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### Accelerating Onboarding

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Accelerating Onboarding  
by

Koheun Lee

An Abstract of a Project  
in  
Creativity and Change Leadership

Submitted in Partial Fulfillment  
of the Requirements  
for the Degree of

Master of Science

May 2022


Buffalo State  
State University of New York  
Department of Creativity and Change Leadership

## ABSTRACT OF PROJECT

### Accelerating Onboarding

This project involved the research and development of an onboarding revision action plan for a multinational company based in Phnom Penh, Cambodia that's been operating globally since 2011. The purpose of the project was to conduct research on how to optimize and accelerate the onboarding process for a company that's had to pivot to working with consultants and working remotely in response to the global Covid-19 pandemic in the past couple years. The project aimed to create an onboarding "kit" of sorts to be handed over to a People & Culture hire to implement, but ended up taking the form of an onboarding revision action plan based on the learnings throughout the project.

*Keywords:* creative problem solving, onboarding, action plan, consulting, organizational change, creativity and change leadership, strategy, strategic priorities

  
Your Signature

11 May 2022  
Date

Buffalo State  
State University of New York  
Department of Creativity and Change Leadership

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Dates of Approval:

10 May 2022

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Dr. Susan Keller-Mathers  
Associate Professor

10 May 2022

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Koheun Lee  
Student

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And in the words of Snoop Dogg,

Last but not least, I wanna thank me

I wanna thank me for believing in me

I wanna thank me for doing all this hard work

I wanna thank me for having no days off

I wanna thank me for, for never quitting (Snoop Dogg, 2019, 0:03)

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## **SECTION ONE: BACKGROUND TO THE PROJECT**

### **Purpose and Description of Project**

The purpose of my project is to accelerate the onboarding of new hires, specifically short term consultants, at a small, multinational company based in Phnom Penh, Cambodia. They've been operating in Southeast Asia and Africa since 2011. Their mission is to design solutions that improve the lives of people at the base of the economic pyramid. Using behavioral frameworks, they unpack barriers and motivators that influence human behavior to ensure that interventions are designed to empower people with the right information, motivate them to act, and ensure the environment surrounding them enables them to adopt desired behaviors. Their clients are multilateral organizations, NGOs, impact investors, and commercial enterprises. The sectors they focus on are: health & wellbeing, food and sustainable agriculture, environment & climate change, and economic & financial inclusion. To give a couple concrete examples of the projects they work on, two of the recent projects I supported were on "How to reduce contamination in the meat value chain in Uganda?" and "How to increase food diversity among Cambodian pregnant women and lactating moms?"

I've worked with this company for nearly 10 years and across multiple departments. For the past couple years, I've been supporting the CEO on company strategy and I'm currently serving the Chief of Staff role, managing the strategy, activation, and implementation of the company's strategic priorities.

Throughout the Creativity and Change Leadership Master's program, I've been exploring the relationship between creative problem solving and strategy: where the two intersect and how they can support each other. Specifically, I've been interested in how Creative Problem Solving (CPS) can be applied to improve efficiency in the workplace, whether it's using CPS

tools and methods to make work easier for myself or applying the process or frameworks to work through larger organizational issues.

The first scholarly paper I wrote in CRS 559: Principles of Creative Problem Solving was titled “The Relationship between Creativity and Organization.” I went on to write a big question paper called “Strategy Needs Creativity” for CRS 635: Creativity and Change Leadership. And for my last remaining elective during the fall 2021 semester, I took a strategic management and innovation course in an effort to dive deeper into strategy. In considering a topic for my master’s project, something related to company strategy was always on the back of my mind. After finding out the parameters of the project, mainly the fact that it had to be completed within the semester, I knew I had to narrow the scope of my focus. One of the strategic priorities for this year is to create a frictionless consultant journey. Addressing the entire consultant journey, from the moment someone gets contacted for hire until the project ends and they receive payment for their services, is a massive undertaking. Therefore, my focus for this project will be on onboarding and orientation—looking at ways to accelerate onboarding and getting consultants up-to-speed as quickly as possible to hit the ground running.

