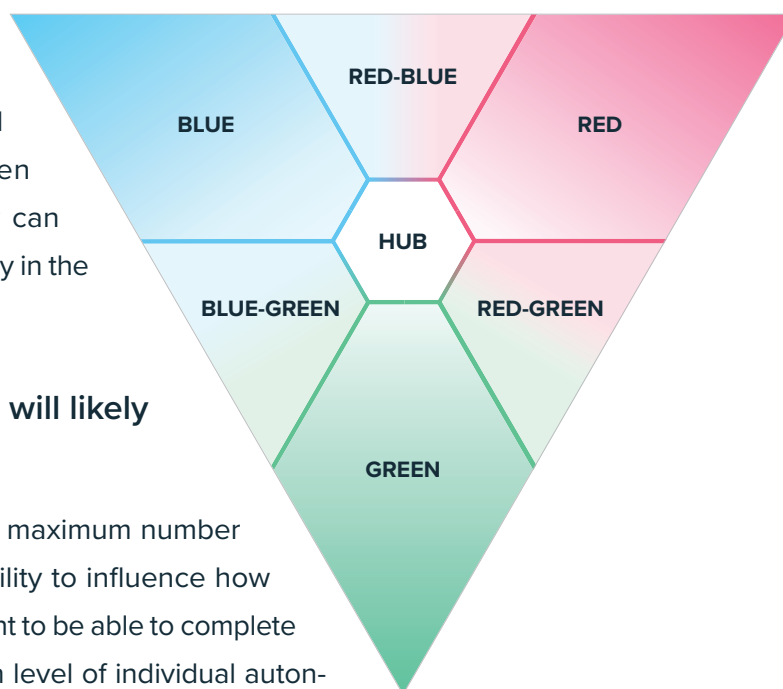


People with a Green motive will likely prioritize compliance.

This person wants to complete every task thoroughly, onboarding included. They're likely to look for areas that haven't been covered — and then cover them.

Conversely to performance-oriented people, this process-oriented person may strike their manager as being slow to engage with their job once the onboarding period is over, because they care so deeply about understanding the rules of the game and setting up effective processes.

To motivate them, make sure they know that their opportunity to optimize and understand processes doesn't end when onboarding ends — that they can continue to contribute in that way in the role they were hired for.



People with a Hub motive will likely prioritize culture.

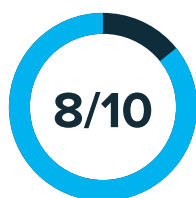
This person wants to have the maximum number of options. They desire the ability to influence how they're onboarded, and they want to be able to complete onboarding tasks with a certain level of individual autonomy. But compliance, clarification, and connection are also important to them, since they lie at the middle of the triangle of motivations.

This option-oriented person may push back about any parts of onboarding that are set in stone or have to be completed in a certain order or within a certain timeline. To motivate them, give them as much autonomy as possible and ask for their input about how to make the onboarding process more flexible.



Minimize imposter syndrome with a well-designed onboarding plan

Impostor syndrome is a feeling of self-doubt about your abilities, and it's common among new hires—Asana found that nearly eight out of every ten new hires experienced impostor syndrome in 2020.



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When you, as the manager, adequately prepare to onboard a new hire and design a plan following the four Cs and using the SDI 2.0 assessment, you can minimize imposter syndrome and help every new hire feel confident, valued and empowered right from the start. A good onboarding process accepts the fact that 8 out of every 10 new hires experiences imposter syndrome, and builds in a conversation about it.

The SDI 2.0 is a common language that helps accelerate understanding about people's core values — but also their strengths. The results of the assessment give you a thorough portrait of your strengths, including the ones you tend to use more and less.

At Core Strengths, we believe that everyone has access to all strengths, and can develop any of them, but that we naturally favor some over others.

When we take a new job, we may have to use some of the strengths that we've rarely accessed in the past, and that could inspire imposter syndrome. For example, someone who's never led a team of people could feel that they're ill-equipped to do so based on their natural talent for independent work.



Managers can reframe this concern as an opportunity for them to use other strengths more. Underline the areas where you know they have expertise and why you hired them, then help them see their abilities in a new light: no one expects that a new hire will come into a new job as the expert already. A new job should be an exciting opportunity for growth and development, and as the manager, you're there to help them stretch their wings.

Core Strengths tools can help you design a successful onboarding program

This guide only scratched the surface of the power of the [SDI 2.0 assessment](#).

The assessment shows you who you are and how you work, in the context of your motives, conflict triggers and behavior, strengths, and overdone strengths. It helps people feel more included and engaged at their organizations, and helps teams work better together.

Make the [SDI 2.0 assessment](#) part of your onboarding program.

[Learn More](#)

