

Employee Onboarding at Society of Grownups

Project Team

Andrew Pucci (designer)
Nondini Naqui (stakeholder)
Dianna Sawyer (content strategist)

Responsibilities

Project Leadership
Employee Research
Process Documentation

Tools Used

Individual Interviews
Task Analysis
Google Docs

What is Society of Grownups?

Society of Grownups was a MassMutual learning initiative founded to democratize financial literacy.

Challenge

Early on, I recognized that our onboarding process was holding up productivity. People would sometimes start weeks before their computers arrived, leaving them with little agency to get anything accomplished. Instead, we wanted employees to feel welcomed.

Introduction

At the time of this project there were about 15 people at Society of Grownups. We were a startup funded by MassMutual, a large insurance company. Though we were actually MassMutual employees, our customer-facing and employer brand was separate. Regardless, all hiring activity was coordinated through Human Resources at MassMutual.

After we hired a few new team members, I realized that our lack of onboarding process was disheartening new employees. Especially when starting a new job, people like to make a positive first impression. Due to no fault of their own, it was hard to do that here. Sometimes, people started weeks before their computers arrived. Or if they did have a computer, access to required resources was unavailable.

I brought these observations to Nondini Naqui, the CEO. After a discussion, we decided that I should focus my design lens on this problem. We needed a better understanding of the challenges faced by new hires to address those issues. I started by interviewing a few of the most recent hires about their onboarding experiences. I found that, besides the challenges we were having in hardware logistics, folks didn't know how their work would help the company succeed.

A plan begins to form

I decided to experiment with three separate changes:

1. Building out a comprehensive onboarding checklist template, including completion timelines and task assignments to be used by the hiring team to make sure we don't miss anything.
2. Stockpiling standard equipment so we reduce the amount of time needed to provision laptops and other necessary items.
3. Developing an "onboarding buddy" program to pair an experienced team member with each new hire for the first 2 weeks.

Onboarding checklist

At first, I created and shared a Google doc with the person responsible for the new hire and our IT contact. Most of the time, this worked well but there were a few drawbacks.

This process required a lot of active work from me to keep things updated, especially as we ramped up hiring. It was also a challenge to make sure that specific tasks were being followed up with on time. There was no accountability built into the document; it required regular follow up.

As we continued growing, we adopted Greenhouse Onboarding to help keep everyone on the same page. It had features to notify people when they need to complete tasks and kept me informed when things became past due. This quickly became essential and did a lot to improve the new employee experience.

New Employee Onboarding Process

Responsibilities:

- OB = Onboarding Buddy
- OPS = Operations Engineer
- MGMT = "Hiring Lead"/Nondini/Cassandra
- CO = Compliance Officer
- WL = Workstream Lead

Offer Made

1. MGMT: Determine Onboarding Buddy. Onboarding Buddy will be responsible for making sure that this entire process is completed for New Employee.
2. MGMT: Determine Onboarding Buddy. Onboarding Buddy will be responsible for making sure that this entire process is completed for New Employee.
 - a. If email needs to be monitored, send new employee's full and HR email addresses to:
 - i. Michael Balle: michael.balle@company.com
 - ii. Dan Branson: dan.branson@company.com
 - iii. [Redacted]
3. OB: Obtain welcome card for new employee, have team sign it, and either send to new employee or keep it around to give to the new employee on their first day.
4. MGMT: Create a Trello card in the Hiring board (if one does not already exist), with their name, role, and start date
5. OPS: Work with [Redacted] to set up new employee in [Redacted].
 - a. Each person must be assigned as a Developer and receive their choice of laptop, keyboard, mouse, monitor and receive a 2" Thunderbolt Display, and Apple Keyboard, Magic Mouse, or keyboard will not receive with peripherals or software. Ops will forward an onboarding kit to Lynn Pines and the onboarding team who will order as necessary:
 - i. Laptop
 - ii. iPhone and phone contract
 - iii. Monitor(s)
 - iv. Mouse
 - v. Keyboard
 - vi. Apple Watch (required for VPN access and physical security)
 - vii. [Redacted]
6. OB: Obtain a passport-like photo (meaning solid background and looking directly at camera) from new employee and provide to [Redacted] to have access badge created

One week before start date

1. OPS: Create Google Apps account (includes Gmail, Drive, etc.)
2. OPS: Add employee to [Redacted] Google Group
3. OPS: Add employee to any other group-specific Google Groups (Dev-group, etc)



Equipment process improvements

We were having a hard time getting laptops, keyboards, mice, and phones for new employees fast enough. Especially since MassMutual did not use Macs and iPhones like we did, there was no equipment cache that we could draw from. We needed to buy equipment direct from Apple.

I worked with our IT support staff to develop a procurement plan that aligned with our hiring expectations. This helped build a small stockpile that enabled us to provision equipment quickly, even in times of rapid growth. This reduced (and in most cases eliminated) the time new hires spent waiting for equipment when they started.

Onboarding buddy program

One thing we kept hearing during interviews was that they didn't know how their efforts fit in with the goals of the company. After discussions with the CEO, we agreed the failure seemed to be a growing siloing of teams.

To help meet others outside their team, we assigned an onboarding buddy to each new employee. This buddy was usually from another workstream. The buddy introduced them to folks throughout the company and answered questions about "how things get done here." They were not responsible for getting them up to date on project requirements or team dynamics. This program was a resounding success. After implementation, we saw a rapid increase in engagement and happiness among new employees.

I also founded an onboarding circle. This group of people helped refine the onboarding process as we progressed. We invited each new employee to attend the next onboarding circle meeting to share their feedback. Often, new employees were so happy with this that they decided to join the onboarding circle and volunteered to become onboarding buddies themselves.



Conclusion

As we iterated on this process, we learned that we needed to help new employees understand the relationship between Society of Grownups and MassMutual.

Certain things that were MassMutual requirements did not fit the culture we had at Society of Grownups. I spent a lot of time speaking with the MassMutual HR department to help smooth those concerns out.

Overall, this project led me to dive deeper into process improvement and was the impetus to changing my title to Culture Architect.