Onboarding & Knowledge Transfer Challenges and Best Practices

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April 10, 2013
Tips for the Webinar

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- Raytheon
  - Over 90 years of innovation
  - 70,000 employees worldwide
  - Defense, Homeland Security, Aerospace

- Raytheon Technical Services
  - Mission critical, high consequence skills and competencies
  - Trains more than 2 million people a year
  - U.S. Army soldier, NASA astronaut, Air Traffic Controller

- Raytheon Professional Services
  - 1,000 learning professionals
  - 95 countries and 27 languages
  - Learning solutions designed to meet critical business challenges
Onboarding & Knowledge Transfer

Key Takeaways

– Definitions of onboarding & knowledge transfer
– The importance of onboarding & knowledge transfer in high-consequence environments
– The effectiveness of training organizations at onboarding and knowledge transfer
– Greatest challenges associated with onboarding & knowledge transfer
– The negative impact of ineffective onboarding and knowledge transfer programs
– Best practices for improving onboarding and knowledge transfer programs
Onboarding & Knowledge Transfer
Onboarding & Knowledge Transfer

- Research Demographics

- Technology (Computers, Software, ISP, etc.)
  - 13.3%

- Banking/Finance
  - 7.6%

- Business Services/Consulting
  - 7.6%

- Education (K-graduate)
  - 7.6%

- Health care
  - 7.1%

- VP or other Executive, 12.6%
- HR/T&D Manager, 24.1%
- HR/T&D Director, 10.6%
- Consultant, 6.8%
- Specialist, 8.2%
- Trainer/Instructor/Designer, 9.7%
- Consultant, Roles within HR/T&D, 6.3%
- Professions Unrelated to HR/T&D, 5.8%
- T&D Coordinator, 4.8%
- Sales Professionals, 4.8%
- Analyst, 3.4%
- Program Manager, 2.9%

Percentage of Responses, N=210
The process through which new employees acquire the skills, knowledge and behaviors to become effective contributors to an organization.

ONBOARDING
Onboarding

How effective is your training organization at onboarding?

- Very effective: 11.6%
- Somewhat effective: 54.4%
- Somewhat ineffective: 23.3%
- Very ineffective: 10.7%

Percentage of Respondents, N=206
Onboarding

- Importance in High-Consequence Environments
Onboarding

Question

– What are the primary challenges to developing a great onboarding program?

• Please provide your responses using the question pane.
Onboarding

DURATION

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 day or less</td>
<td>17.8%</td>
</tr>
<tr>
<td>2 days</td>
<td>7.7%</td>
</tr>
<tr>
<td>3 days</td>
<td>4.8%</td>
</tr>
<tr>
<td>4 days</td>
<td>3.8%</td>
</tr>
<tr>
<td>1 week</td>
<td>13.5%</td>
</tr>
<tr>
<td>2 weeks</td>
<td>11.5%</td>
</tr>
<tr>
<td>1 month</td>
<td>9.1%</td>
</tr>
<tr>
<td>Longer than 1 month</td>
<td>21.2%</td>
</tr>
<tr>
<td>No formal onboarding</td>
<td>10.6%</td>
</tr>
</tbody>
</table>

INVESTMENT

- Entry-level onboarding, 43.7%
- Leadership onboarding, 14.7%
- Middle management onboarding, 14.8%
- Technical skills onboarding, 23.1%
- Other, 3.7%

Percentage of Responses, N=208
Onboarding

- To align programs with business goals, learning leaders shared the following best practices:
  (in order of most to least often mentioned)
  - Ensure leadership involvement & support
  - Continuously evaluate training & make changes accordingly
  - Involve all stakeholders during the design, development, delivery & review
  - Start with business goals and then build an onboarding framework
  - Incorporate some form of coaching or mentoring
  - Include ongoing reinforcement on key principles
The process through which experienced employees share or distribute their knowledge, skills, and behaviors to the employees who replace them.
Knowledge Transfer

How effective is your training organization at transitioning knowledge from experience employees to their replacements?

