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Understanding the Importance of Onboarding at a Large, Research-Intensive University in Western Canada

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Understanding the Importance of Onboarding at a Large, Research-Intensive University

in Western Canada

by

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Abstract

Onboarding programs are understood as fundamental training required by a new employee to successfully integrate into an organization and their role. Onboarding programs have been shown to contribute to employee effectiveness and can influence worker retention and impact organizational culture. Yet while onboarding has such a strong impact on many significant factors within an organization, many companies view onboarding as an inconsequential portion of a new employee's welcome into the institution.

In this research study, I engaged in a qualitative, single instrumental case study, collecting onboarding information from a large, research-intensive university in western Canada. This study was guided by one research question: Do current onboarding processes at a large, research-intensive western Canadian university provide unionized administrative and professional staff with the knowledge and skills needed to successfully integrate into the university environment and their new role?

The data collection involved semi-structured interviews with nine unionized administrative and professional staff who had worked at the university for one year or less. Research findings highlight some alignment to relevant and contemporary topics as identified within the literature, understood as best practices to ensuring successful onboarding, including pre-onboarding and organizational socialization, while also emphasizing gaps within the process, specifically around interpersonal socialization and organizational culture.

Keywords: Onboarding, pre-onboarding, human resources, organizational culture, socialization, Four C's of onboarding, training and development, professional development, experiential learning, adult learning

Preface

This thesis is original, unpublished, independent work by the author, Andrew Mardjetko.

The study, "Understanding the Importance of Onboarding at a Large Research-Intensive

University in Western Canada," was approved by the University of Calgary Conjoint Faculties

Research Ethics Board on December 10, 2019 (REB19-1899).

This thesis has been professionally copyedited.

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This has been one of the most rewarding and reflective times in my life. I feel like I have been so many different people throughout this journey, yet the person who started and the person who finishes are not different people, but someone who has found his confidence and voice.

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Dedication

I would like to dedicate this dissertation to my dear friend Abi Cherinet, who encouraged me to apply for my Doctor of Education degree and decided to join me on this journey. My dear friend, I still remember that day all those years ago when we stood back and chatted about celery. Who would have thought that this would be the outcome?

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Definition of Terms

The table below represents terms commonly used within the discussion of onboarding. These generalized definitions provide conversational descriptions of the terms, representing an everyday understanding. This dissertation will further explore these terms within the scope and discussion of the literature, research findings, and data analysis.

Table 1

Definition of Terms

Term	Definition
Onboarding	A multipurpose term that encompasses the various steps needed to integrate a new employee into an organization. Special attention should be given to specific elements, such as acculturation to organizational culture, integration and development of interpersonal and institutional socialization, and consideration around retention and career growth (Graybill et al., 2013; Bauer, 2013b).
Employee Life Cycle	A multi-stage cycle that outlines the various benchmarks and processes, such as onboarding, annual review conversations, and training and development, that an employee performs throughout their time with an organization (Welty, 2009).
Retention	Career development and growth within an organization. This can take many forms, including career progress, skill and knowledge growth, or transition to other areas within the same organization (Morgan et al., 2020).
Socialization	Recognized in two ways: As the interpersonal relationships a new employee develops within a new organization, among colleagues; and as an understanding of the various norms, customs, and practices operating within an organization (Graybill et al., 2013; Klein et al., 2015).

Organizational Culture	The vision and values of an organization, and the way in which the organization achieves these goals. Organizational culture can shift, and change based on many relevant factors, including staffing, government policy, or societal norms (Maksymiuk, 2017; Cochran, 2022).

CHAPTER 1: Introduction

Overview

In this chapter, I begin my exploration into onboarding in a large, research-intensive university in western Canada, outlining the background and context of this study, the research focus and questions, the significance of the research, my own positionality as a researcher, and the assumptions that influenced this study.

Background and Context

Employee recruitment is an expensive process that can cost an organization up to three times the annual salary for a specific position (Bauer, 2013a). This is due primarily to particular functions connected to the recruitment process, such as marketing, promotion, and interview costs (Bauer, 2013a). With such a substantive cost to an organization, it is very important that a new employee be able to successfully navigate a new workplace and function effectively in their role as quickly as possible upon arrival (Dunn & Jasinski, 2009), and that they feel engaged and connected and inclined to stay. In this way, the process of onboarding becomes an important element in helping a new employee become a fully functioning and established member of the organization (Klein, et al., 2015).

There is no one authoritative definition that fully describes the onboarding process. Through the exploration of various literature related to onboarding, the following definition was compiled using key elements from different authors. The intent of creating a conceptual definition was to highlight the multifaceted and dynamic nature of onboarding within an organizational framework, and illustrate the diverse responsibilities onboarding generates within an organization. The definition below is not considered all-encompassing and is mainly

concerned with the development of a personal working understanding of onboarding and how it relates to the successful integration of an employee within an organization.

Onboarding may be understood as an "integration program that equips new hires with the resources to become fully engaged and culturally aware members of a productive workforce" (Hillman, 2010, p. 1). Onboarding can also be understood as assimilation, organizational entry, or employee socialization – a process in which a new employee is introduced to the mission, vision, and values of an organization (Graybill et al., 2013). Further, "[a] robust onboarding process represents a key milestone in the employee journey" (Krasman, 2015, p. 9) which provides an understanding of "why they need to know something before beginning to learn" (Harder et al., 2016, p. 45). The onboarding process begins well before an employee commences employment in an organization and can continue for several months (Gesme, 2018). An effective new employee onboarding program emphasizes the importance of addressing onboarding in support of employees becoming "productive as quickly as possible" (Bauer, 2013b, p. 2). Additionally, onboarding is a holistic approach that brings people and processes together in an attempt to maximize a new hire's impact within the organization (D'Aurizio, 2007). This conceptual definition highlights the many different functions of onboarding in the entry and integration of a new employee, and the important role it plays within training and development in an organization.

"Clarity around job importance, organisational vision, and objectives and responsibilities" (Edwards, 2009, para 3) significantly impact how individuals understand and relate to expectations pertaining to a new role. In particular, this clarity deepens the understanding of expected behaviours within the organization. As I reflected on my research topic, I pondered, in light of the importance that onboarding has for new employees, do current

onboarding processes at my university provide unionized administrative and professional staff the knowledge and skills needed to successfully integrate into the university environment and their new role?

Recruitment brings new hires into an organization. How the organization manages processes such as onboarding, however, influences the long-term relationship between the applicant and the organization (Friedman, 2006). Therefore, it is critical that provisions which include "support, collaboration and preparation" (Friedman, 2006, p. 27) are put in place to manage the new employee training process, ensuring that both the organization and the new hire get the most benefit from their employment experience.

Research suggests that an effective onboarding process leads to a happier, more productive workforce (Nobel, 2013). Having a happier and more productive workforce has been shown to influence all levels within an organization and increase customer satisfaction (Nobel, 2013). Graybill et al. (2013) explained that a good onboarding program should provide a realistic image of the environment an employee will work in, with an emphasis on developing a foundation on which certain elements, such as communication, should be based. Ultimately, for Graybill et al. (2013), "[a]n effective onboarding program should give new employees the tools and support needed to succeed" (p. 202).

Again, these views show that onboarding is comprised of certain critical elements that can have a significant impact on the success of a new employee within an organization. As I reflected on my research topic, I pondered, in light of the importance that onboarding has for new employees, do current onboarding processes at my university provide unionized professional and administrative staff with the knowledge and skills needed to successfully integrate into the university environment and their new role?

The university where I am employed is a large research university, one of the largest employers in the city of Calgary, with nearly 5,000 academic and non-academic staff members across various faculties and units (University of Calgary, n.d.b). The university's size and diverse organizational nature allow individuals from many different backgrounds and employment sectors to integrate their skills successfully into the greater university environment, helping to cultivate a climate that promotes growth, development, and a keen balance between work and life (University of Calgary, 2019b). The university incorporates diversity as a central tenet within the hiring process and encourages the inclusion of a diverse workforce as a method of enhancing knowledge, skills, and organizational culture (University of Calgary, n.d.a). These factors offer important insights into the university's overarching strategies related to employment and hiring practices, and provide a rich background on which to gain an understanding of contextual factors that influence onboarding, and research on onboarding, within the university.

A number of important elements exist within the university structure that lend themselves to research and analysis of the university as an employer, with specific focus on the onboarding process. The university has well-established onboarding practices, designed to assist new employees to navigate and successfully integrate into the greater campus environment (University of Calgary, 2019b). This includes web pages with a large repository of existing onboarding materials, such as checklists, key documents, and other relevant information (navigation of institutional systems and procedures, for example), that a new employee must learn in order to be a successful and productive member of the greater university community (University of Calgary, 2019b). The existence of well-established practices and documentation makes research and analysis of onboarding at the university particularly relevant, providing a distinct advantage for identifying the specific goals and recognizing the outcomes of onboarding

at the university. This provided an excellent starting point on which to ground this research. The ability to understand organizational onboarding objectives, and recognize measures for success, provided critical context for the research and analysis of the university's onboarding methods. This context helped in developing a detailed research focus that looked to understand the university's onboarding practices and identify their alignment to contemporary practices within the onboarding literature. Conducting research on practices already in existence and identifying alignment to best practices identified within the onboarding literature, has deepened my understanding of onboarding processes for new employees and their value for new employees and for organizations.

Research Focus

My research derives broadly from an interest in onboarding practices, and specifically from the recognition that onboarding practices have a significant impact on both a new employee and an organization (Nobel, 2013). This relationship is important in that a correlation can be established between an effective onboarding program and the success of a new employee within their role (Graybill et al., 2013).

From a broad interest in the impact of onboarding practices for employers and new employees, the primary focus of this research is to compare current onboarding practices as described within the literature on onboarding, with practices at the large, research-intensive university where I currently work. This focus allowed for clarity on current onboarding practices within the University and their alignment with the relevant and contemporary topics as explored with literature. The secondary focus of the research is to explore the successes and limitations of current onboarding practices within the university, in the context of best practices gleaned from the literature. Are there specific practices at the university that are not currently considered best

practices? What are the implications of these practices for the onboarding process at the university?

Research Questions

This research was guided by one primary research question and two sub-questions. The primary research question that informed this research is:

Do current onboarding processes at a large, research-intensive western Canadian university provide unionized administrative and professional staff with the knowledge and skills needed to successfully integrate into the university environment and their new role?

Secondary research questions include:

a. How are onboarding processes designed and experienced within this work context?

b. What resources, supports, and processes impact an individual's integration into their role and the university environment?

These questions highlight important elements of this study, and provided a foundational path to direct the research and inform the research methodology and data collection method.

Significance of Research

My aim is to deepen practitioners' understanding of onboarding processes and their impact on new employees. Exploration of existing onboarding practices at the university and their alignment with the body of knowledge on onboarding. Understanding this alignment helped to provide clarity on the overall nature of onboarding practices at the university, the benefits of specific practices, as well as gaps and limitations. Ultimately this research aims to further the discussion of onboarding practices at the university, among onboarding practitioners generally, and within the greater body of knowledge.

Researcher Positionality

Having worked in the field of adult learning for the past 12 years at two separate universities in four distinct departments, I have witnessed the benefits of training and development programs for employees within an organization. I have seen colleagues develop new skills that have given them the confidence and ability to successfully navigate workplace challenges and opportunities, and become stronger, more successful employees. For this reason, I have chosen to focus on training and development programs related to onboarding. Onboarding is one of the most crucial training and development processes a new employee can experience within an organization (Bauer, 2013b). Onboarding can greatly improve an employee's ability to successfully integrate into the workplace, and helps to build the competence needed to successfully function within their role (D'Aurizio, 2007).

I have worked at my current university for the past 9 years in three separate departments, navigating a work journey that strongly aligns with my interest in onboarding. I have had the privilege of helping new colleagues navigate their own onboarding experiences, acting as an onboarding buddy on numerous occasions. This has included providing supports, such as ordering and setting up equipment, developing and facilitating a first-week training schedule, departmental tours, and support with registration into university orientation programs. I then transitioned into a role that focused on onboarding from a teaching and learning perspective; specifically, working to support the design, development, and implementation of programs geared to helping graduate students, postdoctoral scholars, and new academics develop the skills needed to be successful facilitators. The role required understanding learning practices, becoming more aware of equity, diversity, inclusivity, and accessibility mindsets, and recognizing how to better engage with key stakeholders. As my confidence and leadership skills

developed, I was able to transition successfully into an area where I can influence onboarding more directly within my organization. My current role focuses on the design and implementation of learning and development programs geared towards the broader campus community. This includes professional development courses on leadership, equity, diversity, inclusion, and accessibility, respect in the workplace, and onboarding. Now positioned in a department and role responsible for designing and developing the university's onboarding programs, I have a unique opportunity to put into practice the new information and recommendations gleaned through my learning journey, with potential relevance for course development, amelioration of gaps and limitations, and other opportunities to enhance the current onboarding program.

Onboarding is my passion. This learning journey has been instrumental in helping me direct my passion into something that has become a central part of my life. The tools, information, and resources gained from this study have given me new perspectives on processes at my university. The knowledge I have gained has helped me to navigate a career that places me directly adjacent to onboarding at my institution and positions me well to continue advancing in a direction that will allow for continued influence on onboarding processes and practices.

Bias and Assumptions

I do hold and recognize some bias and assumptions regarding the onboarding process at the university and how this relates to my research. As a former unionized professional staff member at the university, I have my own experiences related to new employee onboarding. I am also in a unique position, having provided supports to numerous colleagues as they navigated their own onboarding processes at the university. Moreover, I was hired into a new position at the university during the same time period as the individuals in my research study.