### **Rationale for Selection**

#### **Why Select Onboarding in General?**

Many new hires aren’t fully invested when they start a new job. According to Wynhurst Group, a human resources (HR) consulting firm, 22% of staff turnover occurs within the first 45 days of employment (Maurer, 2015). Amongst new employees, those who go through a structured onboarding process are 58% more likely to stay with a company for more than three years. Employee engagement levels tend to be highest during an employee’s first 90 days. However, if engagement levels are low from the beginning, it can be extremely difficult to raise

them later on. The problem is that most companies lack a strategic onboarding process. It's one of those tasks that sits perpetually on a to-do list, but doesn't make progress because there are too many other competing, and more urgent priorities (Ramirez, 2018).

The reality, unfortunately, is that inconsistent onboarding procedures have a negative financial impact on employers. Despite the time, energy, and resources that are put into recruiting new hires, research shows that one-third of new hires look for a new job within the first six months and one-quarter of new employees leave before a year on the job. The total cost of turnover for employees typically ranges from 100-300% of the individual's salary (Graham, 2020). Comparatively, effective employee onboarding programs increase employee performance by up to 11 percent (Maurer, 2015). It's not just about the cost implications: culture, job satisfaction, morale, and productivity are also hugely impacted by effective onboarding. Onboarding isn't a one-time event, it's an ongoing talent strategy that companies should prioritize.

### **Why Select Onboarding for This Company?**

In the case of the company that I work for, onboarding would be especially helpful given the changes they've had to undergo as a result of Covid-19. Much of the company's work is project-based and a majority of the projects the company works on requires a length of time in the field during the research and testing phases. With travel restrictions the past couple years, and how travel has changed as a result of the pandemic, it makes more business sense to hire consultants locally as much as possible. Consequently, the company is considering adopting a more consultant-focused model, as opposed to hiring full-time staff to be based at headquarters.

The challenge for the company is balancing changing timelines, sometimes caused by delays in contracting, and onboarding consultants to the company's specific ways of

implementing projects, within short time frames. Another factor to consider at the moment is the lack of a point person for onboarding-related matters because the scope of onboarding is currently split up between people in different departments. The goal would be to set up an “onboarding kit” of sorts to coincide with the hiring of a People & Culture Manager in the third quarter of 2022 to take forward the implementation of the onboarding initiative.

## SECTION TWO: PERTINENT LITERATURE

Onboarding and orientation are not new topics by any means. To gain a better understanding of best practices and how successful onboardings are structured, I will need to research how different companies, specifically companies with a consultant or short-term hiring model, run onboarding. In addition, it might be worth exploring some principles of curriculum development and adult learning to inform how to structure pockets of information for people to quickly digest. I would also love to conduct some informal interviews to learn more about the onboarding ecosystem and personal experiences to gain inspiration and insights. As part of the project itself, I will be including the results of my research in my Outcomes chapter in Section Four as one of my products.

The main frameworks I will be pulling on to implement this project are: creative problem solving (CPS), human-centered design (HCD), elephant, rider, path (ERP), and the Torrance Incubation Model (TIM). See Section 3 for more details about each framework and its relevance to this project.

Below is a beginning list of resources to explore as part of my research. They are categorized by: onboarding, curriculum development, adult learning, and interviews.

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#### **Onboarding**

**Objective: to learn how companies do onboarding: what works and what doesn't work?**

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### **Curriculum Development**

**Objective: To inject best practices regarding curriculum development into the design and development of an onboarding program.**

- Badley, K. (2019). *Curriculum planning with design language: Building elegant courses and units*. Routledge.
- Marzano, R. J., Frontier, T., & Livingston, D. (2011). *Effective supervision: Supporting the art and science of teaching*. ASCD.

### **Adult learning**

**Objective: To understand how adults learn and incorporate recommended techniques into the design of onboarding.**



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## **Interviews**

**Objective: To learn about the company's current onboarding process and understand what's working and not working in order to optimize the process, rather than reinvent the wheel.**

Interviewees TBD.

Draft interview questions for new hires:

- On a scale of 1-5 (1 - strongly disagree to 5 - strongly agree), how do you rate the following statements regarding your onboarding?
  - I feel like I really got to know the company
  - I feel like I really got to know the project work
  - I feel like I really got to know my job and what's expected of me
  - I feel like I really got to know the team
- How was your onboarding experience?
  - What worked?

