Onboarding in the Online Environment

Learner Persona Interviews & Surveys Report

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Learnovate Report

This report was created by Learnovate at Trinity College Dublin for the OBOE Core Research Project: Onboarding in the Online Environment.

1. Executive Summary

This report provides a summary and overview of the experiences and opinions expressed to Learnovate during the Onboarding in the Online Environment (OBOE) field research.

The team collected first-hand data from 10 new hires who started a new job after January 2020, and were onboarded remotely

In this report you will find details on the research approach we undertook and our findings, insights, and recommendations from the date we collected from the learner persona of "Pat", a newly onboarded employee.

Key Findings

We structured our findings below around the categories of questions we asked our research participants: remote working, onboarding, integration in the new role, remote interactions and additional insights.

Remote working

➢ People miss having face-to-face social interactions and while they appreciate frequent online interactions, new hires still miss the in-person human interaction.

➢ It is hard to understand the context of your role when there is no opportunity to pick up on conversations, understand historical context or understand the dynamic between people, teams, and departments.

➢ Asking questions gets harder after a while because interrupting co-workers remotely (rather than turning to the person next to you) feels uncomfortable to new employees, especially if the nature of the question is, in the new employee's eyes, too simple or something they should already know.

➢ Informal communication channels like Slack help with cultural integration although such tools could become burdensome if the information shared on them can not be managed properly.

➢ A collaborative approach to work is conducive to the new hire coming to grips with the details of their role, introducing new hires to cross functional teams and colleagues gives the new hire a sense of how they fit into the overall organisation.

Onboarding

➢ Starting a new job is a significant event in someone's life and new hires are looking for a welcome that recognizes and honours the importance for the new hire. They expect a proactive approach from management.

➢ New hires need to be set-up for success early on. Some critical to-dos' like paperwork and IT set-up could be completed prior to the first day. This is something that is not always considered.

➢ New hires can feel lonely and insecure because they are onboarded remotely. Being in a home office without knowing exactly what to do can be a breeding ground for imposter syndrome. They might find it harder to prove themselves in a remote environment because they can't build an organic sense of rapport or team spirit with colleagues and managers.

➢ Getting the right information is one thing but making sense of the context of the role and working environment is more important and harder to achieve. Context is everything.

Integration into the new role

➢ New hires have more time to absorb and reflect on asynchronous information; this can be helpful to ramp-up quicker in their new role. However, finding the relevant and up-to-date information can be a challenge, especially if there is a lot of it. We expect new

hires to start to have higher expectations of the quality of these resources, especially when it comes to discoverability, interaction, and customization.

➢ New hires and the organisation are keen for the new employee to add value as soon as possible. A detailed onboarding plan and scaffolded approach to learning the skills of the job or setting an onboarding project can help (but is not always supported past the first couple of weeks well or implemented at all). It is important not to ramp too steep too fast!

➢ In a remote onboarding setting, more experienced new hires find it easier to navigate their introduction and integration to the role and organisation than early career employees or those who return to work after an absence. They have the confidence in their skills and abilities as well as an understanding of the operations of an organisation to bridge the gaps in the onboarding process.

Remote interactions and experiences

➢ Early, frequent, and ongoing communication with the new hire is crucial. The new hire needs check-ins to ask questions, sense-check assumptions and receive and give feedback on their onboarding experience and the role they are in.

➢ New hires appreciate having a buddy or a mentor to guide them through their first months. Often these relationships develop and grow into productive working relations. Buddies need to be available and familiar with the responsibilities of their role.

➢ Informal communication channels can help the new hire to make connections with co-workers and immerse themselves in the informal culture of the organisation. It is also an easier way to ask questions rather than scheduled formal meetings.

➢ Building a network with the team and across the organisation is considered a very important component of integration into a company. When onboarded remotely, it is difficult to build continued relationships from initial formally scheduled meetings and conversations. It is also harder to gain insight into who the key stakeholders are that you need to include in your network to be successful in your role.

Additional insights

➢ While new hires do not always know what to expect from their onboarding experience or onboarding program, they want the experience to feel like it is customized for them. It is therefore important to learn about your new employees, listen to their feedback on the onboarding process and make continuous improvements to it.

➢ Technology apprehension and fatigue, and in some cases avoidance, is a real concern with so many new tools to learn and to onboard onto. This should be considered especially among new hires who were not used to this level of technology in a previous role.

2. Background

In April 2021 a discovery workshop was held which followed the Jobs-to-be-Done (JTBD) approach. The purpose of the workshop was to develop thinking and validation around the concept of what we termed "*A solution to online onboarding that provides an effective and engaging experience ensuring new employees are providing value to the organisation as quickly and seamlessly as possible.*". Our initial assumptions from research preceding the workshop were that:

● Most of the Onboarding processes identified consist of a generalised approach to new employees; the experience being the same for each new employee regardless of past experience, job role, etc.

● As with a 'one size fits all' approach to learning experiences, employees can disengage from the Onboarding experience if they are receiving a lot of information that is not relevant to them or their role and does not consider their previous work experience.

● From the literature it is identified that employees often rely on trusted work colleagues more than managers and that these relationships are viewed as very important by the new recruit.

● Poor onboarding practices lead to attrition and higher staff turnover rates.