While I was not a new employee, having already worked at the university for more than five years at that time, onboarding into my new role gave me some additional familiarity with the content and context discussed by research participants during the data collection process. Although my onboarding did not focus on university-level understanding and did not include new employee supports provided by the university, such as the onboarding checklist or new employee orientation, my onboarding did provide me with additional familiarity with some of the elements of the university's onboarding process, such as training and IT supports, as discussed in the data collection process.

These factors highlight the possibility of bias that may have occurred when conducting the interviews or engaging in the analysis of organizational data. I did, however, employ numerous measures, to be discussed later in this dissertation, to help minimize and reduce bias in the interview, data collection and analysis.

Research Design

Methodology

This study employed qualitative methodology, using a single instrumental case study to inform the research design and data collection. Case study researchers tend to focus on programs, events, or activities that involve individuals (Creswell & Guetterman, 2019). Further, a case study looks to identify one major issue or area of concern, and then identify a specific case as a means of further exploration (Creswell, 2013). A case study can yield very robust results that can be used to illustrate or illuminate the specific issue being researched (Creswell & Guetterman, 2019). This study is also informed by the inclusion of experiential learning as the theoretical framework and lens through which this research is focused.

Method

Semi-structured interviews were used for data collection. Semi-structured interviews consist of a formal interview process (typically 30 minutes in length) in which an interviewer conducts interviews with an individual or group of people (Jamshed, 2014). The interview is developed and conducted using a "topic guide," in which specific topics are discussed relating to central themes, rather than a series of prepared, pre-determined questions (Blandford et al., 2013). As a researcher, this method of conducting interviews allows freedom in permitting participants to share and navigate different elements within the central themes, without limiting thought or action (Blandford et al., 2013).

Participants

The participants in the research study were nine unionized professional and administrative employees who had worked at the university for less than one year. This limitation was chosen to help ensure uniformity of the onboarding experience among all participants across resources, documents, videos, and other onboarding items that may have been employed.

Summary

In this chapter, I explored several important factors related to my research study on onboarding processes within the university. This included consideration of the background and scope of onboarding, highlighting its important link to employee success, and the relevance of this research. Additionally, I looked at the significant elements that will guide and influence this study, including specific research questions, my positionality within the research, data analysis factors, and data analysis methodology. This was followed by a look at the research methodology

and methods that shaped this study. Overall, the goal of this chapter has been to provide a general understanding of my research into onboarding.

In Chapter 2, I explore relevant scholarly literature within the body of knowledge related to onboarding. This review of the literature helps to focus and ground my research, offering insights into specific relevant topics within onboarding as well as potential limitations.

CHAPTER 2: Review of Literature

Overview

In this chapter, I explore relevant scholarly literature on onboarding, examining the most significant topics as outlined in the literature. These topics include the pre-planning process, onboarding as a method of socialization, onboarding and the link to retention, and the Four C's of onboarding. Exploration of these topics helped to frame my research, providing the foundation for the structure of my investigation into onboarding at a large, research-intensive, western Canadian university.

Onboarding Terminology

It is important first to develop an understanding of various terms related to onboarding, to help establish a foundation for the discussion ahead. Terminology that follows draws from scholarly literature pertaining to onboarding. These are seen as working definitions, representing my own personal understanding of these terms as they relate to onboarding, based on the body of literature I have explored. Some of the terms may have different connotations or may mean different things in other contexts. For the purpose of this literature review, the terms below represent specific meanings based on my comprehension of onboarding from the perspective of the body of literature I have explored.

Onboarding

As described in Chapter 1, the term "onboarding" is dynamic, multifaceted, and contains many different elements. It has various meanings and, depending on its positioning both within the organization and in relation to a new employee, it may have multiple purposes. As this is such a fundamental and important concept to the understanding and organization of this literature review, I have chosen to reiterate some key concepts from earlier that highlight the multi-layered

and dynamic nature of onboarding. This working definition underscores different and critical elements of onboarding as explored by various authors. My hope is that readers will hold this understanding central as they navigate the various topics, terms, and limitations discussed here.

Onboarding can be understood as an "integration program that equips new hires with the resources to become fully engaged and culturally aware members of a productive workforce" (Hillman, 2010, p. 1). Onboarding can also be understood as assimilation, organizational entry, or employee socialization – a process in which a new employee is introduced to the mission, vision, and values of an organization (Graybill, et al., 2013). Further, "[a] robust onboarding process represents a key milestone in the employee journey" (Krasman, 2015, p. 9) which provides an understanding of "why they need to know something before beginning to learn" (Harder et al., 2016, p. 45). The onboarding process begins well before the employee commences employment in the organization and can continue for several months (Gesme, 2018). Bauer (2013b) emphasized the importance of onboarding in support of "making [employees] productive as quickly as possible" (p. 2). Additionally, as discussed by D'Aurizio (2007), onboarding is a holistic approach that brings people and processes together in an attempt to maximize a new hire's impact within an organization.

What this conceptual definition shows is that onboarding is a dynamic, multi-faceted process that has multiple functions. There is no one right way to conduct an onboarding program. The program itself will be dynamic and based on the needs of the organization, the position, and the incoming individual. The outcomes of the onboarding process will be different for each organization and each individual based on their own knowledge, skill, and understanding. Within this literature review, the view is that onboarding is a dynamic and changing process that has

different meanings based on context and desired outcomes. This working definition has helped me to remain agile throughout this research.

Socialization

Although there are many definitions for the term "socialization" as it relates to onboarding, the most relevant, based on my understanding, is "new employees acquiring the necessary knowledge, skills, and behaviors to fit in with a company" (Baldwin, 2016, p. 26). A key term within this definition is the idea of fit. This suggests there is some form of intangibility that a new employee must navigate in order to develop an appropriate alignment within an organization (Bauer et al., 2012). Socialization also speaks to an employee's ability to recognize the necessary knowledge and skills that will be needed within the organization (Klein et al., 2015). In this way, socialization can be viewed as a complex process in which an employee must successfully navigate towards the goal of fitting in within an organization.

Employee Life Cycle

The employee life cycle as described by Welty (2009) consists of 12 elements. These 12 elements include "advertising the position, recruiting, selection, hiring, new employee orientation, probation, training and development, performance review, promotion, coaching and disciplining, separation, benefit entitlements" (Welty, 2009, p. 83). The author emphasizes that the life cycle is dynamic and viewed from two different perspectives – the employee and the organization (Welty 2009). At times this can create friction, as each may see the employee as being at different points within the employee life cycle, but it can also have numerous benefits to both the employee and the organization by creating a symbiotic relationship in which each has the ability to influence the other. Overall, what is important to note about the employee life cycle

is that it is a multi-step cycle in which an employee slowly develops their skills, knowledge, and abilities over the course of their career.

This exploration of key definitions provided me with a better sense of how to approach and understand specific relevant topics within the literature. Since onboarding is such a dynamic concept, with shifting meaning and various connotations, it became important to be attentive to its multiple meanings while exploring the various topics. Recognizing that onboarding is multi-faceted and agile, that socialization is about establishing fit as well as knowledge and skill acquisition, and that the employee life cycle is a multi-step process of development, provides further context for my analysis and perspectives on the topics of this inquiry. This is beneficial in that it ensured all specific concepts and ideas were seen from a particular viewpoint. Since onboarding is such a dynamic concept that has shifting meaning and various connotations, it was important to recognize its different meanings while exploring the various topics.

Adult Learning

My exploration into the various literatures on onboarding begins with the concept of adult learning and the adult learning process. As the discussion above shows, onboarding is a difficult term to define. Alongside its multiple meanings and elements, though, onboarding fundamentally focuses on learning (Bauer, 2013b). The main purpose of onboarding is to help new employees learn the fundamental knowledge and skills needed to be successful within their organization and their role. For this reason, prior to exploring the literature on onboarding, I must offer the reader an understanding of adult learning theory and how adults learn. I begin with an exploration of Malcolm Knowles' concept of andragogy, and then explore social learning theory. Using Knowles' concept as a foundation, and social learning as an additional lens I will then investigate experiential learning theory developed by Kolb as a way of understanding the

"internal cognitive process" (McLeod, 2017) of a new employee. This discussion will be important to frame the critical role adult learning has within the onboarding process.

Andragogy

Andragogy in its initial conception was purported to be a learning theory, designed, and explained by Knowles (1973) as an exploration into adult learning. Based on consensus emerging from further discussion and exploration, however, it is now widely agreed that "[a]ndragogy does not perform any of the functions of a learning theory in terms of explaining how and why people learn" (St. Clair, 2002, p. 2). For the purpose of this examination, I consider andragogy as a guiding principle to help inform the discussion of how adults learn.

Andragogy, as described by Malcolm Knowles (1973), can be understood as a differentiation in assumptions about learners. Principles detailed in andragogy offer an explanation of how adult learning differs from the classical understanding of learning known as pedagogy. Pedagogical theory holds that "students will simply learn what they have been told" (McGrath, 2009, p. 100). It assumes that students have no previous knowledge in a particular area (McGrath, 2009, p. 101) and, therefore, are dependent on the teacher to support their learning. For Knowles (1973), andragogy looks to explain the observation that "while there may be similarities between adults and children in how they learn (such as language, interaction and communication), many writers argue that adult learners are different from child learners in a number of ways" (McGrath, 2009, p. 99).

Knowles (1973) explained that andragogy is based on four assumptions that differentiate andragogy from pedagogy, reflecting key differences between adults and children. In later years Knowles revisited these four assumptions and included two additional assumptions one in 1984

and another in 1990 that further expand on the principles of how adults learn (Knowles, et al., 2020).

The first assumption, "the need to know" explores the idea that adults need to know the reasoning for undertaking learning prior to beginning the learning experience (Knowles, et al., 2020). This recognizes that adults want to understand the potential benefits of taking a learning experience and also the potential ramifications of not engaging in the learning experience (Knowles, et al., 2020; Ferreira et al., 2018).

In Knowles' (1973) second assumption, "changes in self-concept," he developed the idea that as individuals grow and mature, their self-concept or ability for self-direction based on experiences and reactions begins to form. Under this assumption, learning must evolve to account for this evolving identity.

Building on the second assumption, Knowles (1973) discussed his third, "the role of experience." Under this assumption, the learner has "experience accumulated over a lifetime" and is able to apply "this 'experience' in the classroom" (McGrath, 2009, p. 103), providing a rich resource for learning. Learning activities should be designed to take these experiences into account, changing learning from presentations and reading into a more interactive experience including discussions, simulations, and field experiences (Knowles, 1973).

The fourth assumption, "readiness to learn," focuses on the observation that while children learn what they *ought* to know, adults learn what they *need* to know (Knowles, 1973). In this way learning experiences must be timed to reflect relevant "developmental tasks" (Knowles, 1973).

The fifth assumption, "orientation to learning," understands learning for adults as largely problem-centric, with adults acquiring knowledge today that can be put into immediate practice

to help support a current life issue (Knowles, 1973). This assumption underscores the significance of why an individual has entered a learning environment and how their objectives may influence the learning environment both from a curricular and learner view (Knowles, 1973).

The sixth assumption, "motivation" recognizes that adults are "responsive to some external motivators" (Knowles et al., 2020, p. 68) such as promotion, higher salary, social recognition, among others as stimulus for learning (Knowles et al., 2020; Ferreira et al., 2018). Knowles also noted that internal pressures such as increased self esteem and quality of life were more powerful motivational factors and have the ability to push the learner to increased commitment and achievement (Knowles et al., 2020; Ferreira et al., 2018).

What these six assumptions illustrate is the differing nature of adult learning from that of traditional pedagogy. While andragogy is one of the most well-known guiding principles related to adult learning theory, there has been a great deal of debate about andragogy and its explanation of how adults learn.

The role of the learner within the learning process is a key concept in andragogy and its explanation of how adults learn. Andragogy focuses on the learner providing input and shaping their own learning journey, reflecting their specific learning needs (Rachal, 2002). Although Knowles (1973) highlights this as an important distinction in the role adults play within the learning process, in practice within adult learning this is not necessarily accurate (Rachal, 2002). Much of adult learning is still a structured process that contains specific, pre-determined outcomes and various learning objectives (Rachal, 2002). Knowles' perspectives in many ways get caught up in the idea of individualization and self-directed learning at the loss of transformation and conformity (Henschke, 2008). In this way, while structured adult learning

opportunities can provide options for learners to shape their learning journey to align to their own needs, the specific curriculum and objectives of the learning are still pre-determined and are not structurally modified for each specific learner.

Another element of debate within the discussion of andragogy relates to the classification of the adult learner. Much of the discussion around andragogy surrounds the distinct role of adults within the learning journey (Knowles, 1973). Andragogy looks to capitalize on the self-concept of adults, their motivation, as well as their pre-existing knowledge as a way to enhance and shape the learning environment (Knowles, 1973). There is, however, debate as to what constitutes an adult learner. Some andragogical principles have been applied successfully in college settings and even in some primary school educational settings (St. Clair, 2002). Although in these instances the educational setting and the type of andragogical principles could be classified as highly specialized to meet the specific needs of learners, debate continues as to whether andragogy is exclusive to adult learning (St. Clair, 2002).

The cultural perspective of andragogy is another consideration. Andragogy as explored by Knowles focuses on western thinking (Singh, 2022). Using andragogy as a learning perspective can vary based on numerous cultural and societal factors (Roessger, et al., 2022). A contemporary view of andragogy highlights that those whose cultural preferences most align with western American cultural similarities are most likely to use andragogy as a method of adult learning (Roessger, et al., 2022). Other cultures, specifically those in developing nations, tend to focus on "more instrumental ways of learning" (Roessger, et al., 2022, p. 31), as a learning style that more closely addresses their current socio-economic realities and the focus of their primary needs (Roessger, et al., 2022).

