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### Onboarding Is a Two-Way Street

Carol Wittmeyer

St. John Fisher University, [cwittmeyer@sjf.edu](mailto:cwittmeyer@sjf.edu)

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## Onboarding Is a Two-Way Street

### Abstract

Editor's Note: This is the second in a series about professional development opportunities for potential family business successors. The first article considered the value of outside experience. This article will discuss the importance of onboarding. The final article will address individual development planning based on the potential successor's strengths, weaknesses, opportunities and threats.

One of the exciting possibilities in starting a new job is learning something new – about an organization, its culture and the specific job responsibilities that one may have. When a new hire is a member of the owning family, special opportunities and challenges arise. It is incumbent on both the family employer and the family member to create and implement strategies for onboarding success.

### Disciplines

Business

### Comments

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## Transitioning into the Family Business:

# Onboarding Is a Two-Way Street

CAROL WITTMAYER, ED.D.

*Editor's Note: This is the second in a series about professional development opportunities for potential family business successors. The first article considered the value of outside experience. This article will discuss the importance of onboarding. The final article will address individual development planning based on the potential successor's strengths, weaknesses, opportunities and threats.*

One of the exciting possibilities in starting a new job is learning something new – about an organization, its culture and the specific job responsibilities that one may have. When a new hire is a member of the owning family, special opportunities and challenges arise. It is incumbent on both the family employer and the family member to create and implement strategies for onboarding success.

Global research on family firms suggests that, more and more, families in business desire to treat their family employees the same as non-family employees, especially as the employees grow and work to be more “professional.” For example, many companies stipulate that family members can apply only for an open position. In other words, positions will not be created for them. If the goal behind that thinking is to make sure that every employee has the proper background for a specific position, it sounds reasonable. However, if the goal is to make sure that family employees get the best start possible, including starts that carry the potential to become leaders of the business, then a different approach may be more beneficial.

Either way, onboarding of new employees is an important component in business success. It should be a two-way street – and goals should be set together by the business leader(s) and the new family employee(s). Therefore, it's important to explore an approach to the onboarding process that expects input from both the business and the employee.



Carol Wittmeyer, Ed.D.

### Typical Onboarding: Quick and Dirty Introduction

Many organizations have new employee orientations, whether the employee is related to the owners or not. Typically, orientation lasts a day and covers such topics as company history and goals, website security and other policies and procedures, overall expectations, and signing up for employee benefits. Usually, there are also company tours and introductions of co-workers. Employees receive information at a fairly rapid clip and sign a lot of paperwork.

The orientation is typically treated as a single event rather than a process.

A study of 264 new employees published in the *Academy of Management Journal* found that the first 90 days of employment – often called a probationary period – are pivotal to building rapport with the company management and coworkers. When support levels were high from the team and leaders, new hires often had more positive attitudes about their jobs and worked harder. When support and direction were not regularly offered, the inverse occurred, leading to unhappy and unproductive employees who didn't make it much further than four months.

Additionally, a study by the Wynhurst Group found that when employees go through structured onboarding, they are 58% more likely to remain with the organization after three years.

Clearly, the first 90 days are important; the first few years are, as well. Think about management development programs you've heard about for young folks entering banking, manufacturing and other professions. The investment is never a one-day orientation; instead, it's a long-term one that prepares them for success based on having a broad knowledge of the business. Why not do the same in family firms, especially when young folks are likely to “inherit” (or, more likely, to purchase) the business once they've become long-term employees?

Below is a table outlining tasks and responsible parties involved in creating an onboarding program.

