– Hey, and welcome to "PCTY Talks." I'm your host, Shari Simpson. During our time together, we'll stay close to the news and info you need to succeed as an HR pro. And together, we'll explore topics around HR thought leadership, compliance, and real life HR situations we face every day. Joining me today on the podcast is Andre Mayes. He is a program manager in our Organizational Learning Department here at Paylocity and he is a jack of all trades when it comes to new employee orientation and onboarding. So Andre, thanks for joining me.

– Oh, for sure, Shari. Thank you for inviting me.

– So we have spent a lot of time here trying to figure out the best combination to bring employees on board and get away from that idea of completely overwhelming them and/or just making it, frankly, really boring. And so Andre has spent a lot of time in that space. So I wanted to talk through kind of what we've done here and how we've approached new employee orientation and onboarding. But to set the stage, I think it's good for us to understand when we talk about onboarding, what do we specifically mean? So let's start there, Andre. How do you define onboarding?

– Thank you, Shari. That's a really good question. So what we've kind of defined at Paylocity as far as onboarding is really kinda starting with the pre-boarding process, right? So when the employee receives that offer letter and they are going to join the organization, what does it look like? How are they going to receive their communication and how are they going to move throughout the organization throughout their career? So when we think about it, it's the pre-boarding process, but it's the idea of getting the employee immersed into all of Paylocity's cultures and understanding the different values that we represent as an organization and ultimately, so that they could see their path through their organization. So a lot of our team members come in as entry-level employees. So to be able to see where I could go within the organization by using my skills and my talents and align them to my purpose is essentially how we've kind of outlined and defined onboarding here at Paylocity.

– And our onboarding program is pre-boarding through first year?

– Yeah, first year. And we even take that through like the first 24 months. So we've provided resources to kinda set the employee with the resources and the tools that they need, but for them to be able to kinda take their path at their own pace.

– How did we land on what we think is important to get right? And the reason I ask that question is 'cause I think that there's like the check-the-box stuff and then there's the creating an experience. So when we think about getting it right, what is it that we're thinking about we need to nail correctly?

— So it's really important to get it right, Shari, because, so what are we chasing? What is the goal? What are we ultimately trying to solve for? And so what we were finding was that the workforce today is changing. We needed people to be more connected with the organization that they're going into. And so if you think of previous generations where it was more so "I come to work and I get my check and I go home," today's workforce is completely changing, especially with the introduction of those Gen Zs, right? So how do I find my purpose? How do I find the skills that I have as an individual? And how can I align those to the organization's values and to what the organization stands for? So it's important to get it right to make sure that we maintain the employees that we have and we retain the talent that we have as an organization to continue to grow as quickly as we have, for sure.

— When you started to tackle this project, and I'll be fully transparent, we've tackled this project many times in many different ways over many years. You know, I've been here six years and we've done it at least three or four times, but I do think this last time we finally got the secret sauce.

— I hope so.

— So how did you approach, I mean, I guess get really tactical. How did you approach designing our onboarding program? Because it's such a big endeavor and for those listening, I'd love for them just to hear what are the things you consider, what are some of the obstacles and what are the wins that you had as you were thinking about putting this program together?

— Yeah, so as I said, like retention was really the biggest factor that we were going for. And so in order to retain the talent, in order for us to make sure that people saw what we were as an organization, especially with the growth that we have in the organization that we're in, we wanted to be able to maintain that culture in some way. Obviously, culture, being dynamic, is always changing. But we wanted to kinda bottle how people were feeling when they first started with the organization. So we really went to every business unit within the org to really get an understanding of what their team members were missing. And so there are a lot of tactical things, obviously, knowing where things are, knowing where different resources are for them to be able to be successful in their roles. But what was really missing was really the ability to feel that I am a part of something bigger or to feel that the role that I came in in isn't the role that I needed to or that I have to retire with, right? So what do I need? Or how could I navigate myself through this organization? So after we found out all those tactical things that all of the different departments needed, we really wanted to get down to the feeling. What did we want our team members to feel and to kinda explore within themselves? And so we really focused on the purpose. And that's really something that's important, as you've heard it in many different cases across the

