

# Strategic OnBoarding<sup>®</sup>

A PROCESS FOR CONNECTING CRITICAL HIRES TO YOUR BUSINESS STRATEGY

BY RON COX AND CHRIS COX

The logo for 'tailwind' features the word 'tailwind' in a blue, lowercase sans-serif font. A blue curved line above the 'i' and 'n' suggests a wind or tailwind.

**A**ll new hires are not created equally. Dr. Joseph Juran taught us that a key to success lies in being able to *separate the vital few from the trivial many*. He gave us the Pareto Principle or 80/20 Rule. Not to disparage anyone by saying they're less important, but as organizations go, some hires are more critical than others. If you don't buy into that, talk to a board member about the search for the next CEO and compare that to what a recruiter is doing to fill other positions in the same company. The reality is that, whether you know it or not, you separate the vital few hires and handle them *very* differently. It just makes sense. When you're hiring an upper level player or key contributor, the stakes are much higher, as are the expectations of everyone involved.

The question then becomes, "So what do you do differently in your on-boarding process for those vital few key hires?" They are being brought in to fill a key

*"Many companies leave executive on-boarding to chance and, as a result, experience failure rates in excess of 50% when it comes to retaining new executive talent."*

—EGON ZENDER INTERNATIONAL

position and help the organization realize its strategic intent. They need to be strategically connected to the company as quickly as possible so that they can leverage their experience and contribute at a high level. These most critical hires play key roles that are strategic in nature. As such, their assimilation can be greatly enhanced by something we call Strategic OnBoarding<sup>®</sup>.

## WHAT IS STRATEGIC ONBOARDING?

Strategic OnBoarding can be defined as purposefully connecting the newly hired executive to the company's strategy from the onset. It aligns their thinking and planning with the company's overall strategic intent within their first few months in their new position. It accelerates their performance and contribution to overall results and makes them strategically relevant to their new organization from the beginning.

No matter how talented they are, newly hired executives cannot immediately leverage their abilities in a new position without first understanding the

overall strategy. They lack a big picture context for their decisions and a complete understanding of their situation. While they have a good idea of

“what” to do, they need to assimilate the new situation in order to figure out “how” to go about it.

*40% of newly appointed leaders & executives are out of their jobs within 18 months.*

—MANCHESTER ASSOCIATES & CENTRE FOR CREATIVE LEADERSHIP

*What’s the overall strategy? How do I fit into the big picture? What’s the situation that I’m entering into? What don’t I know? Where can I get the information I need? What comes first strategically? Why? What do I have to work with? How do I go about leveraging internal resources? How do I make sure that what I want to do synchs up with the overall gameplan?*

A new hire or transitioning executive has a huge blind spot about the new organization that hampers their ability to develop and drive the right strategy from the beginning. Accelerating how they assimilate information and develop the right thought process can radically change their ability to swim at the deep end of the pool.

#### **WHAT DOES STRATEGIC ONBOARDING DO FOR MY ORGANIZATION?**

Strategic hires represent both a significant investment and a significant risk. The hard costs and soft costs of the search, selection, relocation and transitioning processes are usually significant. The salary costs are high, and upper level positions sometimes come with employment contracts that guarantee severance if things don’t work out. And data suggests that mid-career transitions don’t always work out the way we intend. In fact, there’s a higher than expected failure rate among transitioning mid-career executives.

In a way, hiring a mid-career executive from another organization is a strategic bet. You are betting that what they can do for your company, in both the short term and the long term, outweighs the potential risks of them not performing as you’d expect or not being retained by the organization. Obviously, you want to do everything that you can to mitigate the risks associated with your strategic bet.

Strategic OnBoarding should be part of your risk mitigation strategy. By connecting the new executive to your company’s strategy early on and in a meaningful way, they are able to leverage their talent and experience toward accomplishing what you brought them in to do. They come up to speed much faster and are more strategically relevant. And, when they are on top of the strategy and what needs to be done, they are more fully assimilated. They become mentally engaged and know that they are making a difference as part of the team. Plugging into the overall strategy and making a difference right away are critical variables that enhance retention. Speed to contribution and enhanced retention not only help solidify your strategic bet, they provide a serious return on your hiring investment.

#### **WHAT ARE SOME OF THE KEYS TO STRATEGIC ONBOARDING?**

By definition, Strategic OnBoarding involves being able to connect the new executive to your strategy. That requires several key elements, beginning with the strategy itself. Your strategy needs to be clear, focused and “connectable.” That is, it needs to clearly articulate your company’s vital few priorities in a structured way so that they can be easily understood.

In addition, the OnBoarder needs access to strategic materials and expertise during their transition.