The JTBD approach essentially tries to define what problems a user faces in their current environment with respect to functional, emotional, and social needs, how these problems relate to outcomes and barriers, and then validate whether or not these problems exist by talking to the real-life users. The JTBD workshop canvas is shown in Figure 1.
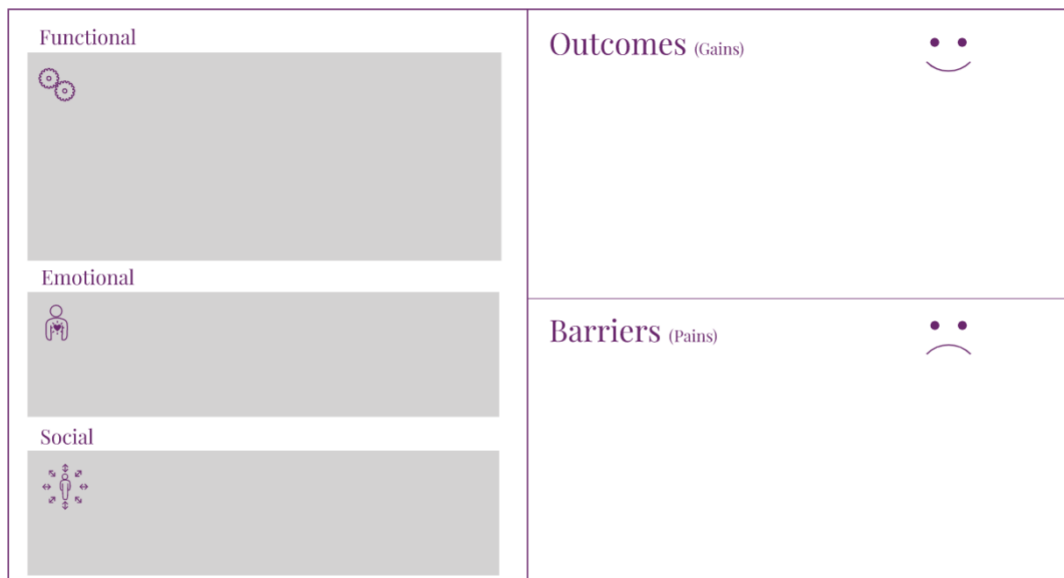

Figure 1. Jobs-to-be-Done Canvas

The first task in the JTBD workshop was to develop a proto-persona. Proto-personas are a variant of the typical persona, with the important difference that they are not initially the result of user research. Instead, they originate from secondary research which tries to encapsulate our beliefs (based on domain expertise and gut feeling) about who might use a product or service and what is motivating them to do so? Proto-personas give an organisation a starting point from which to begin evaluating their products and to create some early design hypotheses. In developing a proto-persona we focus on the customer segment most likely to have the assumed need. The proto-persona identified during the JTBD workshop was **Pat**, a new employee at a medium sized company about to undergo a remote onboarding process (**See Section 3**).

After identifying the proto-persona, the next step was to refine our thinking on what Pat's problems are and rank them according to how painful they are. In conjunction with industry

partners, we brainstormed what we thought the jobs are that Pat is trying to get done, and the barriers facing him (pains), as well as the outcomes of him getting her jobs done (gains). Importantly, in looking at these jobs we are focussed on jobs we believe "*A solution to online onboarding that provides an effective and engaging experience ensuring new employees are providing value to the organisation as quickly and seamlessly as possible*" can solve (Figure 2). We then rank each of the JTBD, pains and gains in order to focus our thinking around the customer (Figure 3).
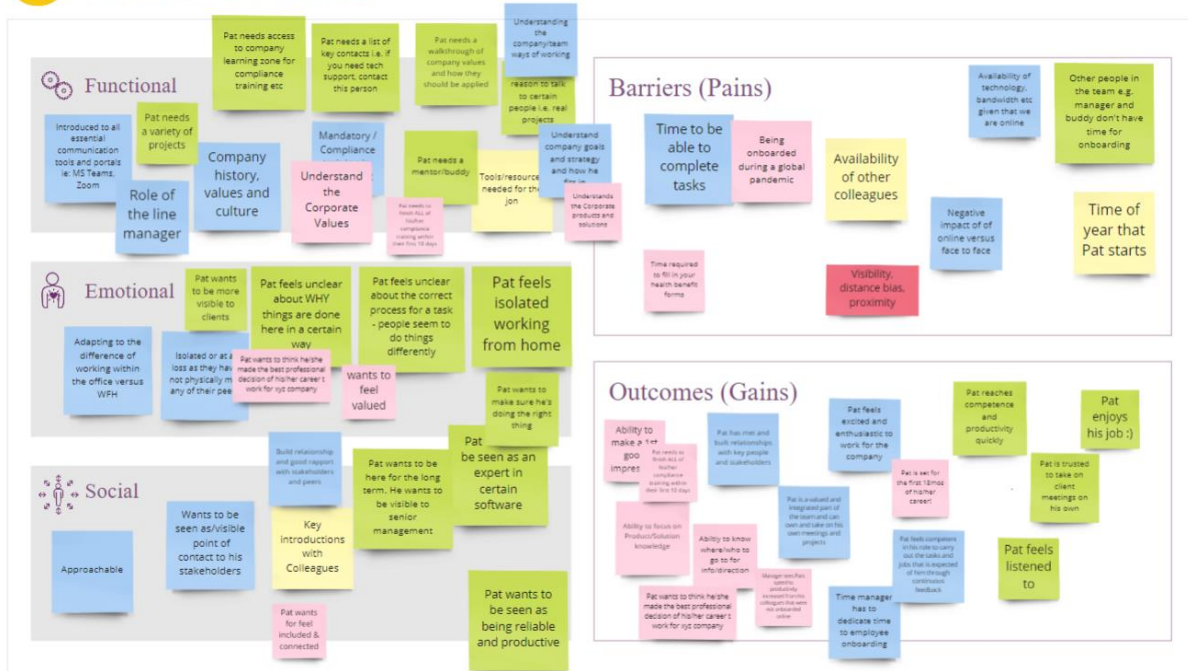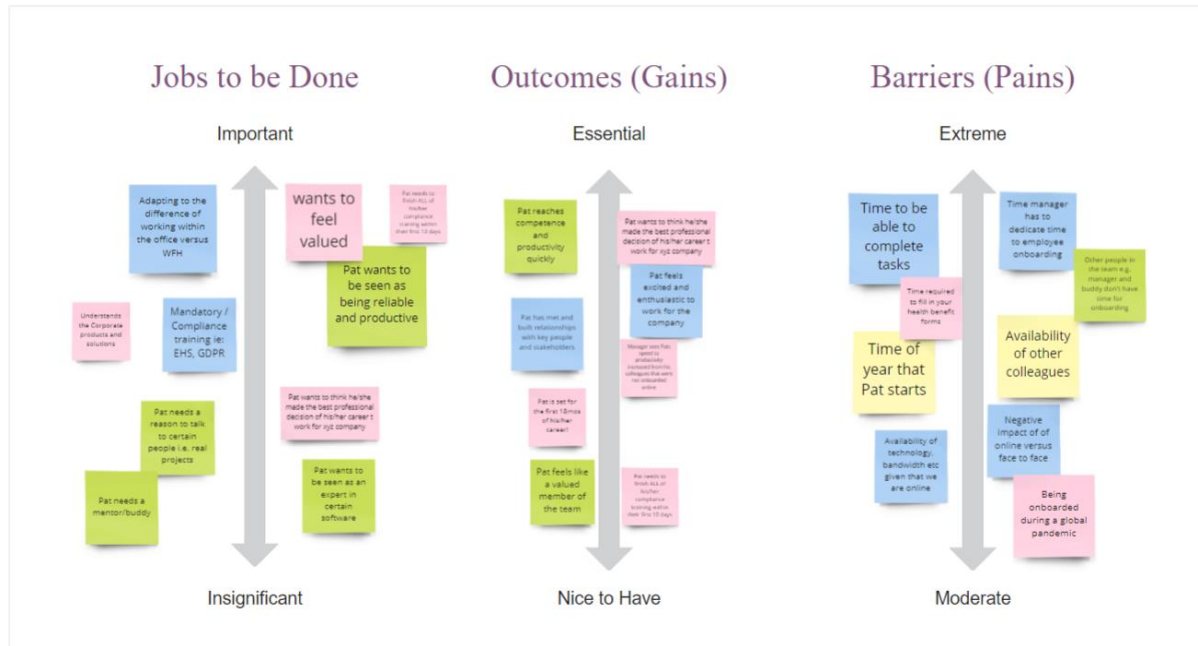

