

Article

# Onboarding Handbook: An Indispensable Tool for Onboarding Processes

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**Abstract:** Onboarding handbooks constitute a very important and powerful tool in the socialization and integration processes of recruits implemented by Human Resources. As companies compete to thrive in global markets, the attraction and retention of employees have been given much attention in recent years. One of the strategies developed by companies to achieve this goal are the so-called Onboarding Handbooks given to newcomers, serving as a means of facilitating workers' integration into the everyday processes of the company. As a consolidated research area, many HR studies have been developed around these subjects, as these manuals have been proven to be important tools in the socialization process of the former candidate, now entering the organisational culture of a given enterprise. A literature review was developed according to the main variables of the study of Organisational Socialization processes, strategies, and methods, with special emphasis on the onboarding book. To find out if these manuals correspond to the relevant literature of HR, eight of the onboarding handbooks from several public and private organizations have been analysed following the proposed structure of onboarding handbooks presented in the literature review. In addition, purposeful sampling was followed and content analysis on the handbooks was developed. The paper's contributions are twofold: (a) the authors suggest a complete and up-to-date structure for the contents of onboarding books to be applied by HR managers and (b) compare its structure to several manuals of different enterprises from various sectors of the Portuguese economy. Findings show that the onboarding book remains an important tool and facilitator of organisational integration. Although, the onboarding processes are changing, and even the format of the onboarding books can become different (digital or not), their contents are essential for the socialization of newcomers and a means to organisational culture dissemination as well as containing functional contents such as internal norms and regulations.

**Keywords:** onboarding handbook; organisational culture; human resources; employee integration; organisational socialization



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## 1. Introduction

Recent challenging endeavours have strongly affected the global marketplace (Tortia et al. 2022) and organisations have seen lasting changes all over the world. The recent worldwide inflation; the war on Ukraine raising safety and security issues for companies, employees, stakeholders, providers, and customers; several cultural and social changes and developments that have followed the post-COVID-19 scenario; and global warming, inter alia, have influenced managerial strategies of enterprises worldwide. With changes in peoples' lives, personally and professionally, managers have been trying to adapt the business ecosystem to VUCA World (Mack et al. 2015) contingencies and, more recently, to BANI variables (Evseeva et al. 2022).

Work conditions have been changing because of health issues in the recent COVID-19 context (Pajardi et al. 2022) and during recent lockdowns, new technologies have allowed many workers to perform their professional activities from home, influencing the debate

in favour of a four-day working week (Spencer 2022). These situations have originated changes in recruitment policies and management strategies in several sectors, affecting arguably, the integration and socialization techniques used by companies to improve their success.

Onboarding handbooks are a powerful tool for improving the integration of new employees in a new workplace (Caetano and Vala 2007; Calheiros 2019; Cardoso 2016; Batistič 2018; Rego et al. 2015; Silva 2018). Every organisation should offer an onboarding book as a means of integration, that could serve as a “guide” in the organisational process of a former candidate (Cardoso 2016). This remarkable tool is still relevant to ease the integration and socialization processes of recruits, thus facilitating the work of HR departments all over the world. Several companies have welcome programs where onboarding and job shadowing processes are utilized with the goal of facilitating the integration of newcomers to the company (Batistič 2018; Rego et al. 2015).

Since the seminal works of Feldman (1981) and Van Maanen and Schein (1977), organisational socialization has marked the integration processes of newcomers to an organisation (Calheiros 2019; Rego et al. 2015), using onboarding books (Batistič 2018) as a helpful strategy in the provision of information to a recruit. To perceive whether this tool is still relevant, the authors have developed a literature review on welcoming and integration processes, the organisational socialization process, and organisational socialization strategies. The authors have also revised the onboarding book structure according to relevant literature and analysed eight onboarding books of several organisations of different sectors: (3) Tourism, (1) Wood industry, (1) Public body, (1) Coultancy enterprise, (1) Social support organisation; and (1) Public Higher Education School.

The two main contributions of the paper are the suggestion of a complete and up-to-date structure for onboarding books to be applied by HR managers and the comparison of this structure to several manuals of different enterprises from various sectors of the Portuguese economy. The paper is organized as follows: First, onboarding books are contextualized concerning socialization and integration processes in management and HR theory. In the next section, the authors present a structure for these manuals based on recent and relevant literature. The methodology is presented, followed by a discussion, limitations, and conclusions of the study. Results show that these manuals are still relevant and used in an even larger sense than before, as they also can be tools for the dissemination of organisational culture, as well as more day-to-day information.

## 2. Welcoming and Integrating New Employees into the Organisation

Welcoming and integration is described as a process through which the adjustment of new employees is promoted, both at the social and performance levels, in an effective way, it being important to acquire knowledge of the organisational attitudes and behaviours that help the process of becoming a member of the organisation (Ashforth and Saks 2017; Bauer 2008). It has also been stated that this process should follow three key objectives, which are: to make new employees feel an integral part of the organisation; that they learn about the organisational language, culture, mission, structure, and history of the organisation; and, finally, that they fully understand the basic principles of their workplace (Klein and Weaver 2000).

It should be noted that new employees, even before being welcomed and integrated, have expectations and mental images that may shape the way they see the organisation. If the welcoming and integration process does not meet these expectations, there may be less commitment from the employee to the organisation (Cunha et al. 2016). According to Rego et al. (2015), it is possible to distinguish between reception and integration, stating that reception occurs when the new employee interacts for the first time with the organisation as an effective member. It is at this moment that the employee learns about the organisation's resolutions and begins to contact other employees and his/her manager. Integration, on the other hand, occurs when specific information is given about the employee's function and,

even more so, when the employee becomes, over time, a full member of the organisation with a deep understanding of its culture.