- What didn't work? Was anything missing?
- What questions do you have?
- What ideas do you have for improvement?
- What was a highlight of your onboarding?
- What was a lowlight of your onboarding?
- What are some ideas you have for the format of onboarding content (eg. Wiki, guide, videos, etc.)

Draft interview questions for company:

- What works with the current onboarding process?
- What doesn't work?
- What questions do you have?
- What ideas do you have for improvement?
- What are some ideas you have for the format of onboarding content (eg. Wiki, guide, videos, etc.)

### **SECTION THREE: PROCESS PLAN**

The dream for this project would be to examine and distill some of the key literature described in Section Two to set up the People & Culture Manager hire for success. It's not clear to me what form the deliverable will take yet, but I'd like to think of it as an onboarding kit or onboarding "in a box." I don't think it will be a standalone piece, per se. I imagine there will need to be an owner of the kit to facilitate the implementation of it, but ideally the content is accessible and straightforward enough that it will require minimal hand holding.

#### **Plan to Achieve Goals and Outcomes**

The following are details on the main frameworks that will be used in implementing this project: creative problem solving (CPS), human-centered design (HCD), elephant, rider, path (ERP), and the Torrance Incubation Model (TIM).

#### **Creative Problem Solving (CPS)**

Creative problem solving (CPS) consists of four phases, not necessarily linear or in this exact sequence: clarify the problem, generate ideas, develop solutions, and plan for action (Osborn, 1963). After spending some time gathering data as part of my literature review, I imagine the majority of my implementation time for this project will be spent in the "develop solutions" stage.

#### **Human-Centered Design (HCD)**

Championed by Nobel Prize laureate Herbert Simon, developed and taught by the Stanford University Design School, and leveraged by design firm IDEO, human-centered design is a creative problem-solving process that begins with understanding human needs and ends with innovative solutions to address those needs (Stevens, 2021). The human-centered design (HCD) process is not far from the CPS process. In fact, many of the phases can overlap. They both

include an element of diverging and converging per phase. The element of HCD that I plan to incorporate throughout this project is the “human” element. The “human” — or “user” as they’re sometimes called in HCD — will come into play during the key informant interviews (KIIs) where I plan to interview some former and current consultants and again during testing and iteration where prototypes will be presented to the user for real feedback.

### **Elephant, Rider, Path (ERP)**

Elephant, Rider, Path (ERP) is a change framework created originally by psychologist Jonathan Haidt and later adapted by Chip & Dan Heath in the book *Switch: How to Change When Change is Hard* (C. Heath & D. Heath, 2011). It uses the metaphor of an elephant, rider, and a path to explore the elements required in order to bring about change. The rider represents our rational side, that most people mistakenly assume is the part of us that’s in charge of making decisions. The elephant represents our emotional side, the side that influences outcomes of situations based on our emotions. The path represents the environment that affects how easy or difficult it is to take action. At the end of the day, it’s a strategy that incorporates all three that really leads to change: directing the rider, motivating the elephant, and shaping the path.

### **Torrance Incubation Model (TIM)**

The Torrance Incubation Model (TIM), originally developed by E. Paul Torrance provides a framework for the development of lessons consisting of three stages: Heightening Anticipation, Deepening Expectations, and Extending the Learning (Torrance & Safter, 1990). Though it is specific to lesson planning, I believe the stages can inspire the design of an onboarding program. I’m not sure if/how creativity skills will be infused, but will keep that element in mind as I progress with this project.

### Project Timeline

Here is a rough timeline for project milestones to meet the end of semester deadline.

Activity	Estimated Hours	Deadline
Literature Review	20 hours	March 11, 2022
Informal Interviews	10 hours	March 11, 2022
Mini-Ideation for Format	10 hours	March 18, 2022
Developing Content	20-40 hours	April 8, 2022
Poking Holes (User Feedback)	10 hours	April 22, 2022
Revisions and Finalization	20 hours	April 29, 2022
Final Project Due	10 hours	May 2, 2022

### Evaluation Plan

Below is a brief description of deliverables tied to the key activities listed in the project timeline section.