workforce today, finding your purpose is super important. And once you've found that, and once you've found that why and understand what you're doing and what you need to do, then you can really go out for those roles and opportunities that are really for you. And so that's what we did. We took the tactical pieces, then we took the feeling, what did we want people to feel? And then we started then started getting the rest of the organization on board. What did they need to do in order to make sure our employees were feeling seen and feeling that they had a place here at Paylocity?

– I like that approach because I think it wraps your content around how do you want the employee to feel as they walk away in that moment. And that doesn't mean that you're still not gonna do the check the boxes around like where do I find my paycheck? How do I do direct deposit? How do I sign up for benefits? Where do I find all those resources? You can do that in a way where now there's an emotional attachment to it and it's gonna have better retention just from a knowledge perspective. So I really like that we took that approach. As you've iterated on this program, or as you've led this program over the last couple years, how are you measuring success? Are you looking at turnover rates? Are you looking at promotions? How have you guys decided to make sure that this program is indeed working the way we thought it was gonna work?

– Yeah, for sure. So this is a little bit of a challenge, right? Because this is something that hasn't been done in the organization, so we don't have any stats or any data to hold any of our results on. So we really needed to make sure that what we put in place we could put in place for a while so that we'd be able to measure and see what we needed to change later on. But what we're trying to solve for are some of the questions that come up in various employee surveys or there's "I don't have a path," or "I don't see a future here at Paylocity," or "I don't know what my resources are," "I don't know where things are to make me feel successful in my role." And so by surveying our team members and kinda getting a better understanding of what they need and what's important to them, we've kind of put these things together. And so from there, we'll measure the success and we'll take a look at maybe a journey of one of our employees, you know? We'll say employee A went to maybe these different workshops and it allowed them to feel this way when they were able to apply for different roles in the organization or whatnot. So the measurements are a lot based on the employee feeling and the employee sentiment across the organization, but allowing the employee to have their own journey and understand that the resources and tools are there for them.

– How often are you surveying those that participated? Because one of the things I've found, when you're trying to understand the effectiveness of your onboarding program, it's almost like you can't go back and ask previous employees what their experience is because

you're only gonna experience new employee orientation or onboarding one time. So there's specific metrics you've looked at, turnover being one of 'em. Is there other metrics you look at?

— Yeah, Shari, so we look at the employee sentiment with their manager. Do they feel that they have a connection with their manager or do they feel that their manager has their best interest in mind? Or they look at, we measure how they're feeling when they start with their team. So a lot of our employees go into new employee training for a number of weeks and then they then reunite with their team members. So we wanna make sure that when they reunite with their team members, it's a smooth transition when they move into the actual organization. And so it's a little tricky at times when you think about measuring how the employee feels at certain points, but it's really about asking the right questions at the right time, right? So obviously working with the different business units and figuring out what their initiatives are and aligning the survey questions to a lot of what their business units are doing, but ultimately trying to figure out what we need to do from a organizational perspective to make them feel, again, that they're connected to the organization and that they do see a future here with us.

— That makes so much sense, aligning the questions at the right time. Because you might have somebody who's joining your organization that has six weeks of training and you might have somebody that has a week of training. So if you ask that same question at different times, you might get wildly different or inaccurate answers. So I appreciate that little nugget. As you've gone through this program, how have you iterated already on what you've created?