When the new employee joins an organisation, he/she will experience feelings of stress, anxiety, and uncertainty about what he/she will find, he/she will wonder how the employees will react to his/her presence, how the organisation will be inside, how his/her manager will be. To decrease all these internal conflicts with the new employee, some organisations create programs and implement practices that identify key information about the organisation as well as the roles that the new employee will perform. [Armstrong and Stephen \(2020\)](#) stated that the four goals of welcome and integration are as follows:

- (1) To make the process of integration into the organisation easier;
- (2) To help new employees create a positive view of the organisation;
- (3) To help new employees achieve effective performance in the shortest possible time;
- (4) To reduce the likelihood that the new employee will want to leave the organisation.

This process is important both from an organisational and an individual point of view ([Gourova and Gourova 2018](#)). At the organisational level, this process allows for cost reduction and premature personnel leaves, and at the individual level, it allows the employee to have a greater organisational commitment, to structure well his/her psychological contract with the organisation, and as well, for the company to accelerate the learning process of the new employee and promote socialization. There are two types of integration processes, formal and informal ([Castañer and Ketokivi 2018](#)). In a formal integration program, the organisation provides information following a guided and thought program, whereas in an informal integration process, the new employee is introduced to the organisation through daily interactions between him/her and the other members of the organisation ([Maanen and Schein 1977](#)).

The quality of these socialization programs can influence the employees' attitudes and behaviour ([Aranibar et al. 2022](#)), thus benefiting their performance and organisational effectiveness and, at the same time, increasing the possibility of retaining the new employee in the organisation, thus reducing the turnover rate ([Silva and Fossá 2013](#)). For [Krasman \(2015\)](#), the process of admission and integration of a new employee is important, and therefore it should be a process directed in the most correct, clear, and objective way possible so that the organisation can enjoy the best performance of the new employee. If this process is carried out well, both the organisation and the employee benefit from this good integration. We can argue that its essential for organisations to implement formal processes of organisational socialisation, defining clear strategies and steps to ease the onboarding of new people ([Pereira et al. 2020](#)).

For welcoming and integration processes to be correctly carried out, a welcome and integration program should be designed ([Kumar and Pandey 2017](#)) and put into practice by the organisation, which must necessarily have a welcome program that enables the new employee to feel like an integral part of the organisation from the very first moment he/she starts working. Subsequently, a series of actions and activities are carried out where new employees are informed about their responsibilities, rights, duties, and obligations, whether the work they are going to do is individual or collective, and what their expectations are. Information is also transmitted about the organisation, how it works, its principles, mission, objectives, values, organisational culture, and attitude to the market ([Castañer and Ketokivi 2018](#); [Kumar and Pandey 2017](#)).

This transmission of information is central to the avoidance of future problems with the habits, beliefs, behaviours, and/or less-correct attitudes on the part of new employees, because if this information is not transmitted, there is a chance that the newly integrated employees will perform their work in the least convenient way for the nature of the organisation ([Hamilton 2008](#)). During the period of integration into the organisation, the employee should undertake specific training according to the function that he/she will perform.

This training will provide knowledge about the organisational culture of the organisation, the dominant type of management, the types of policies implemented by the Human

Resources department, and information about their job position, among other relevant issues providing the new employee with skills and conditions that will speed up the process of learning the job. The involvement of the other employees is very important in integrating the employee because this ensures that the newcomer will be well-guided in his or her experience (Yadav et al. 2020).

### 3. Organisational Socialization Process

As bringing new employees to an organization should be the beginning of a fruitful relationship but, in the other hand, can also be a lost opportunity for both sides, in order to prevent this last one the organisational socialisation process must be well prepared and designed, the integration strategies should be decided from day one (Stein and Christiansen 2010).

When preparing the integration process of the new employee, the physical space and support material to be used may be prepared, all the necessary documentation for administrative formalities may be prepared and the necessary information may be provided to the future work team to clarify any doubts. According to Castañer and Ketokivi (2018), integration processes for new members can take three different forms that can be used independently or complementarily: (1) delivery to the new employee of an onboarding book and/or other documentation considered necessary (e.g., procedures manual, quality manual); (2) tour around the organisation, carried out according to a previously outlined plan; (3) welcome and integration training.

The socialization process of a company has the goal of facilitating the acquisition of appropriate conduct related to the worker's job performance, skill development, and abilities related to the job and the adjustment to the values and norms of the organisation (Calheiros 2019). In other words, organisational socialization is the process by which an individual acquires the social knowledge and skills necessary to assume an organisational role (Maanen and Schein 1977). The seminal work developed in the early nineteen-eighties by Feldman (1981) is important to mention here. He identified the three phases of the socialization process:

“(1) anticipatory socialization, which encompasses all the learning that occurs before a new member joins an organisation; (2) accommodation, in which the new recruit sees what the organisation is truly like, and in which some initial shifting of values, skills, and attitudes may occur; (3) role management, in which new organisational members master the skill requirements of their job, make some satisfactory adjustment to their work group and organisational values and goals, and deal with conflicts between the demands of their own work group and other groups which may place demands on them”. (Feldman 1981, p. 380)

According to Cooper-Thomas and Wilson (2011) there is a point of convergence in the literature regarding the phases of the socialization process, being grouped into three different phases: pre-entry, encounter, and metamorphosis. In the pre-entry phase, which may also be called anticipatory socialization, the main objective is to provide information to the candidate selected in the recruitment and selection phase, about the organisation and the position for which he/she is applying. This information may be more specific, and may even address aspects related to career progression and departments that would be involved with this progression (Caetano and Vala 2007).

Individuals already have some knowledge of what professional life is like within an organisation, knowledge that they acquired during their academic education, and, at this stage, they put it in context with the reality of the company to which they applied. Candidates should not create inflated expectations about the company, and recruiters should also be careful not to convey the reality of the organisation in an overly positive way because in these situations the candidate feels that his psychological contract has been broken and he loses all confidence he had in the organisation to which he is applying (Rego et al. 2015)

In the encounter phase or accommodation phase, the employee's admission process is initiated. At this stage, the new employee assumes the new duties and starts to learn the competencies necessary for the job, learn more about the organisational culture and understand what is expected of them (Calheiros 2019). It is at this stage that the new employee assimilates the skills needed to perform his or her duties, gathers knowledge about the organisational culture, and understands what the organisation expects of him or her (Castañer and Ketokivi 2018). It is a practice in some organisations at this stage to implement formal programs designed to facilitate the transmission of knowledge. If a problem occurs and essential information is not transmitted or is poorly transmitted, it can be expected that the new employee will feel abandoned by the organisation (Morrison and Robinson 1997).

