



MetLife Reimagines Group Benefits Onboarding, Slashing Early Turnover

MetLife

Best New Hire Onboarding Program

November 2024



Company Background



Company-at-a-Glance	
Headquarters	New York, NY
Year Founded	1868
Revenue	\$70B
Employees	49,000
Global Scale (Regions that you operate in or provide services to)	MetLife has operations in more than 40 countries and holds leading market positions in the United States, Japan, Latin America, Asia, Europe, and the Middle East.
Customers/Output, etc. (Key customers and services offered)	MetLife is a leading financial services company that provides insurance, annuities, employee benefits, and asset management to support individual and institutional customers as they navigate the perpetually changing world.
Industry	Financial Services & Insurance
Stock Symbol	NYSE: MET



Website	www.metlife.com
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Budget and Timeframe

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Overall budget	N/A
Number of (HR, Learning, Talent) employees involved with the implementation?	2
Number of Operations or Subject Matter Expert employees involved with the implementation?	3
Number of contractors involved with implementation	N/A
Timeframe to implement	3 months
Start date of the program	January 2023

Fit to the Needs

The Group Benefits Orientation and Onboarding program was created in response to results received from internal surveys conducted in 2022-2023 that indicated that attrition was at 12.1% with new hires leaving 90 days after start date, due to an unfavorable orientation and onboarding experience. Internal teams discovered that external new hires joining Group Benefits faced significant challenges acquiring the needed technology, systems access and getting exposure to key partners in the business. On average hiring managers were spending over 8 hours to secure required system access for their associates, as well as laptops and accessories. Due to the complexity of the processes and number of required systems needed in many of the Group Benefits roles, obtaining systems access for new hires was taking over 4 weeks to acquire.

Before the Group Benefits Orientation & Onboarding program launched, external new hires had an inconsistent training experience, and in some scenarios no training at all was provided as they started their new role. This resulted in external new hires lacking awareness of the opportunities and resources available to them at the company. Additionally, some of the external new hires shared that they did not always feel welcome at the company, and that they felt alone. One external new hire, who started previous to the Group Benefits Orientation & Onboarding



program, shared that, “I was ready to leave the company, almost as soon as I got started due to the lack of onboarding tools, training and resources made available to me. I felt isolated and ill-equipped to do my job, and I was frustrated. My manager tried to help me in building out some self-guided tools and resources that I could review to try and learn my role, and learn about the company, but it was an awful experience. I stayed due to my manager sharing this experience was changing and that the company recognized this as an area of opportunity and was working on a solution. My manager did not have the time or bandwidth to give me a comprehensive orientation and onboarding experience.”

It required hiring managers on average anywhere from 8 to 32 hours to onboard an external, new hire. The issues within the new hire orientation and onboarding process had significant impact on the associate experience and productivity.

The Group Benefits Orientation & Onboarding program is an experience developed for external new hires starting their career at the company, which offers training, tools, and resources to help set new hires up for success in their new role. The program manages to the acquisition of necessary equipment, systems access, securing of office space, and a 2-week cohesive orientation program welcoming new hires to the team.

Leaders from across the Group Benefits business connected on a regular basis and participated in a series of intake sessions to determine what goals should be established to meet the gaps identified in the orientation and onboarding of external, new hires. It was determined that the following objective, goals, and key results would be used as a guide to define and articulate the outcomes that the business wanted to achieve.

Objective: Create an onboarding experience that maximizes associate performance.

Goal: Provide 100% of new hires with the technology, systems, and an orientation experience that sets them up for success in their new role.