Activity	Deliverable	13 March Status/Updates
Literature Review	Key findings and best practices write up	<a href="#">Literature Review Notes</a>
Informal Interviews	Gap analysis and key insights write up (TBD: document or deck)	Pushed back a week because of schedule conflicts
Mini-Ideation for Format	Ideation session & final selection of idea for format (TBD: via Miro or MURAL)	Combine with informal interviews
Developing Content	Prototype of onboarding kit	
Poking Holes (User	Feedback session (WWQI or	

Feedback)	PPCo) & consolidated list of feedback	
Revisions and Finalization	Revised kit & rationale for selected changes	
Final Project Due	Final onboarding kit & mini implementation guide	

## SECTION FOUR: OUTCOMES

For this project, I compiled a brief literature review to inform the structure and content of an abbreviated onboarding kit to hire new, short term consultants. It wasn't immediately apparent what exactly the "onboarding kit" would be at the start of this Master's project. The goal was to create something that would make onboarding more standard, easier, faster, and effective for new hires. Through the activities completed as part of the project, it became clear that what's required to reach the goal of accelerating onboarding is an action plan to help move this initiative forward. I've dubbed this the "onboarding revision action plan" and go into more detail about it at the end of this section.

The literature fell into themes of onboarding, curriculum development, and adult learning. An additional outcome of the project is an audit of this company's current onboarding process. The key takeaways from this exercise are described following the literature review. The final product of the project is an onboarding revision action plan that proposes a revised onboarding process as well as recommendations on how to move forward with implementing the new procedure.

### Literature Review

#### Onboarding

#### **Objective: To learn how companies do onboarding: what works and what doesn't work?**

The purpose of the onboarding bucket of literature was to learn what works and what doesn't work in regards to onboarding. What have successful companies done in the past and what are lessons learned that can be copied if successful and avoided if unsuccessful. The key takeaways from these readings can be summarized into the following: create a process, assign a

person, and use technology to facilitate the process. Discussions around creating the onboarding content and curriculum will be outlined in the curriculum development section.

### ***Create a Process***

Contrary to popular practices lately, free food and perks aren't what people crave when they start a new job. Important and overlooked factors when it comes to onboarding include: receiving organized, relevant, and well-timed content. It's important to keep in mind that onboarding is not a one-time event, but an ongoing process that should extend beyond the first day, or even week, of work (BambooHR, 2014). The onboarding process should start before the first day of work and can include elements such as a great welcome email (BambooHR, 2018). Srimannarayana (2016) notes that some organizations include too many complex tasks and information for employees to realistically digest, while others offer too few items that fail to adequately prepare employees. Organizing and streamlining the onboarding process and bringing a new hire through it communicates that the company values them and wants them to succeed.

Supporting tools and processes for onboarding include a written onboarding plan and stakeholder meeting. A written onboarding plan is a formal document or roadmap that outlines the specific timeline, goals, responsibilities, and support available to new hires. The most effective onboarding plans are usually written, communicated to all members of the company, consistently applied, and tracked over time. Stakeholder meetings are check-in meetings at intervals to help new employees get the information they need in a timely manner (Bauer, 2010).

### ***Assign a Person***

The key to making new employees productive quickly is to help them immediately build an informational network with co-workers. Organizations that are more successful at integrating newcomers use a relational approach. This helps new hires to rapidly establish a broad network



of relationships with co-workers that they can tap into to obtain the information they need to become productive. Co-workers are instrumental in helping newcomers figure out the real issues that need to be addressed, as well as identify the important people that are relevant for a particular issue (Rollag et al., 2005).

A common myth in regards to onboarding is that mentors are best at getting newcomers integrated. However, research conducted as part of “rapid onboarding” found that what often separates rapid onboarders from their slower counterparts is the presence of a “buddy” (Rollag et al., 2005). According to the research, having someone who new employees can comfortably ask questions to that are trivial or politically sensitive is key to integration. Buddies can be officially assigned or emerge informally. This requires companies to adopt a new mindset and change from an informational approach to a relational approach. Rather than asking “*What* does my new hire need to know?,” the question should be “*Who* does my newcomer need to know.” The good news is, this shift doesn’t necessarily entail a greater commitment of managerial time or resources (Rollag et al., 2005).

### ***Use Technology to Facilitate the Process***

Technology can be used to follow the onboarding process, automate basic forms, track progress, and help stakeholders monitor new employees to see where they may need additional support (Bauer, 2010). This may be expensive to implement for smaller companies, however, it can enable self learning for the new hire as well. Fog Creek, for example, uses Trello for onboarding their new hires. The board they created is full of first day and first week tasks, most of which the new hire can work through at their own pace, including tasks such as joining the team’s calendar and adding themselves to the company’s “who’s who” board (Cooper, 2016).