Figure 2. Learner Persona (Pat) from JTBD Canvas

Figure 3. Jobs to be done for Pat, Ranked

Those assumptions that emerged from this workshop are grouped into Pat's needs and are captured in the next section.

3. The Learner Persona (Pat)

3.1 Assumptions about Pat

The assumptions about Pat, and the characteristics that we project onto him, allow us to target specific participants for validation interviews.

Table 1: Our assumptions about Pat

Pat, Age 25-35, Learning Designer with 6+ years in the industry	
Tech	-Uses social media & is familiar with basic tech such as MS Office/Google -Has a LinkedIn profile
Personality	-Enthusiastic & willing to learn -Adaptable, happy to work in a fast-paced environment -Team player & good in 1:1 situations but perhaps not in larger group situations -Knows the job but new to the job here -May be reluctant to change personally
How Alex Buys	-Interested in the company & its values -Internal promotion -Searching for the dream role & enjoys a challenge -Seeking new opportunities
Influencers	-Colleagues/friends in other organisations -Processes in previous companies e.g., interviewing & onboarding

3.2 Pat's Needs

From the workshop we can make some assumptions about Pat's needs...

- *Pat needs* to work remotely & adapt to this 'new' working environment and feel valued in his new role

- *Pat needs* to complete all his required training as quickly as possible after starting his new role and be seen as reliable & productive

- *Pat needs* to feel that he has made the right decision in starting work with his new company while understanding all the related corporate products and solutions

- *Pat needs* to have a mentor or buddy to support him in his new position and needs a reason to interact with new colleagues and managers

- *Pat needs* to be seen as an expert in his role as quickly as possible

3.3 Problem Interview Script Pat Persona

In order to validate these assumptions about Pat, an interview script was developed and reviewed by the Research Working Group. The script was further developed into a survey and shared via network contacts and relevant social media channels. The script was split into several areas of focus based on our assumptions about Pat's needs. The script is shown in Table 2. Our interview approach is based on the Mom Test, where we seek to validate our assumptions and discover if a problem really exists, we do not focus on solutions at this point.

Table 2: Interview script for Pat

Area of Focus	Questions
Working remotely	➢ Can you tell us how you feel like part of your organisation while working remotely? ➢ Did your organisation help with this? If yes, how? ➢ Do you feel valued in your role? ➢ Do you feel confident in performing your job while working remotely? ➢ What would help in this regard?
Onboarding	➢ Can you tell us about your onboarding experience? ➢ How quickly did you complete all your required training? ➢ Do you feel like you added value to the organisation quickly? ➢ How did your onboarding experience help with this? ➢ Do you think that working remotely impacted on your onboarding experience? ➢ How do you think this could have been improved? ➢ Do you think that others feel that you are contributing to the organisation and working effectively? ➢ Is there anything that could be improved in this regard?
New role	➢ Can you tell us a little about your decision to move to your new role? ➢ Can you tell us a little about your decision to move to your new role? ➢ Do you feel confident that you made the right decision? ➢ Do you feel that you know everything you need to know about your new role? ➢ Is there anything that could have helped to make this process easier or better? ➢ Would you consider moving to a new organisation in the next year or two? ➢ Do you feel that you are viewed as an expert in your new role? ➢ If not, do you think that you will be in time? ➢ Do you still feel like the 'new person'? o Why/why not? ➢ Do you feel that you are a part of your new organisation? ➢ What has helped you to integrate into your role and organisation?
Remote interactions	➢ Do you have an assigned mentor or buddy at work to help ease you into your new role? ➢ Can you tell us about your early interactions with colleagues or managers? ➢ Were meetings set up for you?