Key Results Established:

1. 100% of the new hires have the required technology on their start date. Prior to the Group Benefits Orientation & Onboarding program being launched, most new hires did not always have a working laptop and accessories on their first day in the role, and they did not know when they were going to receive these items. In partnership with the technology team, the resources on the Group Benefits Orientation & Onboarding team centralized the technology acquisition process, ensuring all associates have a working laptop and accessories on their start date. This alleviated the heavy lifting for hiring managers having to manage to this process, as there were many instances in the past when hiring managers were spending up to eight hours to obtain a computer, accessories and the systems access needed for their new hires. 99% of the new hires that went through the Group Benefits



- Orientation & Onboarding program in 2023 had the technology that they needed on their start date; 2024 is tracking to have a 100% success rate of completion, thus far. Hiring managers spend no time managing this process, since the Group Benefits Orientation & Onboarding program manages it on the hiring managers behalf.
2. 100% of new hires have the systems access required to perform their role within 2 weeks. Each new hire at the company requires the use of different systems access to manage to their role, in some cases, new hires may use up to 30 different systems; and for hiring managers to process systems access requests for their new hires could take up to 32 hours and 4 weeks for new hires to obtain access to the systems that they needed. The Group Benefits Orientation & Onboarding team collaborated with an offshore team to centralize and process systems requests removing these efforts from hiring managers. 98% of the new hires had required systems access by day 10 in their role in 2023; and 2024 is tracking to have a 100% success rate of completion, thus far. The Group Benefits Orientation & Onboarding team is also working to automate role-based systems access which will drive additional productivity.
 3. All new hires will complete a Group Benefits Orientation experience within their first month of hire. There was no orientation experience for external, new hires prior to the Group Benefits Orientation & Onboarding program being launched. Therefore, external, new hires did not have a consistent learning experience in the way of learning about the company, or a way to understand all the tools and resources available to them as an employee. This resulted in hiring managers having to try and build a learning experience for their new hires, and in many cases, hiring managers did not have the bandwidth and did not concern themselves in developing or sharing educational reference materials for their new hires to learn about the company and the tools and resources available to them. The Group Benefits Orientation & Onboarding team launched a live and virtual two-week orientation experience that any external, new hire in the line of business could be enrolled in. It has been a 100% success rate in 2023 and 2024, thus far, in offering an orientation experience to all Group Benefits external, new hires within their first month of hire. Over 279 external, new hires have completed the program and 100% of them shared that they felt welcome and oriented to the company after participating in the orientation program.
 4. Year-Over-Year improvement in 60-day new hire survey by 5+ points. The Group Benefits Orientation & Onboarding program was created because of the consistent feedback received in the 60-day new hire survey results. Overall, new hires shared their dissatisfaction with the lack of an onboarding and orientation experience being provided and shared that they did not feel



welcome at the company. Therefore, the team focused on assessing these results monthly. Hiring managers determined if the team could increase our satisfaction score by 5+ points on our 60-day new hire survey feedback and receive commentary in the results that showed positive trends in the overall orientation and onboarding of employees, then it would be considered a success. The team has surpassed the goal set and achieved an overall 7+ points increase on the 60-day new hire survey feedback, and the commentary received consistently trended positive, with comments, such as: “After completing this orientation, I know that I made the right decision to join the company. I have never had this type of comprehensive orientation nor hands-on personal attention from management. Here, you are making sure that the faith you have put in hiring me will pay off because you are actually investing in me upfront -- from the beginning and not just relying on me to do all the lifting. Thank you!” The team continues to see increased scores in 2024 in the 60-day new hire survey.

Design and Delivery

The Group Benefits Orientation & Onboarding Program is designed to be inclusive to external new hires who enter the organization throughout the year located anywhere in the United States. To offer an immersive onboarding experience, the team conducted an analysis to understand what other companies were doing to offer an engaging onboarding experience, and best practices that could possibly be adapted to build out a formalized onboarding program. Additionally, the team connected with other lines of business within the company to see if there were any existing programs or information that could be leveraged to help create an effective onboarding experience for Group Benefits, external new hires. As a result of the research conducted, the design of the onboarding program focused on the following three items listed below to create a top-notch experience for external new hires and hiring managers, including:

1. Reduce time it takes new hires to get up running – all associates have baseline technology, resources, tools and knowledge to perform role within 2 weeks of hire
2. Provide an engaging, training experience that results in all new hires having a foundational understanding of the company post completion of a formalized orientation program
3. Streamline systems access for new hires and hiring managers in the onboarding process and ongoing

A small team consisting of a Program Director and Onboarding Manager was created and tasked with building the Group Benefits Orientation & Onboarding Program. The Program Director is responsible for managing to the development and execution of the program and ensuring that it is successfully delivered on time.