- Very effective: 2.9%
- Somewhat effective: 38.9%
- Somewhat ineffective: 36.0%
- Very ineffective: 61.1%

Percentage of Respondents, N=208
Knowledge Transfer Practices

Poll Question

Which of the following practices is most effective for leveraging the knowledge within your organization?

- Work shadowing
- Coaching
- Short-form content (e.g., job aids, reference guides)
- Knowledge repository/e-library/wiki
- Mentor networks
Knowledge Transfer

Which of the following does your company employ as a part of your knowledge transfer strategy?

- Coaching: 40.7% Effective Group, 49.4% Ineffective Group
- Work shadowing: 48.8% Effective Group, 64.2% Ineffective Group
- Short-form content (e.g., job aids, quick reference guides): 40.7% Effective Group, 56.8% Ineffective Group
- Mentor networks: 22.0% Effective Group, 49.4% Ineffective Group
- Knowledge repository/e-library/wiki: 35.8% Effective Group, 46.9% Ineffective Group
- Desktop process and procedure updates: 30.1% Effective Group, 45.7% Ineffective Group
- Paired work: 31.7% Effective Group, 43.2% Ineffective Group
- Short e-learning pieces: 30.9% Effective Group, 43.2% Ineffective Group
- Narrative transfer: 27.2% Effective Group, 27.6% Ineffective Group
Knowledge Transfer

- Importance in High-Consequence Environments
Knowledge Transfer

Question

– How has an ineffective knowledge transfer strategy negatively impacted your organization?

• Please provide your responses using the question pane.
Knowledge Transfer

Learning leaders said their greatest knowledge transfer challenges are: (in order of most to least often mentioned)

– Lack of a formalized approach
– Limited resources (e.g., time, staff, budget)
– Collaboration and consistency throughout the company
– Accurately and efficiently capturing, translating, organizing and storing information
– Stakeholder cooperation and involvement
– Keeping knowledge centers organized, relevant and current
Knowledge Transfer

To improve a company’s knowledge transfer strategy, learning leaders cited the following best practices:
(in order of most to least often mentioned)

– Facilitate peer-to-peer and team training
– Develop a formalized knowledge transfer strategy
– Deliver information and training in a variety of methods
– Have a single knowledge repository that is relevant, organized and frequently updated
– Review and measure program effectiveness, modifying as needed
– Ensure leadership support and involvement
Turnover

Poll Question

– In which department does your organization experience the highest turnover?
  • Customer Service
  • Information Technology (IT)
  • Operations
  • Sales
  • Other
Turnover

Which three departments within your company have the highest turnover?

- Customer Service: 54.9%
- Sales: 49.5%
- Information Technology (IT): 35.9%
- Operations (Manufacturing-related): 32.6%
- Marketing/Advertising: 23.4%
- Finance & Accounting: 19.6%
- Human Resources: 13.6%
- Research and Development (R&D): 12.5%
- Other*: 12.5%
- Procurement: 6.5%

Percentage of Respondents, N=184
Turnover

For which department would high turnover have the greatest negative impact on your business?

- Sales: 30.1%
- Customer Service: 20.2%
- Operations (Manufacturing-related): 15.0%
- Information Technology (IT): 10.9%
- Research and Development (R&D): 6.7%
- Finance & Accounting: 4.1%
- Other*: 3.1%
- Human Resources: 2.6%
- Marketing/Advertising: 2.1%
- Consulting: 1.6%
- Designers/Architects: 1.6%
- Procurement: 1.0%
- Administrative Staff: 1.0%

Percentage of Respondents, N=193
Onboarding and Knowledge Transfer

Best Practices

– Develop a strategy. Formalize it. Stick to it.
– Continuously evaluate your programs, and update them accordingly.
– Facilitate peer-to-peer and team trainings, specifically coaching & mentor networks.
– Offer continuous training and reinforcement for new and transitioning employees.
– Ensure leadership support and involvement.
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