At this moment, for the new employees, some aspects of the organisation no longer make sense and they feel that the psychological contract they have created with the organisation has been corrupted. It should be noted that in this phase, also the most senior employees of the organisation should be facilitators of the integration and for that, whoever organizes the integration of the new employee should also pay attention to the transmission of information to the team already existing in the organisation (Rousseau 1995).

Last, but not least, the phase of organisational socialization is the metamorphosis phase. The expected result is the emergence of an emotional bond between the person and the organisation, which progressively translates into high levels of commitment, motivation, and satisfaction. However, Cunha et al. (2016) find that these positive effects are limited by the situation of current organisations, as organisational environments are increasingly less conducive to this type of positive occurrence.

Jobs for life are currently no longer a reality for many individuals, since the organisational restructuring (Bozeman 2011) that we have witnessed (e.g., redundancies, downsizing, and restructuring) limits the loyalty to under-written (unwritten and unverbilized) agreement between an individual and the organisation, whose terms include mutual obligations and which interferes with how the employee relates to the organisation (Bozeman 2011). An organisation may not be reciprocal in its guarantees, giving room to develop the idea that relationships between employees and employers are ephemeral and superficial (Liu et al. 2021). It is important to note that throughout the organisational socialization process several entities are generally involved, namely, the Human Resources department, the administration, the hierarchical superiors, the tutors/mentors, the colleagues themselves, and even the clients.

In the figure below (Figure 1) the various phases, or stages, of organisational socialization can be observed: pre-entry, accommodation or encounter, and metamorphosis; these are organized according to a Cartesian referential, where we have the adjustment of the person in the organisation concerning time. But as can be seen, there is a stage of decline in the person's adjustment to the organisation which culminates in the "divorce", the separation of the employee from the organisation.



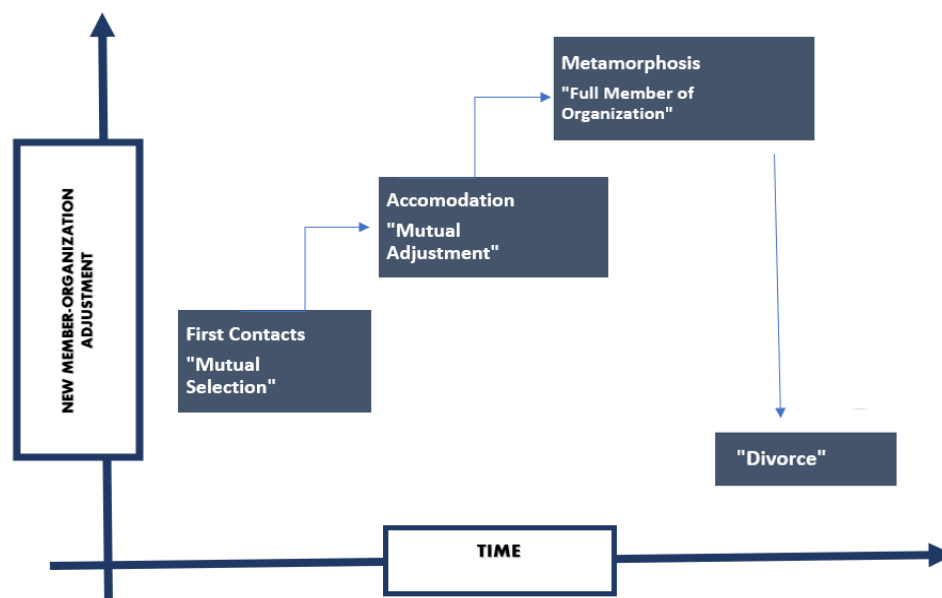


Figure 1. Stages of Organisational Socialization. Source: adapted from Cunha et al. (2016).

#### 4. Organisational Socialisation Strategies

As the concept of Organisational Socialisation has evolved, ideas, concepts, and themes have been added, allowing for the identification of different viewpoints which are inter-related and complementary. Socialization tactics or strategies were originally developed by Van Maanen and Schein (1977) and can be divided into three categories: contextual, content-based, and social. From the De Oliveira et al. (2008), organisational socialization strategies (Table 1) (or tactics) are grouped into three different perspectives: organisational tactics, content and information, and integrative trends. Organisational tactics are seen as being a functionalist approach. They are seen as being organisation-focused and focused on “describing and analysing practices that seek to facilitate individuals’ socialization process” (De Oliveira et al. 2008, p. 121). In this approach, the organisation is seen as being the main entity responsible for the socialization process, and it has to take the initiative to perform actions that interact with and reduce the anxiety and fears of new employees (De Oliveira et al. 2008).

When importance is given to content and information it excludes the organisation from the responsibility of integrating the new employee and passing the task to him/her. It is up to the new employee to be proactive in acquiring knowledge and skills. However, this proactivity may make the new employee too responsible, leading to the new employee’s being solely responsible for his or her success or failure. The organisation is exempt from transmitting information and empowering and training the employee. The integrative tendencies, on the other hand, are seen as a combination of the two previous perspectives (Baruch 2014). Here, the organisation is concerned with having the initiative to integrate new employees, but, also, the employees have room to follow the same line of thought as the organisation and have their appropriate initiatives. Socialization strategies exist in seven dimensions, which are grouped in pairs and cannot coexist in the same situation, since they are opposite to each other (Batistič 2018; Mosquera 2000). In the following table the seven dimensions in question are mirrored:

**Table 1.** Summary Table of Socializing Strategies.

Strategies	Characteristics	Advantages	Disadvantages
Collective	The new employee is integrated either individually or in a group.	The company saves money and time. There is sharing of experiences and emotional support that facilitates the learning process.	Risk of the emergence of groups resistant to the objectives of organisational socialisation.
Individual		The socialisation process is easier for the new member.	The company spends more time and money.
Formal	Socialisation takes place or not within programmes already outlined	Programs tend to reinforce organisational culture.	The absence of other colleagues can cause rigid and less flexible behaviour
Informal		Knowledge learned in an informal environment can be easily appropriate to other organisational contexts	The new employee defines his place in the organisation based on interaction with colleagues who can transmit knowledge that is not under the organisational objectives
Sequential	Programs with predefined order do or do not exist.	Allow the new member to learn from the least to the most complex.	Pressure on the new employee to raise the level of difficulty to perform the most complex tasks
Non-Sequential		Allow the new member to learn on his own time	Pressure on the new employee to perform more complex tasks right at the beginning.
Fixed	Time of duration of the socialisation process may or not be pre-defined	Knowledge of the duration of the socialisation process brings feelings of security to the new employee.	The new employees are penalised if the socialisation process is too rigid.
Variable		More flexibility on the part of the organisation.	If there is no integration time stipulated, the new employee does not know when he is already inserted in the organisation, that is, the employee feels uncertainties in relation to his integration.
Competition	New employees are organised into groups according to skills, background, or ambition. They are subjected to routines of socialisation that stimulate individual action and competitiveness.	The new employees will become more specialised in certain functions and/or tasks.	Competitiveness can become unhealthy for the organisational environment; The specificity of employees' work can make some activities difficult to perform if they are different from their specialisation.
Cooperation	The new employees are arranged in heterogeneous order, making no distinction between them. It creates an environment of cooperation and participation between people.	Working in teamwork and cooperation makes the organisational environment healthier and conducive to good results.	The no differentiation of skills can create problems in the long run because of the non-existence of employees with more specific knowledge about a particular function.
In Series	The new employees are integrated, or not, into the function by senior employees.	The working procedures for new employees will be the same as for old employees.	The danger of work procedures stagnating.
Isolated		In their role, new employees are free to create new working procedures that may restructure the organisation.	They make new employees anxious because they do not yet know how to do their job.

Table 1. Cont.

Strategies	Characteristics	Advantages	Disadvantages
Investment	Socialisation aims to reinforce the new employee's own identity or, on the contrary, to repress it to better accept the organisation's values	Useful when the new employee has previous knowledge relevant to the organisation.	_____
Disinvestment		Useful in organisations with closed working groups that do not want to innovate their way of working	_____

Source: Adapted from [Batistič \(2018\)](#); [Maanen and Schein \(1977\)](#); [\(Mosquera 2000\)](#) and [\(Jones 1986\)](#).

## 5. Methods of Organisational Socialisation

Organisational socialization represents a very important step in engaging people with the organisation and developing advantages for the organisation, since it provides for the dissemination of the organisational culture, promotes interpersonal relationships, reduces the anxiety of the new employee, favours better performance, and facilitates understanding of the new employee regarding his role in the company, thus facilitating the integration of the new employee to the company and favouring his permanence. According to [Chiavenato \(2014\)](#) the company can use five methods to perform organisational socialization, these being:

- Selective process: Socialization begins at the time of selection interviews through which the candidate initiates contact with his future work environment, the predominant culture in the organisation, the co-workers, the activities developed, the challenges and rewards in view, the manager, and the existing management style, among others. Before the candidate is approved, it allows him/her to obtain information and see with his/her own eyes how the organisation works and how people behave in that environment. At this moment, the company evaluates if the candidate meets the requirements and has the necessary competencies and profile, and the candidate evaluates if the organisation meets his expectations and matches his values.
- Job content: The new employee, at the beginning of his entry into the company, should be given relatively challenging tasks, which are at the same time in line with his capacity, and capable of providing him with success at the beginning of his career in the organisation, so that he feels motivated to be gradually given more complicated and demanding tasks. New employees who are given relatively challenging tasks become more prepared to perform the higher tasks more successfully. With this, novice employees tend to develop high standards of performance and positive expectations regarding rewards resulting from excellent performance. When beginners are placed in initially easy tasks, they do not have the opportunity to experience success and the motivation that comes from it.
- Supervisor as a tutor: The company must offer the accompaniment of a supervisor or tutor so that the new employee does not feel lost and little-integrated. This person will be responsible for guiding and supervising the new employee, transmitting clearly what his task is and how it should be carried out technically, in addition to negotiating the goals and results to be achieved, providing feedback, and following up as to all his performance. For new employees, the supervisor represents the connection point between the organisation and the company's image. The supervisor should take care of the new employees as a true tutor, who accompanies and guides them during their initial period in the organisation. If the supervisor does a good job in this respect, the organisation will be seen in a positive light.
- Staff: Other staff members can play an important role in the socialization of new employees. The integration of the new employee should be assigned to a working group that provides acceptance and makes a positive and lasting impact. Working groups have a strong influence on individuals' beliefs and attitudes about the organisation



and how they should behave, so the group's acceptance is a key source for meeting social needs.

- Integration program: This is a formal and intensive program of initial training for new employees and is the main method of socializing new employees into the current practices of the organisation. It aims to familiarise them with the mission of the organisation and its organisational objectives, the language, the internal habits and customs (organisational culture), the structure (existing areas or departments), and the main products and services. These programs normally have a duration of 1 to 5 days and their purpose is, besides presenting the company and the work team, to make the new employee learn and incorporate the values, norms, and standards of behaviour that the organisation considers essential and relevant for a good performance in its staff, showing the benefits to which he is entitled, as well as his responsibilities, in other words, that he wears the company's shirt.

Nowadays, authors begin to refer to coaching as an important tool for organisational socialisation. The goal of socialization coaching is to regard people as whole, complex, and interdependent systems, with each person being viewed as a "Point Out of the Curve" ever since they joined the business. By promoting the proactive movement to seek integration, coaching, as a tool for the socialization of employees in the business, expands the potential for welcoming. The challenge for organizations looking to stay competitive is to acknowledge the other as a point outside the curve without discarding it, as statistics occasionally suggest, and integrate it into the organizational environment without homogenizing it, as frequently occurs in the socialization suggested in learning trails (Rauber and Machado 2021).