	➢ Were there topics arranged to discuss with your new colleagues and/or managers? ➢ Can you tell us a little bit about the support you have received? ➢ What could be improved? ➢ What type of support has worked best for you in your new role? ➢ Is there anything you would like to add in relation to any of the above?

In the interests of clarity and flow, the remainder of this report has been structured according to these areas of focus and we have included in each section any relevant insights, both from the semi-structured interviews conducted by Learnovate and from the relevant survey.

4. Interview & Survey Insights

In speaking with 6 new hires and receiving 4 further responses to our survey, a number of insights were gained which are summarized following the structure of the focus areas outlined in the interview script (Table 2).

4.1 Background Information

All research participants started a new role between March 2020 and June 2021. Most started in a full-time permanent position, but a few participants started in temporary or contracting positions. Based on their responses, the type of contract of the new hire impacts on how organisations onboard new employees. Typically, more emphasis is put on integrating the new hire in the organisation's culture and social structures when the employee is hired on a permanent basis. Those participants who started in temporary roles or who joined the organisation on a contract basis experienced a reduced onboarding program focused on getting them working their full role as soon as possible.

The reasons for the research participants to start a new job varied from being made redundant, challenges with immigration as a result of the pandemic, returning to work after a career pause or simply looking for a new challenge.

4.2 Working remotely

Participants stated varying experiences with working remotely. Some had never worked remotely before; others were already working from home full-time before taking on their new role. Everyone we spoke with worked remotely when they were first onboarded and would have experienced their onboarding process mostly in a remote setting. There were two exceptions where participants were able to visit the office for parts of their onboarding experience. As time progresses, the majority of participants will work in a hybrid working model; however, some mentioned they will be fully onsite or fully remote going forward. It is evident that people will continue to work in a variety of remote, onsite or hybrid settings, however, it is not clear to most of our research subjects what this will look like.

Maybe not unexpectedly, all the research participants stated that onboarding remotely made it more difficult to make social and informal connections with new team members. Watercooler conversations,

asking a question of the person next to you, picking up information through overhearing, developing conversations and getting to know people is harder. Acquiring tacit and tribal information from these means is vital to understanding the culture, context and relationships in an organisation. It can be more difficult to get valuable tribal information, things that can be important to be efficient in one's role. As a result, most of the people we talked to indicated that they felt it took them longer to learn the ins and outs of their roles. As one respondent pointed out:

> *"It is great to have the ability to engage with asynchronous resources, but I miss the face-to-face interaction with people, particularly when onboarding. It is hard to connect the dots between people, roles and responsibilities."*

Most respondents said that there was no specific effort made by the organisation to facilitate the informal interactions outside what might have been planned in the early days of onboarding.

People have frequent engagements either with their manager or team during the first couple of weeks on the job. Some participants mentioned they feel more uncomfortable asking people for things as they feel they are interrupting and that It feels more intrusive and difficult to ask co-workers for support in a remote setting. This feeling of unease increases as time passes when new hires feel it is not acceptable anymore to frequently interrupt co-workers or managers with small ongoing queries and questions. An assumption of knowledge emerges creating a barrier between learners and their supposed mentors. Instead, the new hires in our research would save their questions for formal engagements like 1:1s, meetings or team meetings. It is interesting that this feeling persists as people also indicated that their co-workers in general are very responsive to their questions and would, as one participant put it, 'go out of their way to make sure I was ok and had everything I needed', thereby indicating that their fear of asking questions was somewhat irrational

Some people mentioned that interactive communication technology like Slack or another space to have informal conversations does a good job replacing the need for face-to-face communication.

A final observation on working remotely is that when teams and organisations have a collaborative approach to work and there is frequent interaction and communication between co-workers, new employees find it easier to connect and get to grips with the details of their role when working remotely. Participants who had come into the new organisation where the job role was closely aligned with a recent role, felt more confident in their remote onboarding, while participants who were

learning a new role or who had come from a break in employment, were less confident in their remote onboarding. In terms of the latter case, participants felt a greater need to get to know their new colleagues personally in order to ease their transition into the new role.

5. Onboarding

5.1 The general onboarding experience

The participants had a wide range of experiences during their onboarding. In the best-case scenario, a full schedule of formal and informal activities, training, and interactions were scheduled over a period of month or longer. On the other hand, there were people, in particular those who started in new roles as contractors or on short-term contracts, who received little to no onboarding program and were just expected to hit the ground running after the first week or so.

One person indicated that their onboarding experience was challenging because he joined at a time when the organisation was in the midst of getting to grips with the changes thrust upon it because of the sudden move to remote work which was a huge change for the organisation. Finding information and people to talk to was really difficult for this participant. In this and other cases, participants relied heavily on their previous experience to forge a way through the confusion and find the right resources or people to help them get started. This was a difficult and confusing experience and made some people think about reconsidering their choice to accept the role.

5.2 What the onboarding program looked like

In general, a formal onboarding program was in place for the majority of the research participants, but for some, it was a minimal experience with just a conversation with their manager or HR person.

5.3 Who is responsible for onboarding?

Where there was a more formal onboarding program, the duration of the program varied from a couple of days to about 1 month. In most cases, the onboarding program was run by the HR department with support from the hiring manager and team. In some cases, usually in larger organisations, an L&D organisation may be responsible for the onboarding program. In most organisations, onboarding is a shared responsibility between HR/L&D, Leadership, Line Management and Team members.