The Onboarding Manager is responsible for designing a curriculum and delivering sessions in which they have the subject matter expertise, as well as managing to systems access and technology acquisition for all external new hires.

Within three months, the team was able to design an experiential orientation and onboarding program. Upon completion of the Group Benefits Orientation & Onboarding, new hires have the systems access, technology, resources, tools and knowledge that they needed to perform their role within two weeks of hire. The new hires have their laptop and accessories needed on their start date, and they have access to all systems required for their role confirmed by their second week of hire.

The Group Benefits Orientation & Onboarding team proactively reaches out to hiring managers in the weeks leading up to a new hire's start date after reviewing weekly new hire reports, as received from the Human Resources team. Hiring managers complete a survey that allows the Group Benefits Orientation & Onboarding team to obtain new hires' information needed to order the necessary equipment and to account for any accommodations needed for employees to start in their role, including their laptop, phone, accessories, systems access and securing of office space.

After completion of the intake survey provided by the Group Benefits Orientation & Onboarding team, new hires are automatically enrolled in a two-week orientation experience that is hosted virtually the second Monday of each month. Additionally, the hiring managers and new hires are then opted into a communications campaign that keep them updated on the status of their new hires' enrollment in the program, and what to expect throughout the onboarding & orientation experience. The new hires receive invitations from the Group Benefits Orientation & Onboarding team to participate in the two-week orientation experience that aligns with their start date. Insight into the of all the live, virtual training sessions, which are hosted for the new hires is shared below.



Insight into the Orientation Experience

Business Orientation	Tools & Resources	Purpose and Networking
<ul style="list-style-type: none">• Welcome to MetLife/New Hire Orientation• MetLife Overview & History• Overview of US Business and Group Benefits• Group Sales and Service Overviews• Broker Engagement• Financial Wellness & Engagement Overview• MetLife Product Suite Overview (Core)• MetLife Product Suite Overview (VB)• Virtual Presence• Goal Setting	<ul style="list-style-type: none">• Highspot Overview• How to Use Outlook and MS Teams• Overview of MyLearnings• Systems Check-ins• Review of Benefits by HR• WebEx Basics• MyMetLife Tools Overview• Avaya Setup• Submitting Expenses• Pay Performance/AVIP	<ul style="list-style-type: none">• Coffee Chats w/ SLT members• Networking circles and best practices• Next Horizons Overview & Our Purpose• Engaging with the MetLife Foundation• About the Inclusion Networks at MetLife