This discussion of andragogy highlights adult learning as a reflective experience that utilizes the knowledge of the learner (Knowles, 1973). This prior knowledge underpins the creation of supplementary interactive learning experiences that integrate additional learning elements, such as discussions or simulations, into the learning curriculum (Knowles, 1973). Regardless of whether andragogy is specific to adult learning, its explanation of how adults learn works well within an onboarding framework. In onboarding it is important to recognize foundational understandings on which new learning can be based, enabling new employees to identify and align past experiences and existing skills with new situations and tasks (Stanley, 2012).

Social Learning Theory

Recognizing that andragogy is a guiding principle in adult learning, I wanted to explore an additional perspective around adult learning through the lens of social learning theory. This helps to provide further understanding and underscore the significant role adult learning has within the broader discussion of onboarding. Social learning theory was selected as an additional lens in which to further the understanding of adult learning, as it has strong links to many of the foundational principles of onboarding.

Social learning theory can be understood as new patters of behaviour "acquired through direct experience or by observing the behavior in others" (Bandura, 1971, p. 3). This recognizes that learning occurs and is influenced by social norms and social context (Reed et al., 2010). The idea is that when group learning occurs, there is a process of exchange in which underlying experiences help to develop, shape and create shared meaning (Khushk et al., 2023). This initial conceptualization of social learning has been viewed as having limitations as "most learning takes place in a social context" (Reed et al., 2010, p. 3) and it can therefore be hard to measure

the true effect of a social experience on successful learning. Building on this limitation is the perception that participation in a common learning experience is classified as social learning (Reed et al., 2010). This perception tends to view social learning as requiring social interaction and group engagement and does not account for the various other ways in which individuals can collaborate within the classroom environment (Reed et al., 2010). However regardless of these limitations, much of the consensus around social learning indicates that group learning experiences are much more successful than individual learning experiences (Khushk et al., 2023).

Using social learning theory as an additional lens in which to both understand adult learning and frame the literature on onboarding helps to provide further contextualization into the important role onboarding has for a new employee within an organization. Social learning theory highlights ways in which individuals may acquire further understanding of observed behaviours (Bandura, 1971), and also recognizes ways in which to develop and make meaning through shared experiences (Khushk et al., 2023).

Experiential Learning Theory

Building on andragogy and its conception of how adults learn, and social learning theory and how adults make meaning through interaction and engagement experiential learning theory developed by Kolb in 1984 looks to explore the "learner's internal cognitive process" (McLeod, 2017). It is a "holistic theory that defines learning as the major process of human adaptation involving the whole person" (Kolb & Kolb, 2017, p. 11). The theory consists of two levels, a four-stage cycle of learning, and four separate learning styles (McLeod, 2017). For the purposes of this discussion, I will be focusing on the four-stage cycle of learning.

For Kolb, "[t]he most important aspect of the learning cycle is that it describes the learning process as a recursive circle or spiral as opposed to the linear, traditional information transmission model of learning used in most education" (Kolb & Kolb, 2017, p. 15). Kolb's four stages of learning begin with a concrete scenario in which a learner has an initial learning experience (McLeod, 2017). This is followed by reflective observation, in which the learner reviews and reflects on their initial experience (Learning Theories, 2017). Then the learner progresses to the stage of abstract conceptualization, in which the learner, based on their reflection on the initial learning experience, learns from the experience, developing a sense of how they will go about replicating the initial experience. Abstract conceptualization is generally understood as the stage within the cycle where learning has taken place (McLeod, 2017). Finally, the learning progresses to the stage of active experimentation, where the learner begins to plan and try out what they have learned (Learning Theories, 2017). Once a learner has successfully navigated through the four stages of the cycle, effective learning is said to have occurred and the learner may begin to move through the cycle again.

One critique of experiential learning theory, specifically related to adult learning, is the process of engaging in the learning cycle. Sălăvăstru (2014), for example, questions whether adults need to complete the whole experiential learning cycle, or can opt for a partial approach depending on the type of knowledge they wish to gain (p. 550). To address this critique, Kolb's learning cycle needs to be understood as a "continuous spiral line" (Sălăvăstru, 2014, p. 550). A view of the learning cycle as continuous allows the learner to enter the learning cycle at different stages depending on previous knowledge and experience, and takes into account the willingness and need of the learner to address specific learning deficits (Sălăvăstru, 2014).

With this background in adult and experiential learning theory, the focus shifts to an exploration of relevant topics within the body of knowledge on onboarding. As previously noted, the topics identified are the concepts that were most prevalent in the literature. These concepts represent important elements within the onboarding process and each in their own way can be viewed as critical to the success of a new employee onboarding program.

The Pre-Planning Process

One clear and identifiable concept that emerges when exploring the relevant literature and topics, relates to the importance of pre-planning in the onboarding process. This pre-planning stage can be further divided into two subcategories. In the first section below, I look at the recruitment process, which may be understood as the elements designed for the organization to engage in the hiring process. This stage includes factors that help an organization define the goal of a job posting and better align the needs of the organization with those of the potential hire, essentially beginning the onboarding process (Hillman, 2010). From this discussion, I move on to the second subcategory related to pre-onboarding. This section focuses on the fundamentals that organizations need to engage in with a new employee prior to their official start with the organization. This sub-category recognizes that onboarding can be delineated in multiple ways and that there are certain fundamental components that must be accomplished prior to a new employee's first day (Welty, 2009).

Recruitment Process

A well-organized company will begin their onboarding process prior to a new employee ever setting foot in the organization, meaning onboarding starts during the initial recruitment process. Recruitment may occur for a number of reasons, including retirement, replacing those who have chosen to leave the organization or those who have received promotion, or increasing

the workforce (Rodeghero et al., 2021). Welty (2009) discussed orientation as being a "crucial element in the employee lifecycle" (p. 83). For Welty (2009), the employee life cycle consists of twelve distinct phases, four of which take place prior to the employee's arrival: advertising for the position, recruitment, selection, and hiring (p. 83). It is important to consider both employer and employee perspectives for each factor when looking at the employee life cycle as it relates to onboarding. Recruitment and advertising, for example, are very different from the perspective of the employer than from that of the potential new hire (Welty, 2009). In this way, the recruitment process requires the organization to reflect on the job posting and the potential hire from multiple perspectives to better understand how they can engage the best employee who will help the organization to develop an appropriate onboarding process to meet the needs of the position.

Building on Welty's (2009) ideas, Hillman (2010) discussed the importance of developing a job profile that correctly and accurately describes the position, including all of the elements an organization wants potential candidates to know. Creating a well-defined job profile is a way to ensure that appropriate candidates are applying for the job and that those who are hired are the best fit for the position and the organization (Hillman, 2010). Beginning the onboarding process during the recruitment phase has numerous other benefits, such as helping the potential candidate determine if they feel the position is a good fit for them and aligns with their particular values and beliefs (Friedman, 2006).

Further, the recruitment process is the first impression a potential new hire will have of an organization (Friedman, 2006). Having onboarding front of mind can assist in framing the recruitment process as a critical factor in helping to structure further orientation in the future. This is because each new hire helps in aligning the process as it relates to their own experiences. Various questions and information about a company may already have been addressed during the

initial interview phase, which in turn will influence the onboarding plan developed for a new hire on their first day. One other important element to note when discussing the recruitment process is that, while not every candidate will be a successful new hire, they still have the ability to refer the company to other potential future new hires (Friedman, 2006). As such, it becomes vital to ensure that candidates are left with a favourable impression of the organization. This is typically achieved through pre-planning in relation to onboarding during the recruitment process.

Exploration of the initial recruitment process suggests that planning and organization at all stages in the hiring process have a significant impact on an employee's impression of the organization, which can affect their onboarding experience. By recognizing essential elements, such as defining and creating accurate job profiles and participating in an engaging and collaborative recruitment process, including in advertising and interviewing, organizations can improve their hiring process, thereby attracting the right candidates (Welty 2009; Hillman 2010). A well-executed recruitment process helps to establish a solid foundation for subsequent onboarding processes to provide the necessary support for employees to be successful within the organization.

Pre-onboarding

Pre-onboarding builds on the recruitment process and is more directly focused on the fundamental steps that an organization must take on behalf of a newly hired employee prior to their first day (Kumar & Pandey, 2017). Here we'll consider some of the critical elements that an organization must engage in prior to an employee starting and why these elements are important in the onboarding process.

Pre-onboarding is the process of getting an employee ready for their first day. This vital step engages both the employee and the employer with essential and relevant roles. For an

employer, there are several factors that must be considered as part of the pre-onboarding process, including the creation of an offer letter and providing necessary basic information about the organization and expectations, such as what time a new hire will start work and appropriate dress code guidelines (Kumar & Pandey, 2017). These elements help to prepare an employee psychologically for the transition into a new organization and ensure there is alignment with organizational norms (Kumar & Pandey, 2017). Pre-onboarding also includes supporting a new employee with administrative tasks as a way to ensure they are fully prepared for their first day (Pike, 2014). Other thoughtful elements, such as a welcome from the CEO of a company, may be incorporated as small gestures that can help "new hires feel more important and welcomed within the organization" (Pike, 2014, p. 3). Engaging in a pre-onboarding process benefits the organization and the employee, allowing for early steps in integration into the organization and the completion of fundamental tasks prior to the employee performing in their role. The idea is that the "faster a new hire is absorbed into the organization, the sooner the employee would be able to contribute to the organization" (Chillakuri, 2020, p. 4).

Company preparedness for a new employee extends beyond the numerous administrative functions of hiring a new employee. An organization must also prepare for a new hire's first day, considering such elements as establishing the employee's workspace, providing supplies, organizing a first day welcome with staff, and arranging for an onboarding "buddy" (Snell, 2006). Ensuring these elements are in place before the new employee's first day helps the organization to ensure their onboarding program supports the employee, as opposed to simply providing fundamental items such as supplies and workspace.

Although many of the above pre-onboarding elements seem logical and are supported by research, as outlined by Snell (2006) they are often viewed as aspirational. Most organizations

lack some aspects of a formal onboarding process and "more than one third are without a formal process to monitor and coordinate completion of onboarding activities" (Snell, 2006, pp. 33-34). Thus, while onboarding is recognized as an essential element of the new employee life cycle, it is still often neglected. Snell (2006) suggests the way to better manage the onboarding process and make it more useful is to identify and streamline processes, develop best practices, and perhaps even integrate technology into the process. Zidena and Joob (2020) highlight that more companies are opting to transition traditional onboarding processes to more digital and technology-based ones. Technology, specifically e-learning, can create an "environment that is flexible for employees" (Zidena & Joob, 2020, p. 736), while also being "cost effective and efficient" (Zidena & Joob, 2020, p. 736). These tools can support development of user-friendly processes that are streamlined in their implementation. Again, onboarding is not a static process that simply requires a set number of tasks to be completed via a checklist; it is a robust process in which an organization must develop a multifaceted plan to organize their recruitment and hiring processes and practices.

Onboarding requires planning, organization, and thoughtful engagement. Using a more phased approach that includes a pre-planning process supports development of an onboarding program that allows for increased engagement (Savitt, 2012). Understanding how onboarding fits into the employee life cycle helps to illuminate its importance (Welty, 2009, p. 83). As I move forward to analyze the second topic related to onboarding as identified in the body of literature, it becomes vital to understand the employee life cycle and the critical role onboarding plays in it.

Onboarding as a Method of Socialization

A second prevalent topic in the onboarding literature is the importance of onboarding as a method of socializing a new employee into an organization. Employee socialization or

organizational socialization can be understood as the process by which "new employees acquire the necessary knowledge, skills, and behaviors to fit in with a new company" (Baldwin, 2016, p. 26). As noted earlier, what is important about this definition is the idea of fit, which in many ways is a rather vague and indefinable element within the onboarding process. The term itself implies an element of intangibility that cannot specifically be determined or delineated based on skills, knowledge, or understanding. The idea is that a well-socialized employee, one who has the appropriate fit within an organization, will have a better work attitude, perform better, and, as a byproduct, have an increase in certain behaviours such as innovation (Bauer et al., 2012). Socialization, therefore, can be seen as having an important role within the onboarding process. Yet, due to certain intangible elements, its achievability and success may be viewed differently by employers and new employees. In what follows I examine employee socialization from both perspectives. First I look at socialization from the perspective of the employee, exploring the elements that help to develop appropriate socialization for the employee. I then explore socialization from the perspective of the employer, and the elements an employer needs to consider to better socialize a new employee within the organization.

Socialization from an Employee Perspective

When looking at socialization from an employee standpoint, we can understand the employee as the actor within the socialization process in relation to the process of onboarding (Klein et al., 2015). Employees are primarily responsible for their own socialization, though they will rely on socialization agents within the organization to assist them through the onboarding process (Klein et al., 2015). The role of socialization agents is to "assist the newcomer during their acculturation" (Klein et al., 2015, p. 264), with the new employee being responsible for making sense of the new workplace and asking for assistance with information as needed (Klein

et al., 2015). In this way, the onus is on the employee to navigate the organizational culture, understood as the organization's "mission, attitudes, norms, behaviors, expectations, and overarching principles and values" (Cochran, 2022, p. 56), and engage with socialization agents as a way to assist in developing a better sense of the organization and how they fit into its framework. Importantly, group culture according to Edgar Schein (2004) is understood as a "pattern of shared basic assumptions that was learned by a group as it solved its problems of external adaptation and internal integration" (p. 17). For Schein (2004), culture is about striving for patterns and integration, although different groups may have varying results in achieving these objectives. While for many organizations the common view of socialization is of an employee trying to fit into the organization, the idea of deferring ownership of socialization to the employee as a method to ensure they fit in often overlooks "important social and systemic influences" (Korte, 2007, p. 2).

