



# Onboarding New FAO Employees

Meeting the staffing needs of a complex and ever-changing environment through successful onboarding practices.

# Agenda

- Onboarding Defined
- The Importance of Onboarding
- WGU's Onboarding Process
- Do's and Don'ts of Onboarding
- Technology
- Measuring Success
- Questions





# Onboarding Defined

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Why onboarding and orientation are not the same thing

# What is Onboarding?

**Employee Onboarding is the "process of helping new hires adjust to social and performance aspects of their new jobs quickly and smoothly, and learn the attitudes, knowledge, skills, and behaviors required to function effectively within an organization."**

# Orientation and onboarding are not the same thing

Orientation is part of the onboarding process. It typically has a narrow scope focusing on a high-level introduction to the company and its mission and values and administrative items such as benefits.

Onboarding is a more comprehensive and ongoing process that builds employee engagement, defines their specific role in the organization, and prepares employees to be successful in their roles within the organization.

Orientation	Onboarding
Focus on role in company	Focus on role in department
Duration: one-time event	Duration: sequence of events
Transactional in nature	Strategic in nature
Facilitated by HR in a classroom	Integrates multiple individuals and functions on the job
Highly administrative	Personalized
Occurs on day one of employment	Begins before day one
Outcome: ready for training	Outcome: ready to contribute
	Maximizes employee engagement
	Improves retention



# The Importance of Onboarding

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How a successful strategy can benefit your organization

# Ask the Audience

Does your institution do a good job onboarding new employees?



Does your department or team have a written plan for onboarding?

Do you have a budget for onboarding?

Who is responsible for onboarding in your institution?

HR?

Direct supervisors?

Don't know?

## Survey says...

12% of employees agree that their organization does a good job onboarding employees

20% of turnover happens within 45 days

10 x as many people quit by their first year vs the five year mark

25% of employers admit onboarding does not include training

35% of companies report spending \$0 on onboarding

69% of employees will stay with an employer if they have a great onboarding experience

6 – 9 months' salary cost to replace an employee



# A positive onboarding experience leads to positive outcomes:

- 24% reduction in turnover
- 41% reduction in absenteeism
- 17% increase in productivity
- 10% higher customer ratings
- 69% of employees will stay for at least 3 years if onboarding is good

## TOP 4 BENEFITS OF A BETTER ONBOARDING PROCESS



A blue-tinted photograph of graduates in caps and gowns, with the text "WGU's Onboarding Process" overlaid. The graduates are looking in various directions, some smiling. The text is centered and underlined.

# WGU's Onboarding Process

# WGU Background

- Non-profit, founded in 1997
- 117,000+ students in all 50 states, 154,000+ graduates to date
- 60+ degree programs in 4 colleges (Teachers College, College of Business, College of IT, College of Health Professions)
- Completely online, competency-based education
- Academic Year is two consecutive 6-month terms, monthly starts
- Low Tuition and COA, "all you can learn" model
- Approximately 70% use financial aid to pay for school



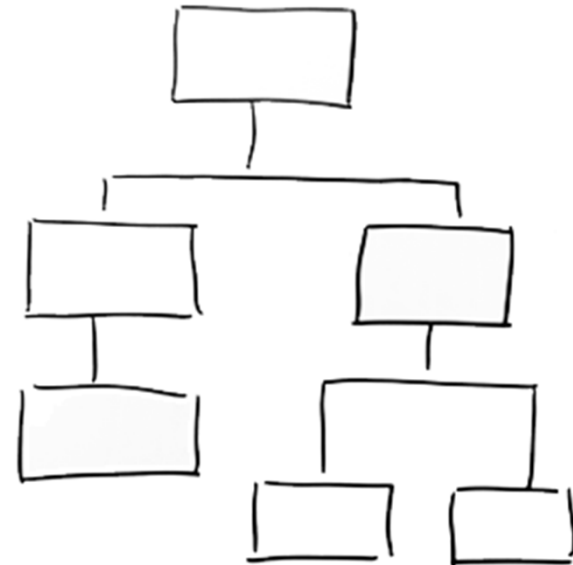
# WGU Financial Aid Department Structure

- **Financial Services**

- Student-facing contact center
- ~50 employees take calls and respond to emails from students
- Over 1,000 interactions/inquiries per day