### 5.1. Ways of Welcoming

The success of integration depends on the welcoming procedures developed by the organisation. The integration process consists of introducing the employee to the organisation, providing him/her with information sharing and integration into its functions. This paper will develop four forms of welcoming that can be developed by companies as Welcoming Programmes.

The world is in constant change, and in the current times, more and more companies need to develop processes so that their employees can feel more motivated and more involved with the organisation. The employee's involvement with the company starts right at the moment of recruitment. It may be said that it is during the recruitment phase that organisational socialization begins, a stage of adaptation where the company may win over the new employee. It is at this moment that the individual will start to integrate with the company culture, the function to be performed, the leadership, and his co-workers (Maanen and Schein 1977; Silva and Fossá 2013).

The first day is always the most difficult; anxiety is very present since the employee does not know what he/she will find, and it is at this moment that the welcoming process is framed to provide comfort and reduce anxiety in this first contact. Each organisation may choose to adapt or create its welcoming program. It is very common for companies to choose to pass on values such as culture, codes of ethics, mission, and values. A portion of the case study developed will be presented, then, to clarify how the process of organisational socialization can be developed in practice:

- The phase of organisational socialization occurs in two parts: The first is the responsibility of the Human Resources Department; the employee is directed to the Human Resources Department, where the welcoming and integration process is carried out; initially the welcoming process is carried out in a room; this involves getting to know the company and its hierarchical position, the delivery of clothing and personal protective equipment (PPE), the indication of the workplace, changing rooms, lockers, WC and canteen.
- Next, he is received by the hierarchical superior, who is responsible for the guided tour of the company's facilities, and encounters the presentation of the co-workers, the on-the-job training. There are various forms of organisational socialization, from

deliberate and planned practices to informal and more spontaneous practices; it is up to each organisation to choose which plan is more in line with its characteristics. The socialization process is the result of an effort from both sides: the organisation that must receive the new employee and adapts, and the employee who seeks to integrate (Silva and Fossá 2013; Maanen and Schein 1977):

**Welcome Courses:** The welcome courses consist of the initial training that helps new employees in the integration process, directly contributing to reducing stress and anxiety levels. There must be harmony between the employee, the organisation, the management, and the co-workers, transmitting clarity and security at all levels necessary for the new employee. Welcome courses develop activities that are designated by the organisation and need the participation of all employees. According to Silva and Fossá (2013); and Rego et al. (2015), the courses are related to:

- Getting to know the organisation where the individual will be inserted This involves getting to know what the surrounding spaces are, and their workplace, meal, and leisure areas.
- Passing on information about the role in the organisation; one of the most important points is communication, which should be direct and clear. The employee, by understanding what his/her role will be in the organisation, will be able to develop his/her activities following the company's objectives.
- Technical training occurs when the collaborator has direct contact with the tasks that will be performed by him/her. This training will be given by a manager or work colleague.
- Integrating into the organisational culture means including the new employee in the surrounding environment of the organisation, the beliefs, standards, values, and customs that make the organisation what it is; the organisational culture is not only defined by what the company preaches but mainly by the employees, directors and the whole surrounding society of the organisation that ends up being its mirror.
- Company spirit: It is important to be integrated into an organisation that values its employees; to be able to work within the company spirit, it is necessary to understand which are the values and the feelings that you want to pass on to the employees, so that then the feeling of belonging is created, and the company's objectives become the employee's objectives.
- Tutor: The new employee assumes high expectations about the work environment and mainly about the welcome and integration (Baker 1992). The goal of integration is to provide the best conditions for socialization, so that as soon as possible the individual feels an integral part of the organisation. We have already mentioned above some important processes for the inclusion of the new employee; the tutor phase is also a very important process. The tutor phase occurs when the practical case begins the on-the-job training process. Technical and professional knowledge will be transmitted to the new member by a tutor, who can be a boss or a colleague.

The role of the tutor is to transmit knowledge and experience during a continuous period of adaptation of the member, provide information about the organisation and the role to be performed, advise according to the situations that arise and facilitate the integration, presenting elements from the various departments (Maanen and Schein 1977; Silva and Fossá 2013). Informal programs result from the daily interactions between the new element and the other members of the organisation (Ashforth and Saks 2017). The agreement that occurs between the organisation and the new employee, both the expectations of both parties, and the actual accord, is called a psychological contract and has a very strong informal component in the whole process of reception and integration being built according to the interactions between the various members of the organisation.

## 5.2. The Onboarding Book

**Onboarding book:** The welcome process takes place through learning. The organisation intends to pass on to the new employee important aspects of its mission and values.

Facilitating the provision of crucial documents about the everyday life of an organisation and respective policies is one of the most important actions in the integration of a new employee (Cunha et al. 2016). A good way to provide these learnings is through the onboarding book, which can be part of specific socialization and integration programs developed by companies as they work as socialization tools or instruments (Bauer 2008).

This is a guide made available to new employees, and it serves as a reference, facilitating the integration into the organisation and into the professional environment to which the individual will belong. Each organisation structures its onboarding book according to its needs; it is necessary to pay attention to the type of information to be transmitted and its relevance. They are part of a wider strategy of the company to accompany newcomers to a certain firm, which can include: an onboarding book, turnaround (general visit to the enterprise's facilities to meet the heads of departments), onboarding, training, job shadowing, or even mentoring (Cardoso 2016; Rego et al. 2015; Guerreiro 2014).

The onboarding book consists of a unique document, one developed for the new employee to transmit an image as close as possible to the organisation, which aims to create the best integration conditions and a rapid identification with the organisational culture of the company (Cardoso 2016). According to Rego et al. (2020), such documents should contain information that answers the natural questions that a newcomer asks, should make him feel welcome, and should transmit some of the organisational culture's most important features (Calheiros 2019). It is aimed at providing new employees with an overview of the company, namely, its history, policies (salary, performance evaluation, promotion, diversity, health, and safety), standards of conduct, benefits, and locations of premises (Rego et al. 2020). These criteria are summarized in Table 2.