Additionally, socialization is considered a fundamental element within an organization that is constantly developing and evolving, and can take some time to achieve (Korte, 2007). The socialization process for an employee is something that must be navigated throughout their career with a company, and may never end (Korte, 2007). Socialization is not unilateral; it involves multiple actors interacting and engaging. Another dimension to consider is how socialization is achieved.

Socialization is often seen as a method of integration, helping a new employee become part of an organization. Integration, as described by Stanley (2012), is when an employee's perspectives, ideas, and knowledge, meld into that of the organization. The process of integration carries mutual responsibility – the responsibility of the new employee to modify their behaviours and perspectives to meet the needs of the organization, and the responsibility of the organization

to recognize the influence a new employee may have on various workplace norms (Korte, 2007). In this way, although socialization is designed to help new employees learn the "appropriate way of doing things" (Korte, 2007, p. 3) within an organization, new employees may also influence the organizational socialization process. This implies that, over time, new employees may help the organizational structure to adapt or even change through the socialization process to meet the needs of shifting workplace dynamics (Stanley, 2012).

From an employee's perspective, the onus of self-directed socialization can be challenging. On arrival at an organization, a new employee must navigate the socialization process to absorb the knowledge, skills, and norms of an organization as a way to develop a fit within the specific workplace culture (Korte, 2007, p. 2). Yet a new employee can also have a significant impact on the ever-changing norms within the organization (Holton, 1996), recognizing that "culture is not a stagnant but a living, breathing part of the company that needs steady attention" (Cochran, 2022, p. 59). In this way, a new employee must learn to navigate the organizational culture through the socialization process while at the same time they are helping to develop it.

Socialization – An Organizational Perspective

Some of the key indicators of successful socialization from an organizational perspective include "role clarity, task mastery, and social acceptance" (Frögéli et al, 2023, p. 3). An organization's active support during the socialization process can assist new employees in meeting these indicators. One way organizations do this is through the use of socialization agents, members of the organization responsible for helping a new employee transition into the organization (Klein et al., 2015). Socialization agents themselves may also benefit from an opportunity to share their knowledge of the organization with a new employee.

Many organizations are now engaging technology to help accelerate the socialization process for new employees; using social media, such as Facebook and LinkedIn, for example, as a method of promoting new employees to help them develop a network of colleagues (Graybill et al., 2013). This allows for networks to develop more organically and may even help a new employee to establish contacts within the organization before they commence employment (Graybill et al., 2013). This strategy also aims to improve employee engagement with the organization by developing contacts that will assist new employees in navigating the new workplace environment. It is especially relevant in the context of the workplace as an integrated, multi-generational environment, in which younger employees such as millennials (those born between 1980 and 1999) are more technologically savvy and comfortable with integrating technology into the workplace (Ferri-Reed, 2013).

There are many things an organization can do to help a new employee get a better sense of their role, the organization, and key contacts, that may help to reduce stress and allow a new employee to integrate a lot of new information more successfully in a timely manner (Ellis et al, 2015). Organizations can assist in this regard by providing new employees with relevant information and opportunities that will "assist in the learning process" (Ellis et al., 2015, p. 206). An organization may wish to incorporate on-the-job training, meetings with key stakeholders, and the use of consistent check-ins (Frögéli et al, 2023). Anything an organization can do to help reduce stress for a new employee can, over time, help to reduce burnout and allow employees to function more effectively within the organization (Ellis et al., 2015). Becker and Bish (2021), elaborate on these concepts by encouraging organizations to adopt a learning perspective in the onboarding process. This highlights that organizations should place "more emphasis on the need for organizations to design the appropriate infrastructure and architecture of onboarding strategy,

policy, processes, and content to ensure that learning occurs" (Becker & Bish, 2021, p. 3). This ultimately will allow an "individual to learn about the organization and enable them to share their knowledge with those in the organization for mutual benefit" (Becker & Bish, 2021, p. 3).

Initiating an "onboarding buddy" system is another way organizations can support new employees through the socialization process. An onboarding buddy is an unofficial friend to a new employee (Graybill et al., 2013), someone who has capacity to work closely with the new employee, to be a resource and answer questions, to offer guidance on processes and procedures and the organizational environment. Questions can be as simple as the location of the bathroom and where to eat lunch, or concerned with more in-depth socialization processes, such as how to engage a particular colleague (Graybill et al., 2013). The buddy's role is distinguished from that of a mentor in that they are particularly engaged as an informal liaison to assist the new hire with socialization (Graybill et al., 2013). In this way, the onboarding buddy system is designed to help new employees navigate the workplace by providing a resource with whom they can engage more informally and comfortably.

It is evident that the socialization process and the ways in which an employer can better prepare and engage a new employee are multifaceted. Consideration and understanding of the specific needs of the organization and how to best engage a particular employee will help an employer identify ways in which they can support a new employee in navigating the socialization process more effectively. This is important in the context of the vital role that employee socialization plays, as shown above, in the success of a new employee within the organization.

In sum, the socialization process engages both the new employee and the employer. For an employee, socialization is a balancing act in which they must integrate specific norms,

knowledge, and information towards developing a good fit with an organization (Stanley, 2012), while recognizing the influence of the prior knowledge, skills, and information they bring with them upon the organization. For an employer, it becomes important to understand the organizational environment and culture, the norms of the company, and how the organization could develop methods to help a new employee best engage with those norms. In this way, the employer–new employee relationship is quite symbiotic, with each bringing important information and behaviours that engage and shape organizational norms and culture (Stanley, 2012). This relationship becomes important as I move into the third major topic identified within the literature on onboarding; that is, its link to employee retention.

Onboarding and the Link to Retention

A third topic prevalent in the onboarding literature is the link between onboarding programs and employee retention. According to Grillo and Kim (2015), nearly half of all new employees within an organization leave within the first 120 days. Grillo and Kim (2015) cite a lack of proper onboarding as one factor that may influence an employee's decision to leave an organization. A successful onboarding program has the potential to help an employee be more productive and engaged (Nobel, 2013). Nobel (2013) has shown that an effective onboarding program creates happier and better-adjusted employees, who are more likely to want to continue working in an organization. Morgan et al. (2020) discuss how an appropriate investment in onboarding may help to reduce turnover, and create "long term higher productive" employees (p. 45). In that context, the critical task of the onboarding process is to help ensure new employees feel aligned with the organization and understand and enjoy their work, allowing them to feel a greater sense of engagement, which has been shown to increase retention within the

organization. Retention is a very important concern for employers due to the significant costs associated with employee turnover.

The cost of replacing an existing employee can be relatively high, considering the time it takes to develop and post a job description, conduct interviews, successfully hire a candidate, onboard the candidate, and eventually have them performing at the same level as the previous employee. Kurnat-Thoma et al. (2017) found that the average cost associated with staff turnover in a hospital environment is between 5 and 5.8% of the annual operating budget of the hospital. For some positions, such as specialized nurses, the cost to the organization to find a suitable replacement can be up to $88,000 (Kurnat-Thoma et al., 2017, p. 2). Others corroborate this research, including Bauer (2015a), who indicated that for some positions the cost to find a suitable replacement can be up to three times the annual salary of the employee. Sharma and Stol (2020) observe that recruiting and onboarding a new employee is a significant and costly process that must account for an initial "low level of productivity" (p. 2) when a new employee begins work at an organization. These figures do not factor in non-monetary costs, which can be harder to calculate, such as the effect of staff shortages or limited specialized professionals on sick patients, and the impact recruiting has on current members of an organization (Gruzd, 2011). These examples show that recruitment can impact an organization significantly and have implications for other stakeholders. It becomes very important, therefore, and in the best interest of an employer, to help promote retention of new employees through the onboarding process. The question, then, is: What are some of the strategies employers can implement in the onboarding process to promote retention?

Retention Strategies and Employees

Baek & Bramwell (2016) have shown that "[e]ffective onboarding practices reduce turnover rates" (p. 2). Other studies have shown that employees who have a structured and organized onboarding experience are "58% more likely to remain with the organization after 36 months than those who did not" (Bauer, 2015a, p. 3). This statistic highlights the significant impact onboarding has on staff retention. Importantly, retention is directly linked to employee engagement. When employees are engaged, they feel a sense of work fulfillment (Gruzd, 2011). When employees feel more fulfilled, their sense of engagement, their passion, and their interest in the work, grows (Gruzd, 2011). It becomes important, then, that this sense of engagement be cultivated through the onboarding process. Engaging the employee from the start supports early organizational socialization, as previously discussed in this literature review, and helps an employee to better align their values with an organization. This can be achieved in various ways. One example shared in the literature was the idea of building an employee's identity within an organization. At Wipro, "a major business process outsourcing company based in Bangalore, India, that provides telephone and chat support for its global customers" (Nobel, 2013, p. 1), during an employee onboarding seminar, the organization included a discussion about identity and individuality, and an exercise that helped individuals evaluate their strengths (Nobel, 2013). At the end of the onboarding session, each employee was given a sweater embroidered with the company logo as well as their name (Nobel, 2013). Several months later a study was done on this onboarding group, and it was determined that the turnover rate was reduced by 47.2% as compared to other onboarding groups who did not have the session on identity and evaluation of strengths (Nobel, 2013). The findings also identified this group as having higher customer satisfaction scores (Nobel, 2013). The study showed that when new employees were offered an onboarding experience with a focus on individuality, it supported them with the socialization

process, helping them to identify the skills they possessed that would be beneficial within the organization (Nobel, 2013). This hints at the concept of connection, to be discussed shortly. When an employee feels more accepted within an organization, they are more willing to ask questions, more open to learning about the organization and their position, and more willing to develop relationships with colleagues (Bauer, 2015a). These are all elements that will help a new employee feel more accepted, most likely leading to increased engagement, which over time may help increase the likelihood of their staying with the organization.

Retention Strategies and Organizations

In leveraging the onboarding process to promote employee retention, organizations need to ensure their onboarding strategy aligns appropriately with organizational goals and objectives. The onboarding process is a great opportunity for organizations to identify strategic objectives that need to be adequately and appropriately relayed to new employees (Davis, 2015). One important strategic objective is career development. The onboarding process is an opportunity for an organization to identify a practical strategy for career growth and advancement and begins those conversations with the employee (Davis, 2015). Promoting the idea of career development to an employee from the beginning of their employment helps to encourage new employees to think more seriously about the organization and their potential future in it. For the organization, the most important element is to identify what their priorities are for the advancement and development of new employees in the context of the organization's goals and objectives (Grudz, 2011).

In many ways, onboarding is seen as a commitment between the employee and the organization. Each side holds a number of obligations that are understood as functions within the onboarding process (Caldwell & Caldwell, 2016). The function of the different processes can be

seen as having both written and unwritten assumptions as well as mutual responsibilities (Caldwell & Caldwell, 2016). It is implicitly understood that each party within the onboarding process is responsible for specific duties (Caldwell & Caldwell, 2016). It is important for organizations to identify the duties for the success of the employee, ensure that they align to the vision of the organization, and allow for the employee to garner trust in the organization (Caldwell & Caldwell, 2016). Trust is seen as critical in helping to solidify an employee's commitment to an organization as a contributor to a stronger culture of empowerment and engagement (Caldwell & Caldwell, 2016). What this represents is the commitment the organization has to the new employee; yet, what are the specific hopes and goals?

The literature on retention in relation to onboarding has shown that it is never too early to begin the discussion of career development. Efforts to promote retention within an organization can help reduce hiring costs, nurture a more stable work environment, and maintain a level of employee satisfaction within the organization. The onus is on organizations to ensure that onboarding programs are developed and implemented to help promote staff retention (Davis, 2015). A new employee will lean on the organization for the skills and tools needed to be successful. The organization's initiative and responsiveness will help to shape an employee's perspectives on the work environment and how they can make an impact within the organization (Davis, 2015). Incorporating the idea of retention into an onboarding program can give employees a better sense of how their specific skills align with the organization, at present and into the future. Again, the literature shows that onboarding is a two-way commitment between the employee and the organization (Caldwell & Caldwell, 2016). Each has a role to play in the successful implementation of a retention strategy. Further to this discussion, both the employee and the organization have specific duties when discussing retention, and one important way in

which an organization can ensure they are fulfilling their responsibilities to an employee is

through a well-developed orientation program that includes consideration of retention. Ensuring

a new employee understands how their position and skills may align with future development

helps to shape the new employee to meet the needs of the organization. In this way, an

organization is better able to develop their employees to reflect and anticipate the specific needs

and aspirations of both the organization and the employee.

The Four C's of Onboarding

The fourth topic present within the body of knowledge related to onboarding is the work

of Talya Bauer, understood as a broad-spectrum way of onboarding called the Four C's. The

Four C's are compliance, clarification, culture, and connection, identified by Bauer (2010) as the

building blocks for success within the onboarding process. For Bauer (2010), each C plays an

essential role within the onboarding process, and as an organization moves through the Four C's

it leverages and builds upon its strategy (Bauer, 2010). Examining the onboarding practices and

culture within a specific organization will identify which of the C's are present within the

onboarding progression. According to Bauer (2010), inclusion of all four C's in an onboarding

program will lead to a fully integrated onboarding experience in which a new employee will

have developed and acquired all the appropriate skills and knowledge needed to be successful

within the organization. In this section, I explore Bauer's Four C's and the importance of each

within the various stages of onboarding.