5.4 IT Set-up and Physical working space

The technical set-up was identified by some people as feeling a little alien because of the remote nature. People mentioned it was a surreal experience to just receive your laptop in the post for a DIY setup rather than going through a support process with an IT specialist. A few people commented that while it was easy to get started, it would be beneficial for the organisation to consider people's physical workspaces while they are (largely) working from home because it is not a given that everyone has a suitable space or the equipment to work from home.

5.5 The welcome

Whatever the onboarding program looks like, the need for early, frequent and ongoing social interaction has become more apparent while people work in a remote or hybrid environment because it can be lost more easily. One person we spoke with shared that on her first day, her first meeting with her manager was not scheduled until 2:00pm that day and it felt surreal to start her new job without an official early start to her day. In a remote working environment, it is important to emphasize the new hire's welcome, and consider ways to make it a more memorable experience as people don't have that same experience of walking in the door of a new building anymore. One participant welcomed the special effort the company made to set up relevant one-on-ones and how lots of context was provided about who they were meeting and why.

> "*My manager did a great job of lining me up with some great documents that i needed to read through, that she thought were relevant to my job, and also set up 7 or 8 one-ones, and some suggested topics like 'here's something you might be interested in talking to this person about', and not have it just be a cold-call (over Zoom). For example, you're both from San Francisco or your kids of the same age etc. I really think this was invaluable information*"

5.6 Onboarding program pattern

All participants shared a similar pattern of their onboarding experience. Usually, the first days or week is front-loaded with activity and information-sharing. Generally, new hires complete critical to-dos like IT set-up, selecting benefits, and mandatory (compliance) training in the first couple of days. This is

usually followed by sharing of information and processes. One participant spoke of having to read a lot in these first few days.

> *"There were a lot of documents and a lot of emails to read through. In fact, I still get a lot of emails from them that are tedious to read through. It felt very process driven and formal. There was not enough human interaction in the induction. You are kind of expected to go off and read it yourself."*

Once those actions are completed, there are usually some meetings scheduled with their manager, team members and other stakeholders they will interact with in their role.

One participant spoke of being placed in a training group with fellow new employees. This group was expected to remain in regular contact for the duration of the initial training period of 6 months or so. The group was made up of people from different roles and disciplines in order to give the group an idea of what other people did in the company and where they fitted within the overall organisation. The participant did speak of the initial downfall with this approach, as she felt like she didn't know as much as the other group members and felt she was behind, however this anxiety was overcome.

> *"They formed learning groups where you learned about what were considered basic skillsets. For example, one was GitHub training. It felt like this was aimed at people who should already know a lot about it, so I felt a kind of imposter syndrome. Did they hire me not knowing that I don't know this and when they found out I'm going to get fired? But it was intended to be a way to learn about the roles of other people, it was intended to be low risk, low impact, like practice for doing tech things. Luckily the learning groups were made up of people from different roles, so I think other people were at the same level of learning as I was!"*

The same participant went on to describe a sudden ramp in complexity or difficulty of training or onboarding assignments. It is clear that this is something they felt should be avoided in remote environments as it can be hard to know who to ask questions to.

> *"One thing I found was that there was a sudden ramp in difficulty, like you know something like tech compliance training, for example we would get this tech training quiz and it would be really easy and you'd review what you learned but then the next quiz would just be extraordinarily difficult. Like you're walking and then suddenly you're*

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climbing a mountain or a cliff. And I know some of the more tech-oriented people in our group like the engineers would have found that to be a cake walk. I found that frightening and even worse I didn't even know what questions to ask!"

5.7 Buddies/Mentors

A buddy may be assigned to the new hire in the majority, but not all cases. The level of formality of a buddy or mentor program varies to some extent. When a buddy or mentor is assigned, this is experienced very positively by the new hires as it provides them with a friendly face, a source of feedback and information as well as an opportunity to better understand the context of the role. One person indicated that because things were so chaotic when he started, having a buddy was probably the only reason why he stayed in the job. The relationship with buddies/mentors was frequently mentioned as the best aspect of the onboarding process. The buddy/mentor relationship is especially important during the first few weeks, when new hires rely on the relationship to ask questions, understand the basic context of their role, get a glimpse of the culture of the organisation, sense-check their understanding as well as share early positive and constructive feedback. It is important for the buddy to also be supported, as they need to understand their role and understand the needs of the new employee as well as have the time to support them.

5.8 Onboarding assignments

We did not hear many research participants share that they were given a specific onboarding assignment. There was one person who discussed, and spoke highly of, a scaffolded approach of getting introduced to the functional side of their role. They were given small pieces of work to complete that would increase in complexity and autonomy over time and were discussed in regular 1:1s. This was experienced as highly supportive and effective by the new hire.

5.9 Feeling part of the organisation

The message came through loud and clear from our research participants: human connection is more important than ever to ensure a positive and engaging onboarding experience. There is a level of understanding with new hires that this is harder to achieve because of the sudden shift to remote work. However, that does not take away the need for human connection and leveraging those human connections to develop an understanding of the context of their role and building a network in the

new organisation, which is a crucial component of feeling confident and being effective and efficient in the new organisation.

One of the takeaways from our field research in this respect is that it might be easier for experienced new hires to find ways themselves to find those connections and ask for what it is that they need. For entry-level or more junior new hires this could be more challenging as they don't necessarily know what to look for or expect in the first place.