**Table 2.** Summary of welcome manual contents according to the authors.

Author	Year
Caetano & Vala	2007
<b>Suggested Contents</b>	
<ul style="list-style-type: none"> <li>-Welcome: Welcoming note, presentation of the manual and its objectives; Presentation of the Organisation: Origins, historical evolution, internal structure, mission, activity and business areas;</li> <li>-Work Relations (rights, responsibilities, working hours, holidays, leaves of absence, etc.)</li> <li>-Workers' Representative Structures: Union Delegates and Workers' Commission;</li> <li>-Social Benefits: Supplement to subsidies granted by Social Security or not;</li> <li>-Support and Social Services: Canteen, medical services, sanitary facilities, sports facilities, transport for workers, clothing and personal protective equipment, hygiene and safety services;</li> <li>-Human Resources Management Policy: Organisation and dynamics of the various professional careers and promotion systems, performance evaluation, bonuses (assiduity, merit, associated with results), training and development.</li> </ul>	
Cardoso	2016
<b>Suggested Contents</b>	
<ul style="list-style-type: none"> <li>-Welcoming note (of the main responsible of the enterprise);</li> <li>-Administrative procedures;</li> <li>-Presentation of the organisation (e.g., history, mission, vision, strategic goals, values, horizontal organisational competencies of all collaborators and main social and economic indicators reflecting market position);</li> <li>-Business areas: main activities, products and services;</li> <li>-Internal structure (organisational chart) identifying the department's main responsibilities and their directors;</li> <li>-Staff management policies—perspectives of professional development and evolution, performance evaluation criteria, promotion and remuneration systems (fixed and variable), social benefits (complementary social security subsidies, transport, insurance, study subsidies, canteen, among others);</li> <li>-Ethical and attitudinal principles: professional confidentiality, professional incompatibilities, and types of dress, among others;</li> <li>-Union structures;</li> <li>-General information: internal communication (use of the telephone, internet and email), hygiene and safety standards at work, and most important contacts, among others.</li> </ul>	

Table 2. Cont.

Author	Year
Calheiros	2019
<b>Suggested Contents</b>	
<ul style="list-style-type: none"> <li>-Welcoming note (of the main responsible of the enterprise);</li> <li>-General information about the organisation (History, structure, among others);</li> <li>-Main organisational policies/strategies;</li> <li>-Horizontal organisational procedures;</li> <li>-Installations Map;</li> <li>-Description of the welcoming programs;</li> <li>-Other useful information (internal contacts, transports, among others).</li> </ul>	
Rego et al.,	2020
<b>Suggested Contents</b>	
<ul style="list-style-type: none"> <li>-Welcoming note (of the main responsible official of the enterprise);</li> <li>-Organisational chart of the organisation;</li> <li>-Products and services of the organisation;</li> <li>-Factory/Department/Buildings map;</li> <li>-Key terms of the industry/organisation/function;</li> <li>-Organisations' Code of Ethics;</li> <li>-Copy of the organisational policy manual;</li> <li>-Copy of the job's description and function goals;</li> <li>-Holiday calendar;</li> <li>-Compensation plan and other benefits (insurance, medical assistance, pension plan, bonuses, among others);</li> <li>-Copies of performance appraisal documents, including dates of appraisal;</li> <li>-Copies of other relevant documents (e.g., requisition of material; reimbursement of expenses);</li> <li>-Organisational training program;</li> <li>-Information on the career plan;</li> <li>-Safety and emergency procedures;</li> <li>-Copies of the organisation's key publications;</li> <li>-Telephone directory.</li> </ul>	

Source: Own elaboration based on (Caetano and Vala 2007; Calheiros 2019; Cardoso 2016; Rego et al. 2020).

Summary of welcome manual contents according to the authors:

So, as we can conclude, looking at the suggested contents that several authors have listed over time, the onboarding book may include, in general, the following points:

- Presenting an Introduction, by the management or other responsible entity, a welcome note to the new employee for example;
- The presentation of the organisation, consisting of the history, mission vision, strategic objectives, management policies, and quantitative activity indicators;
- Presentation of the departments and/or business areas, explanation of the competencies and functions, and explanation of the competency profile of the employees;
- Ethics charter of the organisation, company, or institution, presenting the rights and duties of the employees, legislation and/or applicable regulations, working hours, remuneration and/or benefits;
- Functional details, where utilities, equipment, intranet, useful contacts, etc. are presented;
- The welcome plan consists of planning for the day when the new employee joins the team, bureaucratic procedures, filling out forms, meetings with the department heads, and guided tours of the facilities.

It is easy to see that the onboarding book facilitates the understanding of the structure, attributions, and functioning of the organisation (Pereira et al. 2020; Rego et al. 2020; Silva and Fossá 2013) and can be a precious tool to organisational socialisation, promoting integration and reducing ambiguity.

## 6. Methods

A literature review was developed concerning the main topics of research, Organisational Socialization processes, strategies, and methods, with special emphasis on the onboarding book. This was done to analyse if the onboarding handbook remains relevant in the integration and welcoming of newcomers to a company. Documentary analysis is a research method used to study written, visual, or other types of documentary evidence (Hsieh and Shannon 2005). The aim is to examine and interpret documents to gain insight and understanding about a particular subject, phenomenon, or event. This method can be applied in various fields, such as history, sociology, anthropology, and political science. The process of documentary analysis involves selecting and collecting relevant documents, coding and categorizing the data, and using the data to answer research questions and make inferences (Lawson 2018). The validity of the findings obtained through documentary analysis depends on factors such as the authenticity and reliability of the documents and the researcher's ability to interpret and analyse the data accurately. The contribution of the paper is two-fold: (a) to present a revised and updated structure for a welcome manual and (b) to confront this structure with real welcome manuals of several enterprises of different sectors. A purposive sample (Robinson 2014) was chosen to examine eight onboarding handbooks and content analysis (Hsieh and Shannon 2005) was used to verify if the contents matched the proposed revised and updated structure of an onboarding book/welcome manual. A summary table, Table 3, is presented in the next section.