Compliance

"Compliance is the lowest level [in the Four C's of onboarding] and includes teaching

employees basic legal and policy-related rules and regulations" (Bauer, 2010, p. 2). Compliance

can be understood as providing an employee with the physical tools they need to navigate their

positions (Maksymiuk, 2017). Compliance would include providing a new employee with a handbook and explaining policies, such as attendance and dress code (Meyer & Bartels, 2017). It would also include helping an employee get set up administratively within the organization, such as providing guidance on initial paperwork, badges, and tax forms (Bauer, 2015a). Compliance in this way is one of the most critical stages within the employee onboarding process. Without a proper compliance process, new employees would not be able to navigate the organization and their position successfully. The general view of compliance is that most organizations can successfully integrate and complete the compliance process solely through the employee onboarding process directly related to socialization and integration (Meyer & Bartels, 2017). Still, compliance represents only the most fundamental aspects of the onboarding process. It is seen as a very functional view of onboarding, including only the basic required procedures and activities (Maksymiuk, 2017). It is also viewed as a very passive method of onboarding, in which the organization solely focuses its attention on the necessary physical tools needed for the employee to be successful (Maksymiuk, 2017). It provides a new employee with just enough information and knowledge of the organization to understand how to participate in their role (Maksymiuk, 2017). Does this offer the employee enough resources and support to be indeed successful? Moving onward in the exploration of Bauer's (2010) Four C's, I turn now to the concept of clarification.

Clarification

"Clarification refers to ensuring that employees understand their new jobs and all related expectations" (Bauer, 2010, p. 2). While compliance is about providing the physical tools an employee requires to start work, in the clarification stage employees are educated in the expectations of their role (Meyer & Bartels, 2017). This may involve receiving training on

various systems, and templates, forms, and other resources that an employee may need in their new role (Meyer & Bartels, 2017). "Clarification has a special role in the onboarding process as it serves multiple functions" (Bauer 2015b, p. 3). It ensures an employee understands their new role and related expectations (Maksymiuk, 2017). Clarity helps a new employee get "up and running as quickly as possible" (Bauer, 2015b, p. 3). Greater clarity also helps an employee to be more willing to ask questions, take risks, and generally be more effective in their role (Bauer, 2015b). Clarification is also designed to help the manager and other team members gain an understanding of the responsibilities held by the new team member (Maksymiuk, 2017). As an important outcome, clarification has been shown to help with a new employee's job performance, to increase job satisfaction and retention, and to give an employee greater confidence in their role (Bauer 2015b). It is an essential element in the broader onboarding process, helping to build understanding, align expectations, and ensure a new employee has all the tools necessary for success in the new workplace (Bauer, 2015b). Clarification in combination with compliance offers employees a foundation for effective performance. The next C within Bauer's (2010) model that I will explore is culture.

Culture

"Culture is a broad category that includes providing employees with a sense of organizational norms – both formal and informal" (Bauer, 2010, p. 2). The culture component is all about "learning the unique organizational culture of a new organization" (Bauer, 2015b, p. 3). It is generally understood that organizations have different cultures, based on factors such as personalities, and expectations that a new employee must navigate (Bauer, 2015b). The quicker and more accurately that a new employee can understand organizational culture, the greater the likelihood of long-term success within the organization (Bauer, 2015a, p. 4). To facilitate an

information transfer regarding organizational culture, employers may focus their training on the organization's philosophies and values (Meyer & Bartels, 2017). This helps new hires get a sense of the core values of an organization, and helps them navigate often "unspoken rules" to ensure they can successfully discern and traverse pathways to success within the organization (Maksymiuk, 2017). Culture can also help organizations to build "consistent knowledge and experiences" (Chreene, 2020, p. 23), leading to a greater ability for employees to be successful within their department and the organization. The culture phase in the Four C's of onboarding is linked to and supports employee socialization, with specific emphasis on transmitting organizational norms and peculiarities to provide new employees with an understanding of how best to navigate both the organizational culture and relationships with colleagues. In order to be successful, an employee must make meaning and find alignment based on their understanding of organizational norms, and it is for this reason that training to understand those norms becomes so important (Bauer, 2010). The final C in Bauer's (2010) Four C's, connection, builds on the ideas explored in this discussion of culture, I will now focus on the final C, connection.

Connection

"Connection refers to the vital interpersonal relationships and information networks that new employees must establish" (Bauer 2010, p. 2). Viewed as the "final and most integrative level in the onboarding process," connection is where an employee develops relationships both "formally and informally within the organization" (Meyer & Bartels, 2017, p. 11) and builds information networks (Maksymiuk, 2017). At this stage of the onboarding process, a new employee begins to feel like "part of the family" (Maksymiuk, 2017). Connection is essential to helping an employee feel accepted within an organization. It allows for collegial relationships to

develop naturally, providing an important resource for a new employee to draw upon when they encounter challenges as they navigate the new organization (Bauer 2015a).

There are several ways in which an organization can help ensure appropriate organizational connections are made, including assigning an onboarding buddy, providing proper introductions, and engaging in regular and relevant check-ins (Bauer, 2015a). Other actions as simple as taking an employee out for lunch on their first day, or introducing a new employee to senior leadership, have been shown to help increase connection to the organization (Meyer & Bartels, 2017). These methods help a new employee identify the colleagues and critical stakeholders within the organization that they will need to engage as part of successfully navigating their new role (Bauer, 2015a). The goal of connection is to help the new employee feel confident and a part of the organization (Bauer, 2015a).

The Four C's and Integration

In exploring the Four C's of onboarding it becomes evident that each level represents an essential element that helps an employee integrate into an organization. What I find interesting is the way in which each level builds upon the previous one towards increasing integration of an employee into the organization. Importantly, not all organizations successfully develop onboarding programs that incorporate each of the four C's. Most organizations, simply through the nature of the hiring process, cover compliance and its related factors (Meyer & Bartels, 2017). Meyer and Bartels (2017) found that only roughly 50% of organizations engaged in clarification and culture as part of the onboarding process, while only about 20% engaged in the final C, connection. These statistics are a reflection of organizational culture more broadly, and the differing views among organizations of onboarding as a method of training and its perceived value (Meyer & Bartels, 2017). Ultimately, as explored in earlier sections on the pre-onboarding

process and socialization, it is up to an organization to identify their own culture and how the onboarding process fits into their goals and ideals.

Experiential Learning Theory Revisited

Looking at how experiential learning theory supports the onboarding process, under Kolb's theory, there are four distinct stages in which a learner will begin to experience a learning process. These four stages begin with a simple observation of an experience or task (Kolb & Kolb, 2017). The learner will then reflect on the specific tasks in an attempt to gain a better understanding and make sense of the task within their own conception (McLeod, 2017). From here the learner will begin to think about learning process and begin to visualize how they may achieve this task (McLeod, 2017). Finally, the learner will actively try the new skill thus completing the learning cycle (McLeod, 2017).

I apply Kolb's experiential learning theory (cycle of learning) to represent an amalgamated learning all new employees must achieve. During onboarding, a new employee must learn how to appropriately integrate into the new work environment (Hillman, 2010). This integration includes understanding specific job roles and work culture, and navigating socialization (Hillman, 2010). An onboarding program is designed to help a new employee understand all of these factors and acclimatize to their new work environment. Experiential learning theory may support a better understanding of the learning process through which a new employee begins their integration into the organization. It takes into account opportunities for reflection, the ability to practice new skills, as well as observation and planning (Kolb & Kolb, 2017). In this way, experiential learning theory provides insights into, and a strong foundation for understanding, the experience every new employee encounters in an onboarding process, and may also help to identify limitations and explain why they may occur.

Experiential learning theory can help illuminate gaps in the successful navigation of the onboarding learning cycle. If a new employee is not given every opportunity to work through Kolb's learning cycle effectively, including addressing the ability to enter at multiple phases (Sălăvăstru, 2014), this may indicate a gap within the onboarding process and an opportunity to explore why this has occurred.

Pulling it All Together

It has been said that the purpose of an onboarding program is to help "shorten the start-up time to get the new hire on the job and producing as quickly as possible" (Dunn & Jasinski, 2009, p. 118). While this is a reasonable statement of the ultimate goal of onboarding, it does not take into consideration the intricacies required to arrive at this point. New employee onboarding is a multi-faceted process requiring a great deal of forethought and planning. Through the exploration of the body of knowledge related to new employee onboarding, four key relevant contemporary topics were identified. Each highlights important elements of the onboarding process that can have a major impact on a new employee and their experience in an organization. It is interesting to note that while the four contemporary topics focus on different elements within the onboarding process, together they offer a method of ensuring that a new employee is able to effectively navigate an organization and fulfill the requirements of their position.

The employee life cycle revisited

At the beginning of this literature review I discussed a number of terms that were important to understand while exploring the concepts, ideas and processes related to onboarding. One of the terms explored was the idea of the employee life cycle. The importance of the employee life cycle is the multi-step way in which the employee navigates their time within an organization (Welty, 2009). Recruiting, employee socialization, retention and promotion can all

be considered elements within the employee life cycle, which interestingly is also prevalent within the onboarding literature. The other important element to discuss when exploring the employee life cycle is the multi-faceted way in which the life cycle exists both representing the employee and employer's perspectives. What the exploration into the various onboarding literatures has shown is the lasting impact onboarding plays on the employee and their time within the organization. Onboarding although seen as only one process within the employee life cycle also has a great deal of influence on other elements within the employees' time within an organization.

The pre-planning is a crucial element of employee onboarding. Without forethought, an onboarding process is likely to fail before it even has a chance to begin. In the pre-planning phase, organizations must be purposeful in their recruitment activities, developing a job profile that accurately reflects the true nature of work for a specific position (Hillman, 2010). This helps to ensure the right candidate is selected, with the knowledge, skills, and abilities necessary for the position (Hillman, 2010). It also helps the organization ensure alignment between the new hire, the position, and the organization's values and beliefs (Friedman, 2006).

Once an employee starts at an organization, the socialization process becomes key to integrating them into the organization, by ensuring they acquire the information, resources and connections necessary to navigate their position successfully within the organization (Klein et al., 2015). This stage helps the new employee develop contacts within the organization (Graybill et al., 2013), which can help them better navigate the work environment while also assisting with learning and reducing stress (Ellis et al., 2015).

Pre-planning and socialization are important elements that support a new employee in the initial stages of onboarding. Well executed, they, like all stages of onboarding, help to promote

greater retention within the organization. Employee recruitment has a great deal of impact on both an organization and current staff (Gruzd, 2011). Recruitment costs can be significant, far surpassing a full-time employee's salary, and can affect the ability of an organization to operate effectively (Kurnat-Thoma et al, 2017). Onboarding offers an opportunity to begin to support and encourage new employees in considering their abilities and goals and how those align with the organization's vision (Nobel, 2013), helping a new employee to recognize how they can align themselves to best meet the needs of the organization over time.

The final topic recognized within the literature is Bauer's (2010) Four C's of onboarding. The Four C's emphasize the link between onboarding and organizational culture and values, and offer a way in which to view the role of onboarding within a given organization (Meyer & Bartels, 2017). Each C is seen to represent a building block upon which to design and develop onboarding programs (Bauer 2010). Depending on the organization and their view of onboarding, the program may be more or less integrated to include various factors. Again we see that onboarding as a method of providing support to a new employee within an organization can vary. The literature on onboarding shows that onboarding is different for each person and each organization.

Linking onboarding and the employee life cycle underscores the dynamic nature of the process, and its reliance on multiple factors while influencing many more. Onboarding is clearly an important process that helps an employee understand their role and how they align to the organization (Klein, Polin, & Sutton, 2015). It also helps an organization both recognize their own organizational culture and values, and plan for the future (Meyer & Bartels, 2017).

The knowledge gained from this literature review was used to align my research on onboarding practices within a large, research-intensive university in western Canada with the

relevant, contemporary topics from the body of knowledge on onboarding. Findings from my

research, in turn, have helped me to gain further insights into salient contemporary topics within

onboarding, and, I hope, will amplify, and add to the discussion and to the body of knowledge on

onboarding.

Summary

In this chapter, I reviewed the most relevant contemporary topics outlined in the body of

knowledge on onboarding, including the pre-planning process, onboarding as a method of

socialization, onboarding and the link to retention, and the Four C's of onboarding.

Building on the knowledge acquired from this literature review on onboarding, in

Chapter 3 I detail the elements of research design that guided this study.

CHAPTER 3: Research Design

Overview

In this chapter, I focus on providing an understanding of the methodological foundation of my research into onboarding programs at a large, research-intensive university in western Canada. This includes detailing my research questions, ontological and epistemological underpinnings, methodology, theoretical framework, participants and recruitment process, data collection, data analysis, trustworthiness, and ethical considerations.

Research Questions

The primary research question that informed this research is as follows:

Do current onboarding processes at a large, research-intensive western Canadian university provide unionized administrative and professional staff the knowledge and skills needed to successfully integrate into the university environment and their new role?

Secondary research questions include:

a) How are onboarding processes designed and experienced within this work context?

b) What resources, supports, and processes impact an individual's integration into their role and the university environment?

These questions helped inform the single instrumental case study methodology and data collection process, and also assisted me as a researcher in understanding and situating the various perspectives that guided my research.