This enables them to ask questions, gain insights, and confirm conclusions as they think their way through the strategic direction. Communicating the strategy is not the same thing as having an executive understand it, or know how they fit into it. Strategic OnBoarding, where the executive becomes fully connected to the strategy, requires a learning curve and takes a little time.

When you think about it, Strategic OnBoarding is more like a complex problem-solving exercise than a strategic planning exercise. In most cases, the strategic direction of the company is already in place; the OnBoardee needs to understand that direction and translate what it means for them. In the same way that business leaders use structured problem-solving processes, executives need to gather data, sort out cause and effect relationships, prioritize what needs to happen, then develop and implement potential solutions. All of this needs to synch up with the overall strategy. Using a structured approach with analytical thinking frameworks, (like problem-solving), enhances your ability to quickly connect the OnBoardee to the overall strategy.

### HOW DOES STRATEGIC ONBOARDING FIT IN WITH WHAT OUR EXISTING ON-BOARDING PROCESS?

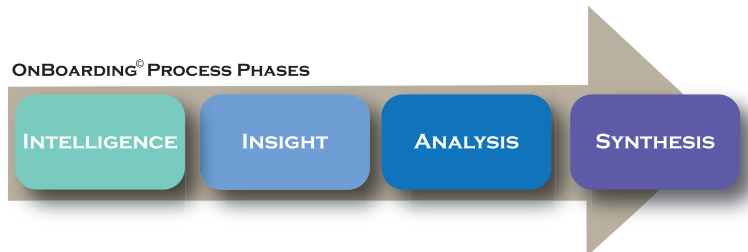
If you already have an OnBoarding process, chances are you've focused on speeding up the assimilation process and made some inroads into Strategic OnBoarding for everyone you hire. Remember, all new hires are not created equally, so the question becomes, *"What else could we be doing for our critical, strategic hires?"* For the more critical strategic hires, the progression we recommend will complement what you're already doing and help you deliver a better outcome. This approach provides you with a new lens to determine what could be added

to help accelerate the process of connecting new executives to your strategy.

If you don't already have a structured OnBoarding process, think of Strategic OnBoarding as a viable solution for those key hires that need to be quickly connected to the overall strategy.

### MATCHING THE NATURAL RHYTHM OF STRATEGIC ONBOARDING

The Strategic OnBoarding process unfolds in parallel with the natural learning rhythm of the OnBoardee. Tailwind recommends a structured approach that utilizes four sequential phases.



These progressive phases are consistent with Bloom's Taxonomy of Learning and become more involved as they unfold. Here's a quick summary of each phase:

**INTELLIGENCE**—the broad gathering of information that commences with the OnBoarding process. This phase is most intense during the first month or two in the new situation.

**INSIGHT**—the conversion of raw intelligence to critical insights that might affect the OnBoardee's strategy. This distillation process begins right away, but continues into the middle phase of the OnBoarding experience.

**ANALYSIS**—the breaking down of the situation into key components to understand causal relationships and prioritize key drivers. Gaps are identified and initiatives required to close them become apparent.

**SYNTHESIS**—the bringing together of disparate

complex ideas to form new thoughts and direction. A well informed gameplan is put together by the individual to close the gaps that have been identified and drive results. This gameplan represents the translation of the company's strategy at the OnBoardee's level. It is perfectly aligned with the strategic intent and becomes a clear, strategic roadmap for the OnBoardee to follow for the next year.

OnBoardees naturally flow through these four phases, usually in a compressed time frame. Unfortunately, they often have to create their own structure for pulling it all together. While they receive a lot of help and support from their new organization, it generally falls short of providing a structured experience that enables them to solidify their connection to the overall strategy.

Like complex problem-solving, the Strategic OnBoarding process is teachable, learnable and replicable. With that in mind, the operative question becomes, *"Do you really want the process of connecting a strategic hire to your strategy left up to a random approach, where they have to take the lead in creating it for themselves?"*



**RON COX** is Founder and CEO of Tailwind Consulting. Prior to forming Tailwind, Ron was CEO of four international training and consulting companies. Chris Cox is a Principal with Tailwind who focuses on creating new approaches and developing new intellectual property.

Tailwind helps organizations connect their people to their strategy and has pioneered new methodologies in translating strategy at the individual level. Tailwind designed and developed Strategic OnBoarding<sup>®</sup>, an innovative process for connecting critical new hires to their company's strategy.

**Contact Tailwind at [www.tailwindconsulting.com](http://www.tailwindconsulting.com), 813.903.9509, [info@tailwindconsulting.com](mailto:info@tailwindconsulting.com)**

*Strategic OnBoarding<sup>®</sup> is copyrighted by Tailwind Consulting; All Rights Reserved.*