— That's been a huge undertaking, right? So if we think about Paylocity, we almost brought in 3,000 employees last year, right? So trying to manage the process has been a bit tricky. We've had a lot of hands in the pocket. We've got the necessary hands that are there. And what's important to us is making sure that we are taking the feedback from the surveys that we're receiving from our new hires when they start, we do a survey right when we complete new hire, new employee orientation, just to make sure that we've hit the mark. And so we make adjustments by there. So one of the biggest changes that we've made was, you know, benefits is always tricky with different organizations, right? So when you're introducing benefits to your new hires, a lot of the new hires make it about themselves. And so if you're having a team of 40 new hires, it's really difficult to answer all those benefits questions. And so what we've done is we've implemented a benefit scavenger hunt where the team members could really just kind of go through all the different resources that we have available for benefits. And to top that off, we've actually opened up benefit office hours that happens the Tuesday after NEO. And so what happens is we have our benefits team, we have about two or three of their team members that come in, and any new hire that has any questions about

any of their benefit selections, they're able to go in and have any questions answered, have any questions answered, and have our team members be able to support them as they select their benefit options. So different things throughout the program that we've changed to kinda really support the employee journey and making sure that they have everything that they need.

— And it just goes to show that there is a one size fits one approach to things like benefit offerings. Like you mention you cover it, but then you also offer this opportunity for those that have additional questions. 'Cause I suspect, if you're somebody like you and me who's been in the workforce a long time, we might not need that extra handholding when it comes to benefits. But if it's your first time or if it's a more complex benefit environment, you have that opportunity. So I think that's definitely something, if you're listening, to consider. How do you bring a more personal feel to your onboarding program and some of the check-the-box items that you have? As we wrap our conversation, Andre, if you think about where you started and where you're at today, what are maybe a couple pieces of advice for somebody who's just starting down this road of, "Hey, I need to redo my onboarding"?

— Yeah, you know, Shari, I love this question because for me, when I came into this position, it was a little overwhelming. And so if you think about what we have from an organizational perspective, we had a bunch of different teams that were trying to solve for the onboarding issue that we had across the board. And so with the amazing opportunities that we have here at Paylocity, we really kinda unleash all of our employees to go figure it out on their own. And so one of the biggest challenges was to really get everybody aligned to really this one strategy on onboarding. And so that was one of the biggest challenges that I had. I built relationships all throughout the organization, but still, those that are really passionate about what they've been working on had been really resistant towards it. So what I would say is, hey, when you're approaching something such as onboarding, especially for the organization, it could seem like a bit overwhelming. It could seem like you're boiling the ocean and you really are in a lot of instances. But I'd say break it down into phases. That's what I had to do in order to really make it digestible for me. And so phase one was really getting all those relationships built, getting everybody aligned, making sure that everyone understood that, "Hey, I'm going to take what you all feel is important for your spaces, but I'm also gonna bring it to an organization level as well." Once I had that, I was able to then start phase two, which was every department, really getting into their business, really understanding how those team members were coming on board. What are your team members missing? What do they need? What do you feel is missing? Phase three was really, now, revamping a lot of the initial tools that we built as an organization. So we started off on this journey and so now we needed to iterate on some things because it had been a little bit

and we had gotten tons of feedback from all the different working sessions that we had as an organization. Phase four is now what we're going into as an organization now is the, we're evangelizing this all across the board. We're getting all the leaders on board, we're getting everybody excited about this. Now we start really honing in on those measurements because now all of the different resources that we've created as an organization are really now starting to come into existence. And now we're really able to see this program come to life and really transform our organization. So what I would say is break it down into phases, really give yourself some time, really come up with a project plan that you could align yourself to, and then have fun, really, because this is a, I've had an amazing time building this program.

— I love the phases. I love the idea of breaking it down before you get started so you're not just putting band-aids here and there, right? You're having a plan. And your organization might decide, "Yeah, I don't wanna necessarily have a feelings-based onboarding. I might," like, there's so many options out there, but scoping the project in advance, such great advice, Andre. Thank you so much for all of that and all the work that you're doing here at Paylocity to help bring our employees on board. I appreciate you.

— Thank you, Shari. Thank you for having me and I've enjoyed it.

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