Ontological and Epistemological Underpinnings

A constructivist paradigm most aligns with my ontological and epistemological view as it is a relativist, transactional paradigm that is dialectical in its methodology (Lincoln et al., 2017). The constructivist paradigm comprises two distinct viewpoints that underscore different

approaches. The first is cognitive constructivism, which looks at the important role of the mind in learning (Schcolnik, Kol & Abarbanel, 2016, p. 13). The second is social constructivism, which focuses "on the key role played by the environment and the interaction between learners" (Schcolnik, Kol & Abarbanel, 2016, p. 13). In considering the different approaches relative to my general interests and within the boundaries of my focus on onboarding, I feel the social constructivist paradigm best aligns with my research goals. Understanding the onboarding environment and the learner, as well as the critical relationship both play in the onboarding process, are two elements of the social constructivist paradigm that resonate (Creswell, 2014). In the social constructivist paradigm, research questions are developed with the purpose of being general, so that participants can create their own meaning, while also encouraging active questioning, more significant social collaboration, and an enhancement of dialogue (Creswell, 2014). Social constructivism, with its focus on the participant and their view of a situation, aligned well with my own research goals, as a way to interpret the meaning participants gave to questions, and helped me to recognize patterns and develop theories based on what participants highlighted as being important (Creswell, 2014). Social constructivism offered a relevant paradigm from which to interpret the various meanings participants assigned to their onboarding experiences and to develop further discussion to enhance the existing body of knowledge on onboarding.

Theoretical Framework

The theoretical framework that informs my research is experiential learning theory. As explored earlier, according to Kolb's experiential learning theory, there are four distinct stages in which a learner experiences a learning process. These four stages begin with a simple observation of an experience or task (Kolb & Kolb, 2017). The learner will then reflect on the

specific tasks to gain a better understanding and make sense of it within their own conception (McLeod, 2017). From here the learner will begin to think about learning processes and start to visualize how they may achieve this task (McLeod, 2017). Finally, the learner will actively try the new skill thus completing the learning cycle (McLeod, 2017).

I applied Kolb's theory, also known as the cycle of learning, to the data analysis in this study. This provided an additional lens through which to view the data, and offered a secondary understanding of how better to engage with the research findings.

The onboarding process is fundamentally a process of learning. A new employee must learn how to integrate appropriately into their new work environment, including understanding specific job roles, work culture, and navigating socialization (Hillman, 2010). An onboarding program is designed to help a new hire manage all of these factors and acclimatize to their new work environment. Linking experiential learning theory with onboarding helps to support a better understanding of the process in which a new employee begins their integration into an organization. Kolb's cycle of learning considers opportunity for reflection, the ability to practise new skills, as well as observation and planning (Kolb & Kolb, 2017). In this way, experiential learning theory provided a strong foundation for my research and a focused lens through which to view the process every new employee encounters during onboarding.

Experiential learning theory may also help explain limitations within the onboarding process. A central factor as I believe this study shows in effective onboarding is the successful navigation of the learning cycle. Several questions emerged from my consideration of onboarding through the lens of experiential learning theory: How does the learning cycle influence the onboarding process? Are new employees given the opportunity to effectively work through Kolb's learning cycle? Does the onboarding process account for the ability to enter at

multiple phases (Sălăvăstru, 2014)? Does the onboarding process take into account prior knowledge? These tertiary questions arising from experiential learning theory helped to guide the scope of this research and informed the data analysis.

Methodology

Qualitative methodology was designed "to answer questions about the 'what,' 'how' or 'why' of a phenomenon" (Bricki & Green, 2002, p. 3). A case study builds on this by helping researchers develop "an in-depth analysis of a case, often a program, event, activity, process, or one or more individuals" (Creswell, 2014, p. 14). These cases are typically "bounded by time and activity, and researchers collect detailed information using a variety of data collection procedures over a sustained period of time" (Creswell, 2014, p. 14).

There are many types of case study, each with their own scope and focus. There are three specific methodologists, Robert K. Yin, Sharan Merriam, and Robert E. Stake, who provide procedural guidance when conducting a case study and are widely viewed as foundational methodologists for educational researchers (Yazan, 2015).

For Yin (2002), case study is designed to explore a specific phenomenon in real life, that includes specific contextual factors (Yin, 2002; Yazan, 2015). Yin (2002) defines three types of case study, explanatory, descriptive, and exploratory, each designed for specific situations that would make it the most applicable and appropriate to use (Yin, 2002). The primary focus in this type of case study method is to understand the how and why of a specific phenomenon (Yazan, 2015).

Merriam views case study as an opportunity to make sense out of, or construct meaning from, data, which involves consolidating, reducing, and interpreting research data (Yazan, 2015). In Merriam's view, data collection and analysis should occur simultaneously, with data analysis

becoming increasingly thorough as more data is collected (Yazan, 2015). This recognizes that modifications to data collection or alternative phases within the research study may occur as a result of the initial data collection (Yazan, 2015).

For Stake, case study is about impressions and results (Yazan, 2015). In this form of case study, researcher impressions are an important part of the data analysis and help to make meaning of the research being conducted, as well as the final results (Yazan, 2015). This type of case study focuses on understanding the complexities of a case and might focus on a few key issues (Creswell, 2013). Stake distinguishes three distinct types of case study: instrumental, collective, and intrinsic (Creswell, 2013). In an instrumental case study, a researcher focuses on a single "issue or concern, and then selects one bounded case to illustrate this issue" (Creswell, 2013, p. 99). A collective case study, or multiple case study, focuses on a single issue or concern but "selects multiple case studies to illustrate the issue" (Creswell, 2013, p. 99). In an intrinsic case study, the focus of the study is on the case itself, "because the case presents an unusual or unique situation" (Creswell, 2013, p. 100).

As discussed in Chapter 1, this research study employed a single instrumental case study as the methodology for data collection and analysis. The broad focus of the study is to understand current onboarding practices as discussed within the literature and compare those with current practices at a large, research-intensive university in western Canada. Using this as the foundation on which to ground this exploration, it was evident that this study engages a single instrumental case study. An instrumental case study "serves the purpose of illuminating a particular issue" (Creswell & Guetterman, 2019, p. 477). This method of case study can result in rich discussion, as cases are typically bounded by certain factors that help separate out the research into specific limiting factors (Miles et al., 2014). In this type of bounded research

system, it is important to consider how many limits a researcher should place on the collection of the data. (Merriam & Tisdell 2016).

In this research study, I employed several strategies that helped to create a robust instrumental case study analysis while also working to ensure the study was narrow enough in scope to offer a manageable and appropriate means of data collection. Some of the methods utilized in the study include analysis of university-specific onboarding documents, semi-structured interviews, and a curated recruitment process that ensured relevant participants were enrolled into the study. These factors supported the collection of fulsome research data to inform the data analysis in this study.

Participants

The participants in this study were selected based on a number of qualifying factors that would ensure the data collection process was relevant, both in containing important characteristic factors pertaining to the university and in that all participants had similar initial experiences surrounding their onboarding. The following factors were applied to ensure the profile of participants in the study contained certain fundamental and uniform attributes.

- Unionized support staff employees: The first fundamental attribute is designed to ensure that all participants have similar onboarding criteria. The university contains three separate employment classifications – management, support staff, and faculty or academic staff ("HR Summary by Staff Group", n.d.c). Each is guided by charters and agreements designed to meet the diverse needs of their specific employment group ("HR Summary by Staff Group", n.d.c). As each group functions differently within the university setting, onboarding practices are designed to meet the diverse needs of each group to ensure successful integration into their unique context in the university

environment. For the purposes of this research study, it was important to delimit the study

to a manageable subsection within the university. As a former support staff employee, I

am most familiar with these onboarding practices. Additionally, these onboarding

practices are strongly organized with checklists, videos, and other prescribed activities,

creating a more robust process for analysis.

- Length of employment: The second fundamental attribute of study participants focused

  on length of employment with the university. It is widely believed that onboarding

  processes should be updated consistently to address shifting needs within an organization

  (Graybill et al., 2013). Ensuring that all participants had had a consistent onboarding

  experience that reflected similar practices required that all participants partook in an

  onboarding program within a consistent timeframe. This was ensured by enrolling

  employees that have worked at the university for one year or less into the study, which,

  additionally, increased the likelihood that participants would remember the various

  experiences of their onboarding.

These limitations were chosen to help ensure uniformity of the onboarding experience

across documents, videos, and other onboarding resources that may be employed.

Participant Recruitment

Recruitment of participants to this study was done through a process of homogeneous

sampling, in which participants were selected based on distinct characteristics (Creswell, 2012),

including the above-mentioned limiting factors involving length of employment and union

membership. Participants were recruited using a targeted e-mail sent from the university's

human resources department. In addition, I engaged in snowball sampling, asking all participants

to help identify other individuals who met the requirements of the study and might be interested in participating (Creswell, 2012).

The anticipation was that there would be between eight and twelve participants. This number was based on the limiting factors as well as some concern surrounding the willingness of new employees to engage in the study. Additionally, as discussed by Guest et al., (2006), this number aligns with the typical saturation point for a homogeneous group of individuals (the point in which no new information is gathered from interviews), which is no more than twelve interviews.

Recruitment involved the submission and approval of a robust ethics application and consisted of working with an individual at the university, human resources department to identify a curated list of individuals who met the specific limiting factors of the study (members of the university union employed at the university for less than one year).

It should be noted that due to the ever-evolving COVID-19 pandemic, there was a gap of roughly five months from approval of the ethics application to the launch of recruitment through communications sent to potential participants. This was due to Human resources priorities dramatically shifted, in response to the COVID-19 outbreak. Once I was able to engage human resources and discuss the research project, including scope, method of data collection, and type of support needed, the recruitment communication was sent from human resources to the curated list of individuals within a few short weeks.

Within a week of sending the recruitment communication to potential participants, I had reached research threshold, with nine participants volunteering to engage in the study. Due to the length of time between when ethics was approved and when the recruitment information was distributed, and already having reached participant threshold, I opted not to send follow-up

communications to recruit additional participants. Instead, I focused on engaging with my volunteer participants through a method of snowball sampling, which had been built into my participant communication plan as part of follow-up communications, and approved as part of my ethics application. The snowball sampling was conducted by asking each participant, during the last question of their interview, to consider identifying other individuals who may be interested in participating in the study. To ensure alignment with the ethics approval, each individual was e-mailed a brief recruitment package – including a prepared communication defining the scope and objective of the study and providing my contact information – with the intention that it be forwarded on to potential participants. Although a few individuals did identify that they knew of people who may be interested in participating in the study, no new participants were recruited.

There were nine participants in this study, representing three university faculties and five units (service departments not associated with a faculty). The five individuals who came from service departments within the university represent five distinct units. Four participants came from three different faculties, with two participants being from the same faculty. There was diverse participant job function, with all participants having a unique role and no two individuals holding the same type of position. Of the nine participants, three worked at three separate locations not at the university main campus, and, except for the two participants who worked in the same faculty, all participants worked at different university locations even when on the same campus. It is important to note that all nine participants had begun work at the university prior to the COVID-19 pandemic and all had face-to-face, in-person onboarding experiences.

Data Collection

Phase One

The first phase of data collection focused on accessing pre-existing documents at the university pertaining to onboarding. This included gathering relevant documents, a close read of all documents gathered, and a recording of major themes and priorities relevant to onboarding processes and protocols. This helped me to better understand the specific onboarding practices employed by the university, and also informed the development of the semi-structured interview questions (See Appendix A).

Phase Two

In the second phase of data collection, I conducted the semi-structured interviews. The interview process was a formal one, consisting of interviews structured through the use of purposeful questions built and developed to address the research questions (Jamshed, 2014) and guide the interview process. The interviews consisted of central questions that should be included in all interviews, and additional secondary questions to help guide and develop the conversations within the interview process (Jamshed, 2014). The interviews were typically 30 to 45 minutes in length and had an element of free-form conversation while remaining structured. This helped to encourage free discussion, which allowed for a more in-depth exploration into each interview participant's onboarding experience (Jamshed, 2014).

Due to the COVID-19 pandemic, all interviews were conducted remotely, either via phone call or Zoom. These interview methods were included in the initial ethics application to ensure increased flexibility for participants. Of the participants who opted to conduct their interviews via Zoom, all chose to mute their video and have an audio-only interview, with no cameras activated. The interviews were scheduled for one hour in length to ensure enough time

for each individual to reflect adequately on their onboarding experiences. The shortest interview was approximately twenty-one minutes in length and the longest interview was forty-one minutes in length.

All interviews, including phone calls, were recorded using Zoom and all recordings were stored locally in a password-protected folder on a password-protected computer. The final seven interviews were also recorded on an apple iPod to provide an emergency backup recording of each file in case there were connectivity issues with Zoom or Internet outages. This device was also password-protected and all recordings were transferred and removed from the device once transcription was completed.

Data Review and Analysis

Step One

The first step of data review involved examining existing onboarding documents at the university pertaining to current onboarding practices. The analysis began with a scan of literature related to onboarding at the university, with the purpose of determining alignment with contemporary topics as discussed in the body of knowledge pertaining to onboarding (Creswell, 2012). The secondary function of this process was to assist in the development of the semi-structured interview questions (Creswell, 2012). It was important to ensure interview questions were contextualized within the central tenets of the university's onboarding philosophy (Creswell, 2012). The benefit of this high-level scan of onboarding data was the creation of relevant semi-structured interview questions that helped foster a sense of familiarity and ease among interview participants, allowing for smoother interviews.

Step Two

The second step of data review and analysis was conducted through transcription of the semi-structured interviews. All interviews were recorded then transcribed. Recording was done to help eliminate the need to take notes (reducing concerns about missing important information) and to assist in creating a more comfortable environment for the interviews (Creswell, 2012). The purpose of recording was also to help each participant feel that the interview was more of a facilitated conversation than a formal interview.

I transcribed all the interviews myself, both to contribute to my understanding of the data and to help me grow as a new researcher. Transcription of participant data took roughly 50 hours to complete. During transcription, all recordings were slowed to 75% of their initial speed to allow for an easier pace in typing and review. All transcripts were reviewed twice to ensure accuracy of the data captured and slight modifications were made to the transcripts as needed during the review process.