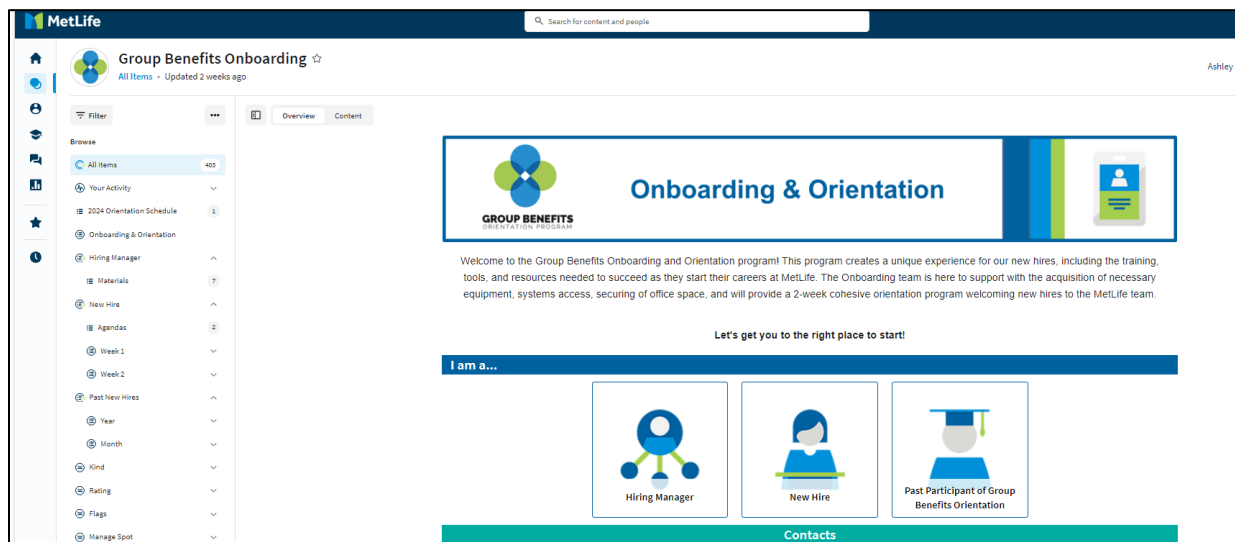
The orientation program had curriculum built with a focus on three segments, including building new hires' understanding of 1) the business, 2) the tools and resources available to them, and 3) purpose and networking. The business element of the curriculum was developed to allow the new hires to grow their knowledge of group benefits and the products and solutions offered, as well as the expectations of the business to help them meet their goals in their role. The tools and resources component of the curriculum educates new hires on the tools and resources available to them in their role, and how to use them, including small break-out session groups hosted to ensure all new hires can test that they have access needed to the systems that they will use in their role. The last piece of the curriculum, which includes a focus on purpose and networking, offers the employees the opportunity to understand the company's purpose, mission statement, strategy, and how they can align their purpose to be a part of initiatives with the company's foundation program and inclusion groups. Additionally, the orientation experience is also intentional in ensuring that new hires are networking with senior leaders in the business via coffee chats.

The orientation program was designed to support the work schedule of all Group Benefits, external new hires, and to ensure it offers a consistent onboarding experience for all new hires in Group Benefits. New hires participate in virtual training sessions, with block-scheduled for consistency. Time is built into the orientation program schedule that allows new hires to take the time to network, have a lunch break and manage to mental-health and well-being breaks. All training sessions are facilitated by a series of different subject matter experts from within the business, and the Group Benefits Orientation & Onboarding Program



Manager and Director to give new hires a series of different perspectives as they engage in the learning experience for the orientation program.

In addition to the orientation live, virtual trainings, which allow employees across the U.S. to join, a Group Benefits Onboarding & Orientation program website has also been made available for the new hires (and hiring managers), to support an easy reference point for the content and curriculum. All materials are hosted on the website in a manner that allows new hires', hiring managers and past new hires to access the information in a user-friendly layout. The program is intuitively organized week by week, so the trainees have access in real-time to the agendas and content. Below is the homepage that new hires, hiring managers and past new hires can view to access the orientation curriculum.



In preparation for each orientation program, the Onboarding Manager and Director, hiring managers, and subject matter experts review the curriculum to ensure the accuracy of information and to integrate learnings/lessons into the next orientation program. Finally, all who support the new hires attend training on how best to welcome and engage with new hires.

Engagement

Challenge #1—Ensuring all new hires have the required technology that they need on their start date

The Group Benefits Orientation & Onboarding team had to define new ways of ordering the technology that was needed for their new hires, so that all equipment arrived by their new hires' start date (while preventing managers from placing double orders). Prior to the Group Benefits Orientation & Onboarding program being launched approximately 42% of new hires required technology did not arrive in time of their start date. Therefore, the Group Benefits Orientation &



Onboarding team set a goal to ensure that 100% of new hires have the required technology on their start date and created a process to engage all necessary parties to achieve this goal.