**Table 3.** Checklist of the criteria to analyse in the chosen Onboarding Books.

Welcome Manual	Introduction (e.g., Welcome Note)	Criteria Checking							Presentation of the Different Departments/Business Areas
		Presentation of the Organisation							
		History	Mission	Vision	Values	Strategic Goals	Management Policies	Others	
1 Ombria Resort	Welcoming message from the Board and presentation of the manual and its goals	Present	Present	Present	Present	Present	Present	Logo explanation, Environmental policies, General information about Facilities location and description, Working hours, Human Resources,	Organisational Chart present
2 Grupo Vila Galé Hotéis	Welcoming message from the CEO	Present	Present	Present	Present	Present	Missing	Main Partner Stakeholders and Partner Brands	No organizacional Chart. Presence of tables identifying Hotels of the group and names of heads of departments and persons in charge of other services
3 Ribadão S.A.—Indústria de Madeiras	The welcome message is missing Presence of the manual's explanation and its objectives	Present	Present	Present	Present	Present	Present	First day what to do list; presentation of produced products and factory production process; Environmental policies	No organisational chart
4 CIG—Comissão para a Cidadania e Igualdade de Género	Present Explanation of the purpose of the manual	Present	Present	Missing	Missing	Missing	Missing	Description of the constituent bodies of the organisation and internal structure, HR department	Organisational Chart present
5 Eco Ambiente	Missing	Present	Present	Missing	Missing	Missing	Present	Quality, Environment and Safety Policy	Organisational Chart present
6 ASCUDT—Associação Sócio-cultural dos deficientes de Trás-os -Montes	Present	Present	Present	Present	Present	Present	Present	Annual Plan and other strategies	General and Functional Organisational Chart Present



Table 3. Cont.

		Criteria Checking							
Welcome Manual	Introduction (e.g., Welcome Note)	Presentation of the Organisation							Presentation of the Different Departments/Business Areas
		History	Mission	Vision	Values	Strategic Goals	Management Policies	Others	
7 IPCV—Inst. Politécnico de Viana do Castelo	Present Explanation of the purpose of the manual	Present	Present	Present	Present	Present	Present	Strategic plan for 2020–2024	Organisational Chart Present
8 DHM Discovery Hotel Management	Present	Present	Present	Present	Present	Present	Present	Onboarding Program Turnaround procedure, mentoring, the organisational culture of the enterprise Description of responsible for the staff, head of departments in the hotels of the group	Organisational Chart Present
		Criteria Checking							
Welcome Manual	Ethics Charter								
	Rights and Obligations of the Employee	Applicable Legislation and/or Regulations	Working Hours	Wages and Other Benefits	Others				
1 Ombria Resort	Present	Present (work legislation)	Present	Present (Wages, paid Vacations)	General employee absences in case of death of a relative and motherhood leaves; health and safety in the workplace, hygiene policies, safety rules, how to proceed in case of robbery, fire; performance evaluation procedure; taining programs, recruitment and selection of new staff, internship programs, disciplinary proceedings, cessation of contract, existence of an ethics code in the workplace				
2 Grupo Vila Galé Hotéis	Present	Work regulations present without any specific legislation	Present	Present (Prizes of Productivity, Staff Meals, Occupational Healthcare)	Personal image and care of the uniforms, time registration, locker rooms, training programs, performance evaluation procedure, dos and don'ts work list, preventive care list, fire procedures, health and safety in the workplace, incentive family staff program				

Table 3. Cont.

Welcome Manual	Criteria Checking				
	Rights and Obligations of the Employee	Applicable Legislation and/or Regulations	Working Hours	Ethics Charter	Others
3 Ribadão S.A.—Indústria de Madeiras	Present	No reference to company agreements or collective labour agreements	Present	Christmas and holiday pay, Parental Leave, Holiday and vacations, Hour bank	Behavioural attitudes inside and outside the organisation; health and safety at work, medicine at work, tidiness, posture, use of personal protective equipment, policy on the use of alcohol and drugs, types of harassment in the workplace, harassment, bullying and sexual harassment, training program
4 CIG—Comissão para a Cidadania e Igualdade de Género	Missing	General naming of Work laws,	Present	Missing	Monitoring and recording of assiduity, absences and their justification process, job description
5 Eco Ambiente	Present	Missing	Present	Retribution Lunch, Christmas and holiday allowances	Performance of professional activity, professional qualification, absences, accidents at work, occupational medicine, health and safety at work, alcohol regulation, risk prevention, environment other duties, disciplinary procedures
6 ASCUDT—Associação Sócio-cultural dos deficientes de Trás-os -Montes	Present	Present	Present	Present	Ethical culture, confidentiality, welcome and integration programmes (facilities, hours, legislation, attendance record, lateness, breaks and breaks, uniforms, meals, absences, holidays, overtime, human resources, recruitment, selection and induction of new employees, volunteering, curricular and professional internships, remuneration, professional career, performance evaluation, professional training, behaviour, mistreatment or negligence, involvement and participation forms and activities, hygiene and safety at work, occupational health and emergency plan)
7 IPCV—Inst. Politécnico de Viana do Castelo	Present	Quality norms designation	Missing	Missing	Link to ethics code, HR department, health and safety work norms
8 DHM Hotel Management	Missing	Missing	Present	Missing	General description of the onboarding steps throughout the first month

Table 3. Cont.