However, in a remote or hybrid environment, investing in creating conditions for new hires to connect with the people in the organisation is absolutely essential for a positive onboarding experience. The most positive comments in relation to the onboarding experience we heard came from new hires who felt supported by their new organisation. That support is mainly provided through human-to-human interaction that is planned, frequent and purposeful. Providing new employees with a manual, training videos or a knowledge base of helpful resources is not enough to ensure the best onboarding experience possible.

One participant spoke about how the organisation went through great lengths to provide them with context as to why the company did things certain ways, and what led to the current best practices.

> "*We have access to a lot of online material and resources. The company documents a lot of its experiences, decisions and values and makes it available for you to read about. We have a wiki-style archive that includes documentation of past summits and discussions that led up to a change in policy or a change in mission and that really lets you feel like you're in the know about the company. There is also an internal podcast where they discuss events and changes or discuss why the company does something a certain way.*"

It was clear from the discussions that those organisations that invest time and resources in opportunities for the new hire to make connections, work collaboratively and experience the organisation culture have a bigger opportunity to effectively onboard its new employees.

5.10 Confidence to perform in the job

Overall, the new hires were moderately positive when we asked about their confidence to perform in the role they were hired for. One of the benefits stated was that because you are working from home, there is a bit more time to process and dive into available information.

On the flipside of that, most people stated that it can be harder to find the information and you depend on what you get from your onboarding program, your manager, and your co-workers. You can never be sure you have the right or all the information you need. One of the participants described the difficulty he experienced in getting the right information as follows:

> *"it can be difficult to find information. (At times it) feels like a 'ball of elastic bands that you just can't get to the middle of. A few times I nearly gave up but now I feel more confident about working remotely and I know who to talk to. I also know more now about what he can leave, what's not as urgent, where to find info, etc."*

This person was disheartened by how difficult it was to get the information initially, but, like others, leaned on basic processes that were in place to get to the right information. After a while most people expressed being more comfortable navigating the environment and as the comfort increased, so did their confidence to perform in the job.

Almost all respondents commented on the culture of support in their organisation and how it helped them when people were forthcoming with information and sharing context. Again, because of the remote element of their work environment, it was harder to build ongoing relationships, which is a common way to acclimatize to the culture and way of working in any organisation. When one participant was asked if she felt like an expert yet in her role she said definitely not! And then spoke of how important it was that they already knew somebody in the organisation, that they feel comfortable around and get insider knowledge from.

> *"I still definitely have to keep asking questions, but I'm lucky to have someone I know from a previous job who I can be vulnerable with and can rely upon. Finding out what's important to know and what's not important to know, I think that's one of the hardest parts about not knowing. And what is important to the company can change suddenly."*

One participant spoke of how the onboarding process was like a ramp to prepare them for their first 'big task'. It was interesting to note that when this first big task came, they would have prepared to be in the office in order to quickly ask questions and gain important tacit knowledge.

> *"It was a relatively steep ramp in terms of getting up to speed and I had to get up to speed quickly in time for key activities. Early into my role there was a big launch where I was expected to carry out a lot of tasks. There were a lot of questions flying around and*

there was a sense of urgency. I think this was the first activity where I felt it may have been more effective to be in the office to ask people quick questions and get a sense of what was going on but ultimately it turned out to be ok. I guess the intros and one-on-ones, and my one-on-one training during my first few weeks equipped me to deal with this event."

5.11 The importance of feedback

Many participants indicated that they felt a level of insecurity about their performance at the early stages of their time in the organisation. In some cases, working from home remotely (in particular when people live alone) was quoted to be a 'breeding ground for insecurity and imposter syndrome'. But in less extreme cases, people generally struggle a little to understand what is expected of them and how they are performing against these expectations. Not having face-to-face interactions, where new hires can do a quick 'fact-check' or get some clarification of something that is on their mind is a hindrance in this situation.

Receiving frequent formal and informal feedback is crucial for new hires to help them get to a level of confidence and acclimatisation to the culture.

6. Integration into the New Role

6.1 Expectations

We did not collect a large amount of data on the extent that people feel integrated or confident in their role. The people we spoke to were either coming to grips with the detailed roles & responsibilities of their role or felt confident from their previous experience and skill level to evaluate their performance in the role. Other people indicated that they felt they never knew everything there was to know about the role and were constantly evolving their knowledge and skills.

One of the participants offered an interesting perspective on how they were unclear about the expectations of their role and in particular the high level of autonomy that was expected of them. They compared themselves to other people in similar roles to gauge their performance.

On the other hand, we received data from another research subject who explained that her organisation took a very scaffolded and guided approach to upskilling in their role. Starting small and increasing tasks in complexity and importance as they became more comfortable with the processes that needed to be followed. One participant spoke of how there was a period where she was unsure of herself as part of the organization, and she felt like she was just trying to absorb as much as possible.

> *"I found it hard to get my roots initially. I was kind of like a jellyfish, floating and absorbing. However, my organisation really acknowledges that this is a company where you need to spend time gathering and understanding the context of your work before you can become effective."*

In general, people indicated that they had many questions about their role, its context, and expectations throughout their onboarding process. In most if not all cases, there were supports in place to guide them through this. This could be through 1:1 conversation with a manager, a social communication platform, collective sessions with experts, a buddy or a manual or resource website. The discoverability of relevant content was experienced as a challenge by some who said that it was hard to get the right and reliable information or that there was simply too much information available which made them feel overwhelmed.

We conclude that setting expectations and specific goals is extremely important as a basis for a good onboarding experience, however, in reality this may not always happen in a structured way and could be more ad-hoc or driven by the new hire's wish to learn more.

