

Digital Learning Journey

New Hire Onboarding Transformation

Project Summary

Schwab's new hire onboarding process relied on a 400+ page physical binder, resulting in inconsistent outcomes and high attrition. The mission was to reimagine onboarding as a digital, data-driven learning journey that improved performance, retention, and learner confidence.

Design Process

Structured Analysis

I applied ADDIE for the overall project structure, SAM for rapid iteration on platforms and assets, the Dick & Carey model when clarifying outcomes and scope, Bloom's Taxonomy for learning objectives, and the Kirkpatrick model for evaluation.

Individual course and lesson structure

1. Welcome
2. Navigation Explanation as needed
3. WIIFM / Establish Value
4. State Objectives!
5. Tell the learner what they need to know and why they need to know it
6. Show the learner what they need to know and why they need to know it (e.g. simulation, role play, how to video, shadowing)
7. Have the learner do what they have seen and share insights (quiz, assessment, learner led demonstration)
8. Evaluate learner (call calibration, quiz results, assessment results, etc)
9. Offer feedback (quiz review, assessment review, mentoring)
10. Give a takeaway for continuing development (resources, other trainings)
11. If applicable, allow the learner to apply knowledge in new and different way then shown
12. Repeat this process for every desired skill and behavior

Development Tools

Built scenario-based modules in Articulate 360 and deployed adaptive learning paths through Cornerstone LMS, supported by Adobe Creative Cloud, Microsoft 360, and TechSmith tools.

Collaboration & Iteration

Partnered with SMEs and product managers to co-author realistic scenarios, piloted with new-hire cohorts and sample groups, and refined content using learner analytics and KPI trends.

Course Structure Key Enhancements

Interactive Simulations

Scenario-based practice tied to real workflows, reinforcing decision-making and problem-solving.

Real-Time Feedback

Learner dashboards and facilitator views surfaced readiness, gaps, and coaching opportunities.

Adaptive Pathways

Role-based journeys and remediation paths accelerated time-to-proficiency for new hires.

Issues Resolution & Strategy Reinforcement

Stakeholder meetings, clear communication, project management tracking, system reviews, data collection, knowledge checks, scope and business objective alignment reviews, iterative agile development.

Impact & Results

 33% Attrition Decreased

 25% Retention Increased

 Learner Confidence Survey and KPI improvement

 Handle Time Reduced

 Zero Print Costs

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"This project was significant to me because it was my first of many projects with Schwab and it allowed me to have a measurable impact on many individuals success. I believe instructional design is equal parts analysis, empathy, and experimentation. Transforming Schwab's onboarding allowed me to show how thoughtful design elevates both performance and culture."

Outcome: A scalable, digital onboarding experience that reduced attrition, improved KPIs, and gave leaders clear visibility into learner performance.