Task	Business Owner	Family Employee
Pre-first day at work	<p>Develop/provide materials on background of company, industry and other key stakeholders (large suppliers, customers, service providers, etc.).</p> <p>Provide employee bio to everyone scheduled to meet with him/her.</p> <p>Create a management development program for the new family employee. External assessments can help managers understand the employee's strengths and weaknesses, which is helpful in framing goals and assignments. A plan with "department rotations" can also help the employee learn all facets of the organization and be mentored (even for short stints) by qualified and interested mentors (family and non-family). Some mentors will be for short-term goals; at least one non-family member should be a mentor for the duration of the program. Review the plan with all parties.</p> <p>Consider both networking and membership possibilities for new hires, such as potential colleagues in NSRA, regional chambers of commerce or vendor reps.</p>	<p>Set goals for success. These might include saying "I will:"</p> <ul style="list-style-type: none"> <li>&gt; implement my values of respect, integrity and hard work.</li> <li>&gt; use mnemonics to remember names.</li> <li>&gt; ask questions of every person I meet with – such as, what's one piece of advice you have, is there someone you believe I should meet, etc.</li> <li>&gt; To show responsibility, I plan to arrive early and stay late often.</li> </ul> <p>Research the company website, and search for news on the company and the industry.</p> <p>Request (and even propose) mentors.</p> <p>Review and propose potential industry networks to join, such as community business peers and family business next generation programs.</p>
	<p>Announce the hiring to the company's employees and to the family. Include information about the position, the onboarding process and the start date.</p> <p>Include a list of key stakeholders that the family employee needs to know.</p> <p>Meet with individuals who will be hosting new employee during orientation time.</p>	<p>Develop a list of questions from the research already done. Learn the names/roles of key stakeholders who will be introduced during onboarding.</p>
	<p>Organize the first day. Start with fellow employees, including ongoing mentors. Prepare them with background info on the new hire, and expectations.</p>	
First few days	<p>Demonstrate and explain typical start-up activities, focused on key individual introductions, processes and tours. (Learn the stock room, understand check-out, study the "script" for greeting customers, and so on.)</p>	<p>Take notes throughout the day of individuals met and information they share with you. Plan to review/study the notes later, and do so.</p>
	<p>Facilitate one-on-one sessions with mentors and share expectations with them.</p>	
Years 1 and 2 speak to rotations, feedback and goal-setting	<p>Once the initial orientation and start-up activities are complete, the new employee should rotate through all major divisions every few months. Non-family supervisors should be hand-selected and regular feedback sessions should be scheduled.</p>	<p>Take each rotation seriously, making notes, asking questions and scheduling regular feedback sessions with appropriate supervisors.</p>
Management Development Program Completed	<p>Celebrating the end of the program should be a planned event/ritual.</p> <p>As the training program comes to an end, having a game plan regarding the employee's next steps is important, because it helps the employee appreciate that this is a career, not "just" a job. The game plan might include longer-term appointments in various roles (such as internet marketing, accounting, photography for ads, dressing windows) where the employee has expertise, or needs to gain experience.</p> <p>Ongoing mentoring and other development opportunities are an essential part of the next career steps.</p>	<p>Family employee should request regular feedback sessions from family leaders, non-family mentors and even lateral peers.</p>

In a retail setting, onboarding involves many "departments." In some stores, they may be categorized as marketing, public relations, floor management, internet sales management, product departments (men's, women's, children's, pedorthics, athletics, socks/hosiery), job responsibilities (sales, cashiers, telephone operators, billing/accounts receivable specialists). In other departments (men's, women's, children's, store categories may be described more generally, perhaps as inventory, brands, proper fitting, customer service, business transactions, "product receiving" procedures, product transfers

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between stores, check policies, returns policies. Helping new hires understand the breadth of responsibilities also helps them see that retailing is much more than a job – it's potentially a very challenging yet rewarding career.

Preparing a strategic and long-term Next Generation employee development program is a powerful strategy.

It helps assure that the founders' vision is realized, keeping the business in the family and providing entrepreneurial opportunities for future generations. On the technical end, employees learn all about the business, which strengthens their credibility and confidence. On the personal end, they begin quickly to establish networks that will be useful for decades. The "outside" networks will be individuals facing the same challenges; the "inside" networks will, as many

NSRA members know, include non-family employees who become like family – and involving them in training the family's next generation of leaders helps everyone who works there to keep the family business thriving. ■

*Carol Wittmeyer is a faculty member with Chicago's Loyola University Family Business Center, a founding faculty member of NSRA's NextGen initiative, and an emerita professor of management at St. Bonaventure University.*