**Case study highlight: Buffer**

Buffer, a software application company with 85 employees living and working in 15 countries around the world, conducts their onboarding bootcamp over the course of 45 days, using a three-buddy system, and supporting technology. The 45 days include a variety of scheduled tasks and check-ins. The three-buddies that are assigned to new hires are:

- Leader buddy - an experienced member of the team whose key role is to mentor other buddies and lead conversation with the bootcamper (what Buffer calls new hires).
- Role buddy - someone on the team who understands the role that the bootcamper is joining the team to play. They are there to help answer questions and teach the bootcamper about their role.
- Culture buddy - an experienced member of the team who's shown that they consistently are able to give praise and feedback around the culture-fit of new and existing team members

At the time their blog was published, the programs Buffer were using to support the onboarding program were [HelpScout](https://helpscout.com) (helpscout.com) and [Trello](https://trello.com) (trello.com) (Dutel, 2015).

**Curriculum Development**

**Objective: To inject best practices regarding curriculum development into the design and development of an onboarding program.**

The purpose of reviewing curriculum development literature was to learn principles and theories regarding curriculum development to frame the content for onboarding. What are the principles, theories, and frameworks in curriculum development for education that can be

borrowed in developing an onboarding curriculum? The main learnings from these readings can be captured by: design principles that apply to curriculum development, the four domains of education's knowledge base, and onboarding categories.

### ***Design Principles***

Badley states that there needs to be balance in creating curriculum. The ten principles of design that should be taken into consideration when designing a unit are as follows:

- Strong centers: this answers what's the *point*? What's the main idea and why are we doing this?
- Boundaries: boundaries are important as lacking them fails to draw focus to the center
- Entrances and exits: entrances should be inviting and it's important to know when units, topics, or themes begin and end.
- Coherence and connections: parts of a lesson, unit, or course need to connect to each other in obvious ways.
- Green spaces: there need to be spaces in lessons to rest and breathe.
- Public and private: there should be both a physical space students can be alone if they need to be as well as civic celebration for accomplishments.
- Repetition and variety: repeated elements strengthen coherence and continuity, while variety increases engagement.
- Gradients, harmony, and levels of scale: this involves incorporating a range of sizes, activities, assignments, and assessments to introduce the complete scope of contents slowly.
- Master plans and organic development: while it's important to have a master plan to begin with, there's also a need to leave space for organic development.

- Agile, light structures: it's important to keep in mind that students face a variety of forces and stresses from both inside and outside of school (Badley, 2019).

The above design principles should be considered and taken into account when designing an onboarding curriculum for a company.

### ***Four Domains***

Marzano et al. (2011) outline four domains to measure teacher effectiveness that ultimately lead to student achievement. They include:

- Domain 1: Classroom strategies and behaviors
  - Routine segments:
    - What will I do to establish and communicate learning goals, track student progress, and celebrate success?
    - What will I do to establish and maintain classroom routines?
  - Content segments:
    - What will I do to help students effectively interact with new knowledge?
    - What will I do to help students practice and deepen their understanding of new knowledge?
    - What will I do to help students generate and test hypotheses about new knowledge?
  - Segments enacted on the spot:
    - What will I do to engage students?
    - What will I do to recognize and acknowledge adherence or lack of adherence to classroom rules and procedures?

- What will I do to establish and maintain effective relationships with students?
  - What will I do to communicate high expectations for all students?
- Domain 2: Planning and preparing
  - Planning and preparing for lessons and units
  - Planning and preparing for use of materials and technology
  - Planning and preparing for special needs of students
- Domain 3: Reflecting on teaching
  - Evaluating personal performance
  - Developing and implementing a professional growth plan
- Domain 4: Collegiality and professionalism
  - Promoting a positive environment
  - Promoting exchange of ideas and strategies
  - Promoting district and school development

While these domains, as opposed to the design principles above, come across as education-focused, the sub points and questions asked per domains 1 and 2 can be asked in designing onboarding content. Domain 3 and 4 regarding reflections and collegiality are things the companies should incorporate as part of their onboarding as well, constantly seeking ways to improve either by self reflection or by exchanging ideas and learning (Marzano et al., 2011).