6.2 Culture

When we asked people about how well they had integrated into their new roles, people often referred to how well they had integrated in the culture of the organisation instead, which is an interesting insight. In general people feel relatively confident they are able to meet the performance expectations of their role, but it seems to be more important to measure their level of integration by referring to the relationships they built, how the are embedded in a collaborative way of working or are regarded to be performing well based on how they are treated and perceived by their teammates, for example being asked to contribute opinions or expertise they have and being sought out for information or input. We extract from that the longer term need for people to integrate into the culture of the organisation. When that part of onboarding is successful, people tend to be more confident about their ability to perform in the job. One participant spoke of how things like jargon and lingo can really play into the identity of a company, and that you can't really feel part of the culture until you come to terms with this.

> "*We have loads of examples of internal jargon and lingo and metaphors that the organisation utilises that can alienate you a bit at the start. You have to get used to this, and they have good guidance on their online documentation. Once you get used to this and start using them yourself you feel more part of the culture.*"

7. Remote interactions

All our research participants expressed missing the face-to-face social interaction during their onboarding experience. We believe this is because starting a new job is an important moment in someone's life and stepping over the threshold of a physical office and shaking the hands of your team members is hard to replace by online interactions.

When it comes to working remotely itself, opinions were a little more divided with some people indicating that they would be very comfortable or will be working fully remotely, whereas others expressed a stronger desire for hybrid or onsite work.

7.1 The basics

In the remote and online scenario, in some cases, even the most basic introductions to the team were overlooked. Some people did not meet anyone until late into their first day while others had to try hard to find someone available to answer their questions. However, most people had at least one conversation with their manager, team or co-workers during their first day. In many cases, these occasions would take the form of an official welcome, and in many cases, the meetings were a regular occurrence. The time with a manager and team members in particular would be used for sense-checking, asking questions, and learning more about the organisation, the team, and their role in it.

In addition to the personal introduction, it is increasingly important to make sure that the new hire is set up technically as well. This is a basic process but can be challenging to get right and provide the right support for. It is important to remember that new hires may not be as familiar with the technical setup and/or tools that the organisation uses and the etiquette around use of tools, email, or other systems. It is easy to make assumptions that people get to grips with these aspects of the job on the fly, but sometimes they need more and more structured support.

This is potentially something that can be done at the pre-onboarding stage.

One participant had an interesting take on the remote aspects of their onboarding and their work in general with regards to their engagement.

> "you certainly feel more disconnected from the organisation, but this is both a positive
> and a negative thing. The negative is obvious, that you were less engaged and

disconnected. The positive is that you don't become too emotionally attached to the work because you're not seeing the people around you who are getting 'worked up' over it. Maybe it is a good thing to not be so involved. You can step back and just concentrate on the work for what it is."

7.2 Interactions with Buddies and mentors

As mentioned before, many participants were assigned a buddy/mentor at some point in their onboarding, although the degree of interaction with the buddy/mentor varied between participants.

The best buddy experiences were those where the buddy's role was to familiarize the new hire with the specific elements of their role and where a scaffolded approach was taken to introduce the new hire to the tasks and responsibilities of the role. One participant spoke of the buddy as somebody who was like an 'assist-as-needed' supervisor, who was gradually phased out as they progressed in the role. This was an example of a very on-hands buddy:

> *"I was assigned a buddy who showed me the key tasks I needed to carry out, for example raising POs or generating weekly/monthly reports. This buddy would spend about 2-3hrs per day with me over zoom and shared her screen while showing me how to carry out the key tasks. Gradually I would do these tasks on my own and my buddy would watch me doing them or would review my work."*

We also heard some examples where new hires felt their buddy might have been too busy to support them and they were imposing on their time. This is related to the overall problem of being unable to generate spontaneous or natural interactions in a remote environment.

7.3 Informal communication channels

A significant number of new hires indicated that the use of informal communication channels like Slack etc. were really helpful to initiate more informal conversations with their co-workers. In cases where these tools were already used a little longer, they facilitated cultural onboarding of the new hires as well by including them in 'channel' conversations aligned with their role or interests, increasing the feeling of inclusion and belonging. One participant spoke at length about the use of Slack and emails, and how they are incredibly useful but can also be overwhelming and at times burdensome.

"so much interaction is through carefully crafted slack and email messages. I find it hard to keep track of things on Slack and I know there are bookmarks and similar ways to flag messages or threads, but I think there's a workflow problem there. Sometimes I come back from holidays and there's literally too much to take in. I feel like I'd need a course in Slack to use and appreciate it properly!"

With regards to socialisation, we got a mixture of hot and cold responses from participants. All participants welcomed the effort of socialisation, and enjoyed informal conversations with their colleagues, while admitting that fatigue would sometimes set in.

"we did all the typical Zoom/Meet stuff, although this has reduced since the start of the pandemic. We did happy hours, coffee mornings, different things to try and recreate the serendipitous, we had this activity where you would randomly be assigned to chat to someone for like 10 minutes and then the next day you would have someone different. I got Zoom fatigue from this, those interactions that seem so brief in person didn't feel like that online, they felt longer and more drawn out."

7.4 Information and resources

One positive experience a number of new hires quoted was their interaction with online resources, tools, and knowledge bases. People felt that they had more time to engage with online training or explore online resources available to them, something they might not have been able to spend a lot of time on had they been onboarded in a face-to-face scenario where there often is not enough time to absorb or reflect on the information. One person in particular expressed gratitude for having a lot of time on her own to try and understand their role as they re-entered the workforce after a few years and needed to adjust to the change slowly.

However, when it comes to information and resources, it is more important than ever to ensure a positive learning experience. Discoverability of resources should be made as simple as possible, and the quality is expected to be high. One respondent who has onboarded frequently over the past few years, shared that often not enough effort is made to make engagement with a-synchronous learning opportunities like knowledge bases, wikis or online training modules high quality experiences. We believe this provides food for thought as remote onboarding experiences continue to evolve.