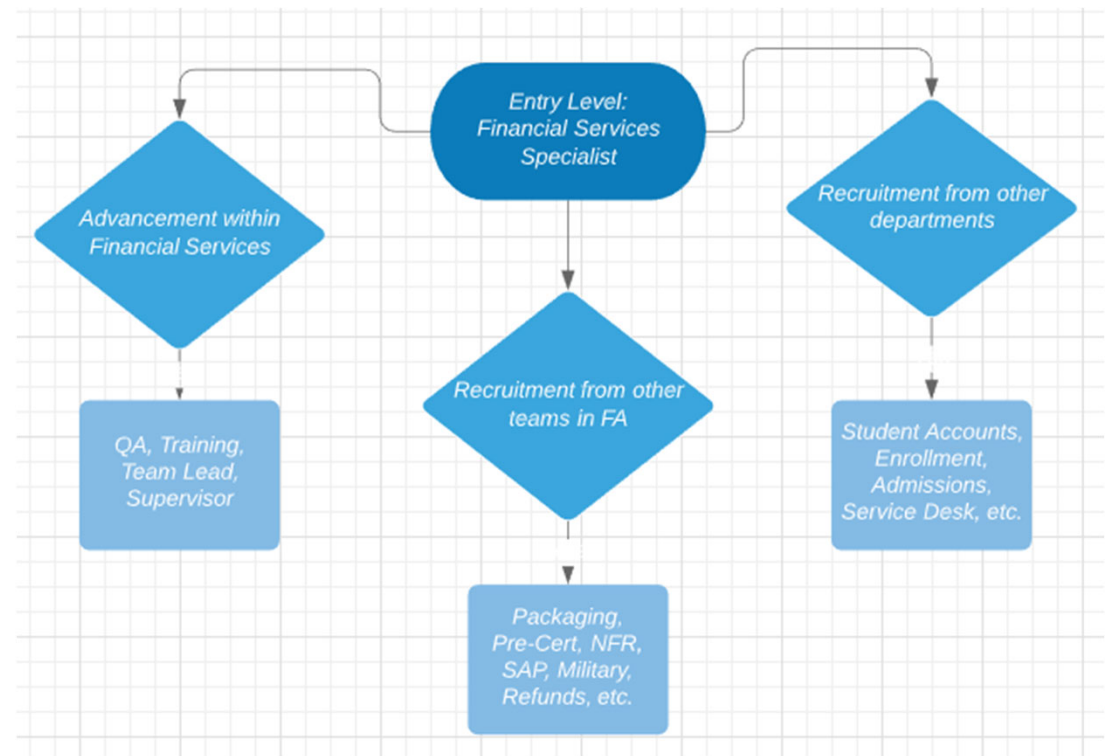
- **Financial Aid**

- Back office processing
- ~80 employees
- Includes several teams: Pre-Certification, Packaging, Refunds, Non-Federal Resources (NFR), SAP/Readmissions, Counseling



# FA Employee Lifecycle

- Financial Services (FS) is the most common entry point for external hires.
- Advancement opportunities within FS
- Other FA teams and other WGU departments recruit from the FS talent pool
  - This allows for an easier onboarding process.
- Onboarding for other teams is significantly shorter and less intense when hiring from the FS talent pool



# Why Onboarding is Important to us

- WGU has a strong organizational culture
- We hire frequently in Financial Services
- Entry level Financial Services employees often lack prior FA experience
- Financial Services is the talent pool for FA teams and other WGU departments
- Positive employee experience translates into a positive student experience
- Improves our employee engagement, morale, and retention

# Onboarding Road Map

## RECRUITING

- Explain the role- be realistic
- Consider fit within the organizational culture

## JOB OFFER & ACCEPTANCE

## DAY ONE

- Orientation with HR
- Tour the floor
- Meet new coworkers
- Set expectations
- Discuss week one agenda
- Assign a mentor
- Help them set up their workspace
- Provide contact information

## FIRST 30 DAYS

- Check in
- Start performing job duties independently (with a mentor)
- Offer feedback

## FIRST 90 DAYS

- Check in
- 90-day performance evaluation
- Set goals

## INTERVIEWING

- Think about fit
- Explain the role- be realistic
- Discuss expectations

## PRIOR TO DAY ONE

- Request systems access
- Set up their workspace
- Send a welcome letter
- Provide an agenda for the first week

## WEEK ONE

- Verify they have the tools they need
- Training begins
- End of week check in

## FIRST 60 DAYS

- Check in
- Discuss the onboarding process; what went well and what needs improvement

## FIRST YEAR & BEYOND

- Complete training
- Continual development
- Performance evaluation





# Do's and Don'ts of Onboarding

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## DO...

- ...build flexibility into your onboarding strategy to account for individual differences.
- ...take a long-term approach. The average employee takes 6-8 months to reach full productivity, and they'll need support to varying degrees throughout and even beyond that time period.
- ...schedule 30/60/90 day follow up meetings with the new employee on their first day.
- ...assign new employees a mentor or go-to person early on.
- ...remember to introduce the new employee to their team and other key people that they'll be interacting with.

# DON'T...

- ...wait to communicate until the employee's first day.
- ...forget about "re-boarding" for employees who are promoted, transferred, or return to work after a period away.
- ...ignore the hand-off from recruiters/interviewers to the new employee's onboarder and direct supervisor.
- ...leave out providing your new employee with institutional training



# Technology

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Leveraging technology to simplify the onboarding process.

# How technology can support the onboarding process

- Communicating prior to day 1
- Day 1 orientation
- Training remote employees
- Progress tracking
- Provide data to support future onboarding decisions
- Solicit feedback from new hires about the material
- Reduce burden on managers and co-workers
- Promotes consistency



# Integrating technology into the FA onboarding process

- Utilize online training resources available through the Department of Education, NASFAA, IFAP, and regional associations.
  - Department of Education - [Fsatraining.ed.gov](https://fsatraining.ed.gov) - Fundamentals Training Series Program, Financial Aid Administrators Tool Kit, Training Modules, Webinars, etc.
  - NASFAA – live and on-demand webinars, NASFAA U courses, self-study guides
  - IFAP - <https://ifap.ed.gov/ifap/training/index.jsp>
  - RNASFAA – webinar recordings
- Institutional LMS
  - Can be as simple as a shared document repository with process documents and other onboarding resources
- Training remote employees
  - Screen sharing
  - Video conferencing platforms: Microsoft Teams, Google Hangouts, Webex, Zoom, etc.

A blue-tinted photograph of a group of graduates in caps and gowns. The graduates are smiling and looking towards the right. The text "Measuring Success" is overlaid in white, centered horizontally. A thin white horizontal line is positioned below the text.

# Measuring Success

# Measurements of Success

- Employee retention rates
- Survey data
- QA and other performance metrics
- Quizzes and knowledge checks
- Feedback in 1:1 meetings
- Skip-level meetings
- Performance reviews and regular feedback



A blue-tinted photograph of a group of graduates in caps and gowns. The graduates are smiling and looking towards the right. The word "Questions?" is overlaid in white text in the center of the image. A thin white horizontal line is positioned below the text.

Questions?





Thank you.



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