Step Three

Once all transcripts were verified and data accuracy was confirmed, I began the process of data examination. This process included the identification of 10 broad categories (see Figure 1, p. 66) and development of a coding rubric that took into consideration the research questions as well as the contemporary topics identified within the body of knowledge on onboarding. This ensured that the data was examined through the lens of my theoretical framework as well as the topics that emerged from the literature (Creswell & Guetterman, 2019).

Having defined the broad categories, I used NVivo, a qualitative data analysis software, to isolate various comments into the broad categories. This process was done over the course of a few weeks, during which I consistently referred back to the coding rubric to help me sort

comments. Once the initial division of comments into broad categories was complete, I revisited each category and reviewed the consolidated data. It became evident that the 10 broad categories could be further reduced, as four categories had very few responses. These categories were: "Four C's" and "Four C's – Areas for Improvement," and "Successful Integration" and "Successful Integration – Areas for Improvement." I revisited the consolidated data from each of these categories and found that most of the data was contextual and could easily be integrated into the other six categories. Once I integrated the data from these four categories into the other six broad categories, I began an additional review of the data.

In further examining the data it became clear that the various comments fit broadly into two overarching themes, each with their own subdivisions. I called the first of these new, larger overarching themes "Getting Started," as it focused on information about the pre-onboarding process, the onboarding checklist, and the new employee orientation – all information found in the "Pre-onboarding" and "Pre-onboarding – Areas for Improvement" coding categories. The other category, which I called "Resources, Supports and Reflections," focuses more on supports provided during the onboarding process, the socialization experience, and additional reflections surrounding the onboarding experience found in the original coding categories of "Supports and Services," "Supports and Services – Areas for Improvement," "Socialization Positive," and "Socialization – Areas for Improvement."

Step Four

Once the interview data was consolidated into the two broad categories, I began the formal data analysis. This included reviewing the data from the two broad categories through the lens of the contemporary and relevant topics identified within the onboarding literature. The aim was to clarify further the positioning of the information gathered during the data collection

process, in order to better understand alignment between the university's onboarding practices and the topics identified in the literature as being central to a successful onboarding program.

Step Five

Analysis of the data also included a secondary exploration of the information through the lens of experiential learning theory. As previously noted, experiential learning theory aligns well with the onboarding process in its consideration of the importance of opportunities for reflection, observation, and practising new skills (Kolb & Kolb, 2017). This secondary analysis provided context for the research and helped to explain why specific elements occurred within the data. Analyzing the data through the lens of both the onboarding topics and their alignment with experiential learning theory offered a more holistic picture of the learning environment through the onboarding process.

Ethical Considerations

Many essential elements were addressed to ensure the study was both relevant and furthered the body of knowledge related to onboarding, while also protecting the rights and privacy of participants.

First, the study was approved by the research ethics board at the university, ensuring the research and various data collection methods met appropriate ethical considerations. As part of this submission, a number of elements were addressed to help ensure privacy and confidentiality for participants.

Privacy and Confidentiality

Ensuring participants' privacy and confidentiality was paramount in this exploration of onboarding at a large, research-intensive university in western Canada through a method of semi-structured interviews with individuals currently working at the institution under study. Privacy

refers to the idea that an individual may "decide for themselves when and where, in what circumstances, and to what extent their attitudes, opinions, habits, eccentricities, doubts, and fears are to be communicated to or withheld from others" (Cohen et al., p. 63). This is an essential concern in the context of this study, where participants were asked to share sensitive and confidential data about their experiences in their current workplaces. Mindful of this context, I left it up to participants to determine what they wanted to share during their interviews. As the interviewer, I prompted each participant regarding their answers, but ultimately respected their rights to share as much or as little of their experiences as they felt comfortable with.

Confidentiality was also paramount in ensuring the information shared by participants cannot be tracked to them. It was critical to avoid a potential situation in which participants' personal thoughts and anecdotes related to their onboarding experiences could come into question or create issues for them regarding their employment within the organization. Confidentiality best understood for the purposes of this research as "researchers know who has provided the information or are able to identify participants from the information given, they will in no way make the connection known publicly" (Cohen et al., p. 65). This was an important consideration within the interview process, to help create and foster an environment where each participant felt free and comfortable sharing their personal experiences (Blandford, 2013). This was achieved by: (a) is through the system of data collection where all research information and data including transcripts was stored on a password-protected computer; (b) excluding information about a participant's department and other identifiable characteristics, such as age, ethnicity, gender, and previous work experience, from the final research document; and (c) offering all participants the opportunity to select a pseudonym to be used within the final research document, which all but one did. Additionally, all participants had an opportunity to

read the final research document and flag any concerns or issues before it was submitted. These various safeguards ensured the privacy of participants and the confidentiality of their sharing, and put participants at ease through the interview process.

Trustworthiness

To ensure the accuracy and credibility of the data collection, several robust methods were put in place, helping to develop greater trustworthiness in the results. In a qualitative study employing instrumental case study as the method of data collection and analysis, there are many ways to ensure trustworthiness at various stages of the data collection process. In the preparation stage, trustworthiness can be assured through a robust data collection method encompassing an initial series of pre-research that includes: considering various elements, such as suitability of data and types of interview questions (descriptive vs. semi-structured), identification of the research question, and self-awareness as a researcher (Elo et al., 2014). Conducting this pre-research process helped to ensure the preparation stage for the data collection process was well established and appropriately aligned to the overall objectives and goals of the research proposal. During the data collection stage, "the strategy to ensure trustworthiness of content analysis starts by choosing the best data collection method to answer the research questions of interest" (Elo et al., 2014, p. 3). Attentiveness at this stage allowed for the data collection to be both relevant and appropriate within the scope of the research proposal (Elo et al., 2014). Finally, in the data analysis stage, it was important to ensure an adequate level of analysis and interpretation of the content in order to validate trustworthiness and confirm credibility of both the data and the research process (Elo et al., 2014, p 5).

In my own data collection process, the relevant elements at each stage were identified and thoroughly analyzed. This helped to develop a sense of confidence in the data collection

process as well as ensuring appropriate alignment among the research questions, the data collection, and the data analysis.

Limitations

Method

This study into onboarding practices within the university was conducted using a single instrumental case study methodology with a data collection method of semi-structured interviews. Using this methodology and method for data collection yielded detailed information that was analyzed and compared against best practices identified within the body of knowledge on onboarding. While the method of data collection did yield important data, the unfortunate timing of the process during the COVID-19 pandemic may have created some limitations on the generation of data. All semi-structured interviews had to be conducted remotely, with all participants opting for audio-only conversations. Some information, such as body language, facial expression, and interpersonal connection was inevitably lost due to the interview modality. This may have limited both the information participants provided, and the understanding gleaned from participants' responses and behaviours, during the interviews.

Sample Size

One of the primary limiting factors affecting this study is the number of individuals who were willing to participate. As mentioned, the study employed a single instrumental case study research methodology using semi-structured interviews as the method of data collection. Although the nine individuals recruited to the study represent slightly more than the recommended participant threshold, the secondary recruitment process of snowball sampling failed to produce any additional participants. There may have been some hesitation from potential participants to engage in the study due to the nature of the research and interview

questions, asking participants to reflect on their onboarding experiences and provide detailed

information and examples. Potential participants may have experienced some fear or uncertainty

regarding anonymity or confidentiality, or simply not felt comfortable sharing their experiences.

Delimitations

Primary delimitations focus directly on location, participants, and length of employment.

Location

This research study surrounding onboarding was conducted at one university. Limiting

the study to a specific university helped to more deeply explore onboarding practices at that

university. The particular university was selected because I am currently employed there,

allowing me a broader understanding of the university's onboarding practices and ensuring a

more detailed study. While this study of the university provided an excellent opportunity to

amass detailed information, one specific limitation in having the university as a research subject

is that the organization receives government funding, which may influence certain employment

practices, which may in turn skew results.

Participants

I focused on a very specific pool of participants – organizational support staff who are

members of the university union. The rationale for this delimitation was that all unionized staff

members must complete a specific onboarding program. This ensured all participants had a

similar onboarding background upon which to draw and discuss specific observations and

experiences. This helped to make the overall research more reflective and grounded in contextual

similarities, and to highlight gaps and limitations.

Length of Employment

Building on the participant delimitations above, the secondary prerequisite to be included in this study was an employment time of less than one year with the organization. This delimitation was important, as it ensured all participants had recently completed the onboarding process, and that there was uniformity in the greater institutional onboarding protocols, documents, and communications used in their onboarding.

Summary

In this chapter, I addressed research design elements, including research questions, ontological and epistemological underpinnings, methodology, recruitment of participants, data collection, data analysis, ethical considerations, trustworthiness, as well as limitations and delimitations. The research design detailed in this chapter supported robust processes and a thoughtful and purposeful examination and understanding of the importance of onboarding topics at a large, research-intensive university in western Canada.

CHAPTER 4: Findings and Analysis

Overview

In this chapter, I present research findings based on reflections from nine semi-structured interviews, divided into two categories: 1. Getting Started; and 2. Resources, Supports, and Reflections. I then transition into the data analysis, exploring first the correlation between the nine interviews and the established contemporary onboarding topics identified within the literature, and then alignments between onboarding practices at a large, research-intensive university in western Canada and Kolb's experiential learning cycle.

Participants

As stated in my approved ethics application for this research, to ensure participants are not identifiable, I do not include such participant information as position levels, faculty or unit, or other defining features such as start date, age, or gender.

All nine participants consented to being audio taped. Eight chose to use a pseudonym while one participant asked that their real name be used. This participant will not be explicitly identified but their real name will appear within this thesis.

Table 2

Research Participants

Name of Participant
Jane
Tatiana
T
Tiffany
Hildegard
Jamie
Hoai
CB
E

Broad Categories for Initial Coding

Broad categories used for initial coding can be seen below in Figure 1, along with a brief definition of each category. These categories and definitions helped ensure consistent coding across all interviews.

Figure 1

Broad Categories and Definitions for Initial Coding

Successful Integration – Positive

Definition: Comments/actions/discussion points that demonstrate or illustrate elements that lead to the successful integration of individuals into their new positions. Integration is understood in a broad sense here to include integration into the department and into the position.

Successful Integration – Area for Development

Definition: Comments/actions/discussion points that demonstrate or illustrate elements that were a gap or limitation to the successful integration of individuals into their new positions. Integration is understood in a broad sense here to include integration into the department and into the position.

Supports and Services – Positive

Definition: Comments/actions/discussion points that demonstrate or illustrate successful communication or implementation of supports and services (i.e. that relevant supports or services were offered/provided) that assisted an individual to better integrate into their role.

Supports and Services – Area for Development

Definition: Comments/actions/discussion points that demonstrate or illustrate unsuccessful communication or implementation of supports and services, or comments

identifying supports or services that may have assisted the individual that were not offered/provided, indicating a gap in the support they received to integrate into their role.

Pre-onboarding – Positive

Definition: Information on positive pre-onboarding practices – practices that demonstrate predetermined actions pertaining to the individual or the position prior to the first day.

Pre-onboarding – Area for Development

Definition: Information on gaps in pre-onboarding practices – practices that demonstrate gaps or uncertainty in predetermined actions pertaining to the individual or the position prior to the first day.

Socialization – Positive

Definition: Comments/actions/discussion points that demonstrate or illustrate successful practices in the socialization, or social integration, of individuals. Social integration is understood in a broad sense here to include opportunities to connect (in meetings, for assistance, etc.).

Socialization – Area for Development

Definition: Comments/actions/discussion points that demonstrate or illustrate unsuccessful practices in the socialization, or social integration, of individuals. Social integration is understood in a broad sense here to include opportunities to connect (in meetings, for assistance, etc.).

Four C's

Definition: Comments/actions/discussion points that demonstrate or illustrate the Four C's (compliance, clarification, culture, connection). Note: This category may in many ways be a catch-all category, as relevant comments may also fit into other categories.

<u>Four C's – Area for Development</u>

Definition: Comments/actions/discussion points that demonstrate or illustrate a gap or limitation surrounding the Four C's (compliance, clarification, culture, connection). Note: This category may in many ways be a catch-all category, as relevant comments may also fit into other categories.

Findings

The research findings are presented in two broad overarching categories, each with their own subdivisions. The first category, "Getting Started," focuses on the pre-onboarding process, the onboarding checklist, and the new employee orientation. The second category, "Resources, Supports, and Reflections," looks at supports, the socialization experience, and additional reflections surrounding the onboarding experience.

Category 1: Getting Started

The first category, Getting Started, was sorted into three groups: pre-onboarding, the onboarding checklist, and the new employee orientation. The data highlighted within this category focused on the documented employment processes that help a new employee get started at a large, research-intensive university in western Canada.

Pre-onboarding. Each participant was asked to reflect and provide information about resources or supports they had received from their hiring manager or the university's human resources team (HR) to help them prepare for their first day. During this reflection, six participants (CB, E, Hoai, Jamie, T, and Tiffany) identified that they had received resources and supports prior to their first day. The remaining three participants (Hildegard, Jane, and Tatiana) identified they had not received resources.

Supports Provided. Participants who did receive resources prior to their first day were asked to elaborate on the types of resources they had received. Three individuals, E, Jamie, and T, indicated they had received information about IT setup. For E this information pertained to setting up their "UCalgary account and stuff." For Jamie it was about "set[ting] up my IT, I'm not sure [of] the terminology here, whatever gets setup on the IT side of things." T received the most informational support, noting, "I received quite a few e-mails from the department; set up your computer, computer ID, and this kind of thing."