### ***Onboarding Categories***

There are a few different ways to look at categories of onboarding. Bauer (2010) explains that an effectiveness onboarding process includes four critical building blocks:

- Compliance - this is the lowest level of onboarding that includes teaching employees basic legal and policy-related rules and regulations
- Clarification - ensuring that employees understand their new job and all related expectations
- Culture - providing employees with a sense of organization norms, both formal and informal
- Connection - the last level indicates vital interpersonal relationships and information networks that new employees must establish

Another way to look at onboarding by topics is:

- Organizational onboarding - teaching new hires how things work and helping them assimilate
- Technical onboarding - new employee orientation processes occur while employees are under a tremendous amount of stress (Caldwell & Peters, 2018). Even new hires with deep areas of expertise can become insecure when they suddenly feel like beginners. In this regard, it's important to define what good looks like and setting up early wins and short-term goals (3, 6, 9 months) (Carucci, 2018)
- Social onboarding - this includes building a sense of community for new employees during onboarding and throughout their time at the company

### **Adult Learning**

**Objective: To understand how adults learn and incorporate recommended techniques into the design of onboarding.**

The purpose of exploring literature about adult learning was to both understand how adults learn as well as gain insight into how best to facilitate learning for adult learners. The

main learnings here can be categorized as: four assumptions of andragogy, elements of effective practice in facilitating learning, learning theories and stages of self-directed learning (SDL).

### ***Four Assumptions of Andragogy***

Andragogy refers to methods and principles used in adult education. Assumptions in regards to adult learning are that:

- Adults desire and enact tendency toward self-directedness as they mature;
- Adults' experiences are a rich resource for learning;
- Adults are aware of specific learning needs generated by real life tasks or problems;
- Adults are competency-based learners in that they wish to apply newly acquired skills or knowledge to their immediate circumstances.

All of the above work to an advantage when it comes to onboarding.

### ***Elements of Effective Practice in Facilitating Learning***

According to Brookfield (1986), in order to help adults enhance their capability to function as self-directed learners, the educator must do the following:

- Progressively decrease the learner's dependency on the educators
- Help the learner to understand how to use learning resources, especially the experiences of others
- Assist the learner to define his/her learning needs
- Encourage the use of criteria for judging
- Facilitate problem-posing and problem-solving
- Reinforce self-concept of the learner as a learner and doer by providing for progressive mastery
- Emphasize experiential, participative and project instructional methods

In applying this to facilitating onboarding, the learner in this scenario is the new hire and the educator would be the company or the person leading the onboarding.

### ***Learning Theories***

Humans have always engaged in learning — learning to survive, learning to live in a social group, and learning to understand the meaning of our experiences. The different learning theories are as follows:

- Behaviorism believes that learning is a change in behavior. Behaviorism is particularly evident in adult careers. Much of adult vocational education is focused on identifying skills needed for specific occupations.
- Humanism states that learning is about the development of the person.
- Cognitivism is the thought that learning is a mental process.
- Social cognitive theory views learning as social and context bound. It highlights that much human learning occurs in a social environment by observing others.
- Constructivism equates learning to creating meaning from experience.

While containing elements of all, onboarding can be seen most closely relating to behaviorism and social cognitive theory.

### ***Self-Directed Learning (SDL)***

Much of adult learning relies on adults being self-directed learners. The stages of SDL are:

- Stage 1: Dependent, lacking self-direction
- Stage 2: Interested and confident
- Stage 3: Involved, engages at self-directed learning, posses knowledge and self-efficacy for SDL



- Stage 4: Self-directed learning, able to plan, execute, and evaluate learning

In initiating onboarding, it may be worthwhile to gauge what level new hires are at in order to decide how to approach onboarding to fit their learning needs.

### **Onboarding Process Audit**

The following is an audit of the company's current onboarding process using a feedback mechanism that the company is familiar with called the WWQI - what works, what doesn't work, questions, and ideas for improvement. This audit was conducted using learnings from the background reading. It is recommended as part of the onboarding plan to gather consultant feedback and include inputs from those surveys and interviews into the audit.

#### **What Works?**

- Company has an onboarding plan.
- Company does an excellent job of the compliance level of onboarding.
- Orientation begins before day 1.
- The organizational and social onboarding of the company are good.