The Group Benefits Orientation & Onboarding team collaborated with an internal team at the company that manages to the ordering of equipment for new hires. It was found that the internal technology team ordered computers on an ad-hoc basis for new hires and did not have a bulk inventory available that could be ordered from. This resulted in computers not always being available for order. Additionally, there was the hardship of a separate, automated communications campaign that the human resources team manages to that prompts hiring managers to order the required technology for their new hires, and these communications cannot be stopped as part of the automation process for new hires across the enterprise. To work around these obstacles, the team collaborated with the technology team to have a bulk order of all required technology ordered and readily available.

Additionally, the Group Benefits Orientation & Onboarding team developed a proactive communications strategy to avoid the duplication of technology orders. In a phased roll-out approach, the Group Benefits Orientation & Onboarding team broke the organization out into segments and went group by group in their communication efforts to ensure that all people managers within the Group Benefits organization were aware of the program. Now, the Orientation & Onboarding team regularly communicates with the Group Benefits people managers and hosts a monthly informational session for managers who have new hires joining in the near future. During these sessions, the Group Benefits Orientation & Onboarding team delves into the onboarding tasks that have been handled and review the high-level curriculum that their incoming new hires will go through during their two weeks of orientation with the Group Benefits Orientation & Onboarding team.

Challenge #2—Getting new hires systems required access to perform their role within 2 weeks of hire

It was discovered that approximately 70% of new hires withing Group Benefits did not have access to the systems that they needed within 4 weeks of hires. This was largely due to the cumbersome processes of trying to obtain systems access for a new hire, and hiring managers did not have time (or information) to manage to it. The Group Benefits Orientation & Onboarding team established a streamlined process that executes on getting all new hires systems access within 2 weeks of hire. This process was completed by building out systems access guidebooks for each specific role. This challenge included finding the right format in which to lay out the complex systems access requests, defining the right contacts to verify the information, and identifying an efficient way to perform the requests themselves. Over time, the Group Benefits Orientation &



Onboarding team built and evolved a project plan to ensure a smooth process every time a new hire came through the program. First, the Onboarding team laid out key contacts across the organization with whom they could connect to better understand the systems and platforms needed for roles across Group Benefits. Second, the Onboarding team met individually with those identified contacts to explain the program, process, and built out role-specific systems access guides. The Group Benefits Orientation & Onboarding team then works with an offshore team to manage to the process of submitting the systems access requests for all the new hires each month using the role-specific systems access guides that have been built. This newly defined process has resulted in 98% of the new hires having required systems access by day 10 in their role in 2023; and 2024 is tracking to have a 100% success rate of completion, thus far.

Challenge #3 –Creating a consistent onboarding and orientation experience for varying roles across Group Benefits

Group Benefits did not offer any orientation and onboarding experience for external new hires. This was a large contributing factor as to why 12.1% of new hires were leaving 90 days after their start date. Many new hires shared in the 60-day new hire survey that they did not feel welcome and wanted the opportunity to learn more about the company before they dove into their role. Therefore, the Group Benefits Orientation & Onboarding team took the time to assess the variation of roles within the business, and the team sat down with the key stakeholder and recent new hires to understand what they thought would be an effective way to create an impactful orientation and onboarding experience. This resulted in the Group Benefits Orientation & Onboarding team offering a two-week, virtual orientation program that any external, new hires could be enrolled in by their hiring manager. The tone of the program is intended to make all new hires feel welcome and to ensure that they understand the company purpose, and all the tools and resource available to them, no matter what level in which they are hired. Over 279 external, new hires have completed the program and 100% of them shared that they felt welcome and oriented to the company after participating in the orientation program. One recent participant in the program shared “It doesn’t matter the level in which you are hired into, whether it’s an SVP or consultant, I have never been through such an in-depth new employee orientation that sets you up for success like MetLife. This orientation and onboarding program is something every new hire should go through. Every session was full of useful information necessary for you to have a complete picture of the organization's vision, practices, and people.”