7.5 Cross functional connections

Finally, we would like to mention that new hires really appreciate meeting new people in different roles, teams, and divisions to build their network and understand the context of their and other people's role as well as getting to know the objectives of the organisation at a strategic level. Some people were part of a cohort of new hires, which facilitated a shared experience, whereas others were introduced to lots of different stakeholders in the organisation.

> *"(I was) set up with intros to different people. I got a sense of what everyone does and who to go to get certain information. We use IMs to quickly get in touch with each other to ask questions or to be directed to knowledge repositories. Overall, the relationship building has been very good with people from different disciplines"*

8. Additional Insights

8.1 Customising Onboarding

One of the most important findings of our initial literature research was that organisations often apply a one-size-fits all approach to onboarding. This is understandable to a certain extent, especially because a lot of processes and people need to align to realize an onboarding strategy and standardisation is a logical objective to achieve a smooth experience.

However, through our field research we realised that a new hire is not 'a type' of person but instead displays a huge amount of diversity. Every person joining a new job and organisation has a different background, level of experience, set of skills, motivation to apply for the role and join the organisation, ambition and personality. Several people commented on wanting or appreciating a customised onboarding approach, one that is specific to their role, experience level and needs. There are two ways to look at this: you can either build a completely custom onboarding experience for a new hire, which is what might happen in a small organisation that does not onboard many new people. Or you can provide new hires with flexibility and choice. Regardless of the option an organisation chooses, there are two critical elements to making an onboarding experience feel unique: understanding the needs of the new hire and putting a framework for feedback in place. This allows for open communication between the new hire and the organisation that uncovers the needs and insights to shape the onboarding experience around.

8.2 Technology 'Apprehension'

With all this talk of technology it is important to acknowledge again that there is a sense of technology fatigue, particularly among older new hires who would not have had to deal with this level of technology onboarding in previous roles. One participant spoke of the glut of new tools available to them and their team which they thus far had tried to avoid as much as possible, but they understand that there is an inevitability of having to come to terms with these tools.

> *"With regards to all the technology and tools required for remote working, It all feels very precarious. I'm 51 and I think maybe it's because I'm getting older. There is a push for more asynchronous communications, they use things like Fellow to review feedback*

from meetings and stuff, and also to list topics for upcoming meetings, or create and edit short videos and greetings. So far I have managed to avoid using these kinds of software too much, but I feel like it's looming that I will have to get to grips with them."

9. Summary and Recommendations

Having interviewed the Pat persona and collected survey feedback, have we validated our assumptions about Pat?

Assumption 1: Pat needs to work remotely & adapt to this 'new' working environment and feel valued in his new role

Pat does need to feel valued in his role, both for his own sense of satisfaction and so that he does not feel like he is behind his peers. However, it can be more difficult for Pat to make an impact from a remote setting, Pat may find it harder to prove themselves in a remote environment because they can't build an organic sense of rapport or team spirit with colleagues and managers. Pat needs to adapt but we know that this means different things, they need to adapt to organisational structures, social relationships, asynchronous knowledge discovery and virtual communication channels.

Assumption 2: Pat needs to complete all his required training as quickly as possible after starting his new role and be seen as reliable & productive

We all know about training in new roles, but it is clear that Pat may feel a new sense of isolation in his first few weeks, as he engages in standardised and compliance training. We know from talking to one of our Pats that excessive documentation and process driven training can reduce engagement, and Pat will just feel that they need to get this done as soon as possible thereby possibly overlooking important information. Pat can benefit from being assigned to groups of fellow onboardees who are following similar training paths, this allows Pat to feel a sense of inclusion and progress, and that there is a purpose to their training.

Assumption 3: Pat needs to feel that he has made the right decision in starting work with his new company while understanding all the related corporate products and solutions

This is related to the culture of the organisation. Pat's sense of 'fitting in' and thus their sense of satisfaction with the new role depends on the ability of the organization to integrate Pat.

This can mean a number of things; we have seen examples from the data of Pat being introduced to different stakeholders and understanding how their roles relate to Pat's. We also saw how organisations tried to provide context to Pat on how and why decisions are made, and on the type of terminology and parlance used. We have also seen how organisations attempt to socialise Pat through organised peer bonding and team building. These activities have to be managed carefully, as they can cause fatigue for Pat.

Assumption 4: Pat needs to have a mentor or buddy to support him in his new position and needs a reason to interact with new colleagues and managers

Pat needs a mentor or buddy, but this should be on an as-needed basis depending how steep a ramp Pat has to climb. We have seen examples of Pat being assigned to a hands-on mentor who may directly supervise them through tasks, while we have also seen a mentor being used in an 'if you have any questions, my door is always open' capacity. This all depends on Pat's previous experience and skillset, and how much they need to know about their new organization. In a remote setting, the latter approach may not be as effective as Pat may not feel comfortable having to arrange formal virtual communications with a mentor (Pat doesn't want to seem needy, or found to be not knowing something, or feel like they are interrupting). Organisations should be aware of Pat's potential apprehension in this sense and manage it appropriately.

Assumption 5: Pat needs to be seen as an expert in his role as quickly as possible

Don't we all! This goes back to 'feeling valued'. We know Pat wants to do well, and he wants to be seen to be doing well. In remote roles, this can be difficult. We have heard from our Pats of the need to carefully procure an online presence through Slack and email channels, and that this style of communication can be burdensome and also lead to Pat feeling noxious about putting information into written communications (if I'm wrong there is a written record). We also have seen evidence of the imposter syndrome surfacing, that Pat feels like they are behind in their work, especially when compared to peers. Organisations need to

manage Pat and his expectations, assuring him that nobody is an expert in their first few months, and that there are clear milestones and goals for him to reach.