Welcome Manual	Criteria Checking				Reception Plan That the Organisation Follows
	Useful Contacts	Utilities	Equipments	Others	
1 Ombria Resort	Missing	Description of IT system and Internet use in the facilities	Present	Characterization of the hotel by number and typologies of rooms, products, main and ancillary services	Present
2 Grupo Vila Galé Hotéis	Missing	Description of rooms services and ancillary services	Present (simple description of facilities and of the hotels)	Characterization of the several hotels of the group and key partners and key brands	Missing
3 Ribadão S.A.—Indústria de Madeiras	Missing	Present	Present	First aid kit	Missing
4 CIG—Comissão para a Cidadania e Igualdade de Género	Links to main government websites connected to the nature of the organisation	Missing	Missing	N.A.	Missing
5 Eco Ambiente	Present	Missing	Missing	N.A.	Missing
6 ASCUDT—Associação Sócio-cultural dos deficientes de Trás-os-Montes	Present	Missing	Missing	N.A.	Present
7 IPCV—Inst. Politécnico de Viana do Castelo	Present	Description of Facilities	Missing	Characterisation of secondary services, canteen, bar and other contacts	Present
8 DHM Hotel Management	Present	Present	Present	Description of the main services of the hotel's chain	Present

Source: Own elaboration based on the suggested contents of onboarding books of [Caetano and Vala \(2007\)](#); [Calheiros \(2019\)](#); [Cardoso \(2016\)](#) and [Rego et al. \(2020\)](#).

## 7. Results and Discussion

As the authors try to show, an onboarding handbook is a powerful tool for the integration of new employers, facilitating the work of HR. In the eight examples presented here, the structure displayed follows what the key and updated bibliography listed above asserts an onboarding book should have. With this section, the reader has a complete introduction related to the company and its internal organisation. This shows the primary goal of this kind of manual, which is to present the organisation and accelerate the onboarding process for the new employee.

As we can see by our checklist, all eight of the onboarding books have present, in the dimension “Presentation of the Organisation”, both history and mission, as suggested by authors like [Caetano and Vala \(2007\)](#) or [Cardoso \(2016\)](#), but in terms of vision and values, several onboarding handbooks fail to present it; as well, management policies are missing in two of them, contrary to the course indicated by [Calheiros \(2019\)](#), which suggested that such policies are an important item in onboarding handbooks.

Among the eight onboarding handbooks analysed, only one doesn't present an organisational chart, although one of them has a chart with only the names of heads of department and not a complete chart. But, in general, the organisational chart seems to be a clearly important part, as suggested by several authors, e.g., ([Arménio Rego et al. 2015](#)). Strategic goals are also present in almost every onboarding handbook analysed. In general, regarding this dimension, most of criteria indicate that, more and more, organisations are strategic, and recognise the importance of giving this kind of information to newcomers, so that individual goals can be aligned with organisational ones. This kind of mindset represents a step forward for many management styles, most traditional, that didn't enhance a strategic approach.

In the Ethics Charter dimension, the onboarding handbooks are much more heterogeneous. Regarding the rights and obligations of the employee, they are present in almost every handbook, but in two of them are missing. The other items, such as applicable legislation and/or regulations, working hours and, wages and other benefits, are present in the majority of the analysed onboarding handbooks, but not in every one, which seems inconsistent with what authors have indicated and it can weaken the importance of this tool, since this type of information is very sought after over time by new employees who do not yet have all this panoply of much-needed data. If, in the analysed manuals, the strategic part seems quite complete, this part seems more dispersed, which may indicate the use of another type of vehicle to make this part of the information available. According to authors in the area, the aggregation of information in the onboarding handbook is an obvious advantage because dispersion leads to more uncertainty and ambiguity ([Arménio Rego et al. 2015](#); [Calheiros 2019](#)).

Moreover, as we can see in this paper, the onboarding book maintains its importance to the authors of the Human Resources Management area, as it continues to be studied and presented as an important tool for HR practices nowadays. With our study it was possible to verify that any company, regardless of its size, can present a quality and complete onboarding manual, as stated by the authors of reference. The manuals analysed mentioned most of the dimensions that were intended to be verified, although some companies were clearer than others in the drafting of the manual. The onboarding book is one of the most important guiding documents in organisations, and it should follow some criteria defined by several authors so that essential information is always conveyed to new employees. With the present study we aim to have contributed to a better understanding of the importance of this tool, as well as to clarifying the most relevant aspects to take into account when creating an onboarding handbook.

In general, we can see that the structure of the onboarding handbooks doesn't depend on the sector, because all of them seem to respect, in general, the suggested contents that authors refer to. The differences between them seem to be much more related to the care taken to do the handbook, or even the approach that the organisation wants to use in developing it. The analysis of both public and private organisations' onboarding books

showed that public sector is now trying to mimic the private sector as the New Public Management reform progresses, and we can see that public organisations try to build a business-like organizational identity (Skålén 2004) creating diversified, contradictory, and changeable identities rather than the uniform, stable and bureaucratic ones that public sector used to have (Skålén 2004), and for that matter, the contents of the onboarding books are, now, more and more similar. This finding reinforces the belief that some of the core concepts have improved the organization or delivery of public service across a variety of organizational settings (Dan and Pollitt 2015).

## 8. Conclusions and Limitations

In conclusion, it is safe to admit that the onboarding handbook remains as topical today as ever, if not more so. The importance of attracting and retaining talent is now crucial for organisational sustainability and all tools that can facilitate this are important. Book onboarding is clearly one of them, as it reduces ambiguity and brings some decrease in anxiety in the first moments of contact between new members and organisations. This book is a guide made available to new employees and serves as a reference, facilitating integration into the organisation and the professional environment to which the individual will belong. Each organisation structures its onboarding handbook according to its needs, paying attention to the type of information to be transmitted and its relevance.

As the indirect costs of recruitment and selection can be higher than the direct costs of the process, the onboarding process is instrumental to reduce these costs, because we know that if the integration goes well, we have a higher probability to decrease turnover and consequently also reduce costs and increase productivity, and for sure in this organisational socialization the onboarding book plays a central role as a means to disseminate culture, transmit mission, vision and organisational values and communicate internal policies such as HR and safety policies, which are so important for new members to feel adjusted.

As with any other research, we have encountered limitations, especially concerning to the difficulty of some organisations in share their internal instruments, as the onboarding handbook, mainly linked to the eternal dogma that “information is power”, while we strongly believe that power comes from knowing what to do with information and sharing knowledge.

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