Measurable Benefits

The Group Benefits Onboarding Program launched in January of 2023 and has since had 279 external new hires participate resulting in significant improvements in the new hire experience. These improvements included a 5.4% annualized volume turnover, which is a record 3 year low, and massive accomplishment for the organization. Not only was the organization's turnover rate significantly lower than years' past, but 100% of eligible external hires who were offered the orientation program experience within 4 weeks of hire, had the systems access they needed to perform in their jobs following orientation completion, and 100% of those new hires had their laptops on (or before) their start date.

The Group Benefits Orientation & Onboarding team's efforts did not just ensure equipment would arrive to the new hires in a timely manner, it also resulted in significant savings for the business. By bundling equipment into singular deliveries and knowing that the demand for such bundles would decrease the unit price, the Group Benefits Orientation & Onboarding team saw \$30,000 in cost-savings through the bundling of accessories.

By the Group Benefits Orientation & Onboarding team taking systems access, equipment orders, and the orientation of new hires off the plates of hiring managers, the team has saved Group Benefits people managers the upwards of 32 hours+ per new employee.

The Group Benefits Orientation & Onboarding team has exceeded every goal set, and more. 100% of the talent that has participated in the program has shared that they now feel welcome and that they are set up for success as they start their role at the company.

Overall

Lesson #1: Throughout the first year of the Group Benefits Onboarding Program's existence, there were many lessons that were pulled away, in large part, from new hire feedback at the conclusion of the program, which only aided in the betterment of the program overall. One lesson learned was to keep systems access checkpoint calls to five or less people in each group. It was discovered through feedback and experience that too many people in a technology-related meeting can create frustration and confusion for the new hires. Immediately, the Group Benefits Orientation & Onboarding team made the adjustment that changed the feedback from new hires entirely. What was once rated a frustrating meeting quickly became one that many new hires noted as the most helpful session in the Onboarding program.

Lesson #2: The Group Benefits Orientation & Onboarding team learned to share the program start dates with the organization as early as possible for a multitude



of reasons. The first reason is so that hiring managers and recruiters could align new hire start dates with that of the Orientation & Onboarding program to create the most cohesive new hire experience possible. The second reason was so that the Group Benefits Orientation & Onboarding team could coordinate with other training programs within the Group Benefits Organization to avoid program overlap, and therefore potential new hire confusion.

Lesson #3: The Group Benefits Orientation & Onboarding team quickly discovered that there was no process in place to communicate the tracking information for equipment packages to the hiring managers. The Group Benefits Orientation & Onboarding team worked with their internal procurement partners to set up a regularly scheduled report that displayed order numbers, delivery locations, and tracking numbers so that all parties could stay up to date on where all equipment was and ensure timely deliveries. The Group Benefits Orientation & Onboarding team also discovered that for items to arrive perfectly on time, they must schedule delivery of equipment 2-3 business days prior to the new hires' start dates. This early delivery gives both managers and new hires peace of mind.

What's next: In the future, the Group Benefits Orientation & Onboarding team looks to continue expanding the program by having an in-person aspect during the orientation program, which will allow for a more personalized approach and experience for all new hires.

The Group Benefits Orientation & Onboarding team will also look to continue the expansion of the team to allow for a dedicated resource who can commit to more post-program engagement, including bringing previous new hires back together as a checkpoint to ensure that they are getting what they need from their teams and managers. Using the information captured in these sessions, the Group Benefits Orientation & Onboarding team would be able to better communicate the needs of new hires to managers at every stage of their onboarding during the first year of employment with the organization.



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