#### **What Doesn't Work?**

- There is no point person for the technical onboarding of new team members — the default point person is the CEO, who's stretched for time as it is.
- There are not enough managers/supervisors/buddies available to give time to the onboarding of new staff.
- The company errs on the side of providing too much information and not always staggered effectively.
- Current onboarding is time-consuming as it has to be customized per project team and hire.

## Questions?

- How can the company build a sense of community for remote, short-term consultants?
- What's the return on investment for short-term consultants who will eventually leave the company?
- What's the best technology to support the company with onboarding? BambooHR? Bloo? Trello? Wiki? Microsite?
- Who is/are the best people to serve as the point-person(s) for new hires in regards to technical onboarding?

## Ideas for Improvement

- Assign a point person (or people) to each new hire or project team (in the case of a fully consultant team).
- Gauge where new hires are in regards to the stages of self-directed learning (SDL) and approach onboarding from there.
- Set up early wins and short-term goals for consultants to boost their confidence during this vulnerable time.
- Try an onboarding platform - Would BambooHR work? Can the company use this with short-term consultants?
- Include the glossary we're using in reports as a way to get consultants up to speed on company jargon.
- Create an FAQ document for new hires to field repeat questions that come up in onboarding (add the question: "What questions did you have when you first started?" to the onboarding survey).
- Build a trusted consultant roster so the company can rehire consultants and not have to

onboard people fresh every project.

### **Onboarding Revision Action Plan**

Based on the work that was completed throughout this master’s project, the final deliverable of the onboarding “kit” transformed into an onboarding revision action plan with guidance on how the company can take this initiative forward. Below is a simple action plan for the company to follow in updating and improving their onboarding process. The action plan makes use of a RACI chart, which is a table that assigns stakeholders to each task that goes into completing a project. By naming who is Responsible, Accountable, Consulted and Informed about each task, the work can move forward with clear communication between all the stakeholders. (Miranda & Watts, n.d.). The first step in the onboarding revision plan is for the company to complete the “RACI” and “due date” columns based on current company priorities and available resources.

Task	RACI				Due date
	Responsible	Accountable	Informed	Consulted	
Complete RACI					
Mail out consultant survey					
Schedule follow-up interviews					
Analyze consultant feedback with the ERP behavioral analysis framework - what do they know/not know (rider), what are their barriers and motivators (elephant), how can the path be made easier?					
Revise the existing onboarding SOP based on feedback					

Revise the current onboarding curriculum based on learnings from background reading and taking TIM into consideration - what can be done to heighten anticipation, deepen expectation, extend the learning?					
Calculate timings and create an onboarding schedule for consultants and share with both consultants and teams so as to align on expectations from all sides					
Create a mini onboarding team (so as the burden doesn't fall on one person and there are several people that can fill each of the "buddy" roles)					
Conduct a kick-off with the onboarding team to get everyone's buy in and excitement to move forward with this initiative					
Decide on an online technology to support the process					
Transfer onboarding process and tasks to selected online platform					
Test the new onboarding process with consultants					
Gather feedback regarding their onboarding experience					
Iterate and improve the onboarding process at regular intervals (eg. every quarter)					
Standardize and optimize onboarding process					

## SECTION FIVE: KEY LEARNINGS

This project started with the ambition to create a final onboarding kit that could be handed off to a new People & Culture hire to implement. Throughout the life of the project and other competing company priorities, the project shifted and the final output ended up becoming an onboarding revision plan. This was informed mostly by the status of the company's strategic priorities and initiatives for the year and also by new learnings from the literature reviewed that brought to light the full scope of considerations in improving an existing onboarding process.

The following is a PPCo to analyze key learnings and evaluate the outcome of the project. PPCo, which stands for Pluses, Potentials, Concerns, Overcoming concerns, is an evaluation tool that uses a positive approach to evaluate an idea (Creative Education Foundation, 2015). While this project isn't a single idea, per se, this format of analysis can be borrowed to both evaluate the project progress to date and also improve upon the plan moving forward.

### **Pluses**

Pluses have been adapted to answer the question: "What went well about the project?"

- Reviewing a variety of literature to inform aspects related to onboarding (eg. curriculum development and adult learning) widened the scope of possibilities as well as better informed other factors (such as frameworks and principles) to take into consideration in improved both onboarding content as well as the onboarding process
- The literature provided insights regarding where the state of mind of new hires or where new hires are at when beginning a new job and how that can affect onboarding
- Pivoting to do an audit of the existing onboarding process rather than starting from scratch helped bring to light that there are things the company is already doing well and doesn't require someone to reinvent the wheel

- The project resulted in a fairly straightforward action plan on how to move forward with the implementation of revising the existing onboarding

### **Potentials**

Potentials answers: “What other benefits might result as part of this project?”

- The content learnings from this project might result in a tighter onboarding curriculum and experience for new hires
- It might lead to more consultants having better experiences with the team and leading to a solid consultant roster that can be leveraged when building teams for new project
- It might save the company money in the long run in a couple ways:
  - Optimizing the onboarding process
  - Reducing the need to constantly onboard new consultants
- It might make employees happier by providing them opportunities to mentor new hires through the buddy system
- It might make the company an awesome place to work as people feel they bring value and are empowered to utilize their training and skills in addition to learn new methods and ways of working at the company
- It might turn consultants into longer term hires and result in the company being able to take on more projects, ultimately leading to growth.

### **Concerns and Overcoming Concerns**

Concerns answers: “What are the biggest concerns about this project?” This has been merged with: “Ideas to overcome concerns” for the sake of proximity and clarity between ideas and concerns themselves.

- Concern: How to adapt for consultants? The background reading conducted as part of this project wasn't necessarily about short-term consultants in particular. The focus were new hires (mostly full-time employees) and learners (in the context of curriculum development and adult learning)
  - Idea: review current onboarding content with both project teams and consultants to identify what the vital content for short-terms consultants to know are.
- Concern: How to make time to move forward with this work plan? With other urgent tasks in the company, how to make forward to strategic initiatives? If looming client deadlines are always going to win in a given situation, how to carve out time for more company strategy and growth related projects?
  - Idea: block out slots in people's calendars in advance to have working sessions to progress this initiative.
- Concern: How to incorporate onboarding with other strategic initiatives? Onboarding can be contingent on several things in the company, including the company's business process. If the company's business process is undergoing an update, how can that be factored into the planning for updating the onboarding curriculum and process?
  - Idea: revisit company strategic initiatives on a regular basis to both check on status as well as evaluate how all strategic priorities interconnect with each other.
- Concern: How to hire or upskill the right person(s) to fill the technical onboarding role? For a company that has very specific ways of working, how to ensure that the correct skill and knowledge sets are filling this role?

- Idea: first update the company's onboarding curriculum and train either the new hire or people who will be filling these roles internally in order to ensure that there is alignment and adequate skills and knowledge to fill this gap.
- Concern: How to mitigate the financial implications of onboarding? If one of the biggest cases for investing in onboarding is the return on investment, how to adapt for that when onboarding consultants that only stick around for a limited time period?
  - Idea: figure out a way to create an ongoing roster and easy way to refer back to former consultants as to avoid entirely onboarding people from scratch every time.



## SECTION SIX: CONCLUSION

Ideally, this project would have included inputs from recent consultants themselves. The immediate next steps as per the onboarding revision action plan is to send out a survey to recent consultants and follow those up with interviews to probe and understand a bit more about the consultant experience. The purpose of this would be to inform the current onboarding audit as well as look for ways to adapt the implementation recommendations to fit the needs of short-term hires specifically.

This isn't necessarily a new learning, but the aspect of creativity and change leadership that became more apparent to me throughout this project is the balance of progressing strategic initiatives for a company as competing priorities. Company strategy seems to be one of those things that falls on the backburner when there are seemingly more pressing and urgent matters that have pending deadlines and implications if they aren't addressed. Not being able to focus on progressing company strategy usually just means stagnation or delays in progress and growth - there's no immediate financial cost of it in the same way that missing a deadline on a deliverable could result in.

To continue the work, what I see myself doing is working with the CEO to clear their plate of day-to-day tasks in order to make more time and space for big picture thinking. This might mean finding someone to take on the mental load of daily operations or to fulfill the technical oversight role on projects. Freeing up schedules and headspace will provide an opportunity to focus on implementing initiatives like the onboarding revision plan that may seem second-priority but have huge potential for helping the company mature and grow.

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11 May 2022

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Date