Five individuals, CB, E, Hoai, Jamie, and Tiffany, identified that they had received links to onboarding resources and training. CB indicated, "[T]hey sent me the onboarding link, to the UCalgary site," while E received different information: "[A]nd then, with HR, they told me some course that I had to complete before starting . . . I think it was a safety course." Hoai spoke about receiving lots of support and information: "I got . . . instructions from [my manager] on how I have to prepare before getting to work in the campus; for example, I had to do some occupational safety and health training and get the certificate." Jamie mentioned receiving information about employee set up: "I had information . . . they set me up, and on [my] first day I was able to see all the onboarding stuff that I needed to do." Tiffany received an "e-mail with links to the support staff onboarding checklist and then a list of onboarding activities that [my manager] wanted me to do before I started."

While T did not mention receiving links prior to the first day, they did highlight that "my hiring manager . . . assigned a person to help me to get familiar with the environment." By contrast, Hoai said her hiring manager "explained . . . the offer letters, what it means, [and] the terminology." Finally, E also spoke about receiving information from the hiring manager: "She

told me about parking options, . . . where I could park on campus, 'cause I work at a satellite

campus, so she told me what I had to do if I wanted to get parking on campus."

All participants who received supports found them beneficial. CB highlighted that the

resources gave "a good sort of overview of the university in general and the courses to sign up

for, and the benefits, and all that kind of stuff, so that was useful." E noted:

> I have worked in different post-secondaries so . . . taking the safety courses and knowing
>
> where, for example, if there was a fire, where the muster point was at my campus, so that
>
> was good for me to know . . . and knowing what I could do and/or what I could be asked
>
> to do was good as part of my role.

Hoai emphasized,

> [T]he university is a new environment to me. I have not worked in any educational
>
> institutions before. I worked for non-profit organizations most of my life, so everything
>
> in the university was brand new to me, and that's the reason I was a little bit nervous
>
> when I took this job. But when I got the job, the managers always work[ed] side by side
>
> with me and [gave] a lot of instructions so I felt more confident.

Tiffany highlighted several thoughts around the pre-onboarding resources received:

> Some of them [were beneficial] and then others were confusing because there was no
>
> context provided for them. The support staff onboarding checklist is very detailed and
>
> some of it I wasn't sure what I needed to do specifically before I started; it wasn't clear.
>
> But the rest of [the checklist] was helpful in making sure that I had the right IT access
>
> and access with my UCID, so that those kind of things wouldn't hold me up when I was
>
> actually working.

Supports not Provided. As mentioned, Hildegard, Jane, and Tatiana identified that they had not received resources prior to their first day. Hildegard stated, "I mean, I had links to information online so definitely had information about benefits, but not necessarily as preparing for the first day." Both Jane and Tatiana indicated they did not receive any pre-onboarding supports or information. Jane responded, "Um, no," while Tatiana specified, "I did not receive any information."

Having not received pre-onboarding resources, Hildegard, Jane, and Tatiana were asked to reflect on what would have been helpful to have received prior to their first day. Each had a unique answer specific to their own identified needs. Hildegard noted:

> [F]or me, more task-based things about the first day, so I knew where to go and when to be there, but there wasn't information, such as your workspace looks like this, you will have the ability to store your lunch here, you would typically get a lunch break from here to here; you know, those kinds of things.

In Jane's view,

> [I]t was rushed, so I didn't get the information ahead of time that required actions that had to take place overnight. So, initially, such things like the university ID, for example. I had an ID from when I was a student many years ago that wasn't activated. They had to reactivate the student ID, so before that nothing could get set up.

Tatiana emphasized:

> What would have been helpful was maybe just the expectations of . . . the onboarding process and how that would go. . . . [P]robably other information that would have been helpful is, ahead of time, maybe just providing me with how my first day would go.

The Onboarding Checklist. All interview participants were asked to discuss the onboarding checklist provided by the university. All nine participants indicated they had used the onboarding checklist, with CB, Jane, and Tiffany making explicit reference in their interviews to using the checklist: "[A]h yes, yeah, I used it" (CB); "Yeah, yes, very much so" (Jane); "Yes, I did use it" (Tiffany).

All participants were then asked if they found the onboarding checklist helpful, and all nine agreed it was helpful, with two participants directly noting, "I found it helpful" (E) and "Yeah, it is helpful" (T).

What was Helpful? Participants were then asked to elaborate on what they found helpful in the checklist. Three participants, CB, Hoai, and Jamie, talked about registering for training courses. CB mentioned "that [it] was all helpful and then just knowing that there was those training courses." Hoai detailed, "Yes, I knew which course I have to take as a compulsory, as a mandatory training courses." While Jamie explained, "Well, I went on and looked at it and did whatever I needed to do. I did those seminars."

CB noted that the onboarding checklist helped "get set up in the system, doing things like, you know, setting up my e-mail and my phone . . . and the benefits enrollment; that kind of stuff." Building on CB's discussion, E indicated:

> I found it helpful, and the good thing with that, when I thought I had finished all my onboarding stuff and I e-mailed HR to say, 'Hey, like I think I've done all my onboarding stuff,' they were like, 'No, you had missed a couple things,' and so it was my misunderstanding of what those other things were.

For Tiffany the checklist was good because "it was helpful just to be able to go through everything and then know when you're finished, that you've done everything that's been laid out

for you, so . . . you're at a good starting place to get going." T also mentioned that the checklist

helped: "Yeah, that is helpful, because sometimes we probably forget something and this time,

no." Hildegard, having previously worked at the university, reflected:

> I did use the onboarding checklist and, like I say, because it hadn't been my first time at
>
> the university, it was . . . familiar to me, and several of the items had already kind of been
>
> taken care of in terms of registering for the health and safety program and that kind of
>
> thing. Those had already been done but for sure I used the checklist, yeah.

> *Limitations.* Jane and Tatiana, while indicating that the checklist was beneficial to them,

also highlighted some limitations within the checklist during their onboarding experiences. Jane

stated,

> [Y]ou have to kind of reply all to that checklist and say, 'I received my e-mail address
>
> and here it is' so that they can . . . do the other aspects of it on the back end; but
>
> everything – like your [IT access], your token, your authentication – everything takes an
>
> overnighter thing. . . . I think in my situation, I think HR was, like, two days behind
>
> processing a few.

In contrast with Jane, who focused more on HR and IT processes, Tatiana suggested,

> I think it would have been a lot more helpful if, say, the manager sat down and said
>
> here's the link, this is the onboarding process, this is the list you can go through, and just
>
> kind of giving me advantages of it. I think that would have helped me a lot more than for
>
> her just telling me to go online and find the link to do the onboarding process.

> **New Employee Orientation.** All nine interview participants were asked to discuss the

university's new employee orientation session and contemplate their experience. Eight of the

interview participants attended a new employee orientation, while Hildegard, having previously

worked at the university, did not attend but had previously attended and shared reflections from the previous orientation.

Was the New Employee Orientation Beneficial? Of the eight participants who attended new employee orientations, three (CB, Jane, and Hoai) indicated that they found it beneficial. Hoai mentioned, "Yes, I got a lot of information on that day," while Jane elaborated, "[B]eing at the university, it was very beneficial learning together."

Four individuals, E, T, Tatiana, and Tiffany, did not directly acknowledge that they found the new employee orientation beneficial, and Jamie expressed uncertainty, indicating "[M]y role, I guess, may be a bit different than some of the other roles in there, so maybe it didn't really apply as much. . . . I think there was probably a little bit that was probably helpful."

Biggest Takeaway. When asked to further elaborate on the biggest takeaway from the new employee orientation, the consensus was that there was a strong focus on information and resources provided during the orientation, including an emphasis on the union, payroll, family assistance, and benefits. T specifically identified the union session as being a key takeaway: "I think the benefit explanation and the union session, yeah, this kind of stuff." Hoai recalled "policies and insurance and, yes, so many things; I took a lot of notes on that day." E found the discussion of other resources beneficial: "For me it was the resources available to us as employees. They talked about the family assistance program, like, if you are having any struggles." Jane noted that it "was very beneficial learning together, the campuses that are out there and how they are set up, and just knowing, like, the dean's office, the admin office, where IT support centre is, the big picture was really helpful." Finally, for Tatiana, "It provided us with a lot of that basic information. I want to say probably just the payroll information was my biggest takeaway, and who we can reach out to [for] specific information regarding things."

Limitations and Gaps. While there was consensus on the information resources provided during the orientation, three individuals, Jamie, Jane, and Tiffany, did feel there were some limitations and gaps surrounding the new employee orientation. Jamie highlighted: "So some of the stuff that, you know, in general, like research or students [supports], like, it just seemed some of the stuff just wasn't . . . necessarily as helpful [in] the long run." Jane felt the orientation would have benefitted from more focus on the larger institutional context:

> [I] would have . . . liked to know more about the way the university is governed . . . We know the person who's the head, but how faculties are put together, and how do people report up to them, and how do things get, you know, put into your plate in terms of policies and procedures. That would have also been nice to have, but [they] didn't divulge into that.

Of the three individuals who noted gaps within the new employee orientation process, Tiffany's discussion was the most substantial:

> I came out of the orientation feeling like I didn't really learn much about the university, like general information about it, history, or anything like that, and it was almost like the resources that were provided to help new employees weren't expanded on more than providing a website to go to.

Asked to expand, Tiffany discussed a potential disadvantage of having not been previously affiliated with the university:

> Yeah, for sure, so I think that people that attend the university, like as a student and potentially then move on to working there, have more information about the institution that they can use in their role and leverage for having a better perspective about priorities and goals of the institution. Then I was brand new – I did not go to the university as a

student – so I did not know very much, and I was hoping to kind of get high-level history

or overview that would help you form sort of an identity with the university and use that

in your work.

Tiffany then compared the experience to a previous new employee orientation at a different post-secondary institution.

Okay, so my previous experience with a new employee orientation at a different

institution was very extensive in outlining the resources available to staff. Mostly to do

with payroll and benefits, . . . because the benefits system and how to access it is kind of

complicated. A walkthrough of that would have been helpful, because the process is

different from what I experienced at a different institution. So, things like how to use the

. . . PeopleSoft access in that section where it is about benefits or payroll, there [is] not

much documentation or help on how to navigate that, so I was hoping that there would

have been something like that in terms of resources for new staff.

Tiffany was then asked why the new employee orientation at a different post-secondary

institution was more beneficial:

Ah, I think that it was mostly beneficial because of how complicated of a process some of

those things can be, such as knowing how to designate your health spending account

balances or how to find out what things apply for your benefits when they kick in; even

things like how to use like credits for taking classes. I actually still don't know how to do

that.

Category 2: Resources, Supports, and Reflections

The second category, resources, supports, and reflections, has three general groupings: supports, the socialization experience, and reflections on the onboarding experience. The data highlighted focuses most directly on new employee reflections and perceptions.

Supports. The nine interview participants were asked to reflect and discuss the specific supports they were provided in addition to the onboarding checklist and new employee orientation to help them adjust to their new roles at the university.

Work-related Documents and Supports. Five individuals, E, Hildegard, Hoai, Jane, and Tiffany, discussed receiving work-related documents to assist them in their roles. E noted, "I think it was probably like the following week that the previous associate dean sent me some documents that she wanted me to print, so that as we were discussing I could refer to them." Hoai mentioned that her manager "also shared with me some documents, some forms, that the department was using [to help] me to complete my administrative task." Jane also talked about receiving documents: "Yeah, so . . . they gave me the usual documents." Tiffany said received both physical documents and a USB drive: "Yeah, so . . . I received help documents, physical documents as well as a USB that had files with information that I could go through at my own pace to get up to speed with my department, and sort of . . . standard operating procedures." Hildegard mentioned documents around computer supports: "I had access to all the drives, which was great, and then was given some places to look through for information documents, and was basically given some time to kind of orient myself."

Jane also spoke of receiving an onboarding e-mail. "Then I received, yeah, the onboarding email from our admin and that had told me, like, how to walk through the steps of

getting on board and the various training that was available on the website at the university, so I was directed to all those things."

E and Tatiana both mentioned training with colleagues. For Tatiana this training was around getting "to know each other a little bit better and we went over what the expectations were of the role." E had meetings with the previous associate dean.

> So when I started, the associate dean that we had . . . had only been there since a few months before I started and so the previous associate dean … a few hours a day in the week was kind of like orienting me to as to what our department did, what we were about, who our partners were, the different pillars within my faculty, where we fit in, where I fit in.

Additional Supports. When interview participants were asked what additional supports would have been beneficial to help with the onboarding process, four individuals, CB, E, Hoai, and Tatiana, discussed the need for more documentation to help support them in their new roles. CB noted that, "[A]s far as for my role specifically, there wasn't necessarily a lot of documentation, so, like I said, I was maybe a little bit worried." Hoai suggested:

> I think that if they have some kind of guidance, guidelines on paper that showed me if you want to look for these documents you can find here and then give me the link, and then I could find it by myself instead of going and ask." Tatiana expressed that "it would have been good to receive, like you were saying, some sort of documentation about my expectations.

E also made note of the lack of documents and information:

> [S]o for me it was in the first couple of weeks that I realized that the other person who had been in my role had a very different way of keeping documents and files, so I think

when the person retired, most of that information was on the person's desktop and not in

the shared drive, so when I was actually doing the work and trying to continue, I realized

there was a lot of gaps in the information.

Tiffany spoke about gaps in receiving specific work-related resources and being

connected to other individuals at the university who were in a similar role.

[V]ery much of my role is in collaboration with similar units across the institution, so

who are the key people to contact, who is responsible for answering questions . . . maybe

a detailed breakdown of key contacts in other places at the university or maybe training

that they offer to get you up to speed on standards for different tasks that are common

across units, across the university.

Gaps. A trend that was discussed by four individuals, Jamie, Jane, T, and Tatiana, was a

gap in equipment or IT access to successfully engage in work. Jamie noted that "there was no,

really, computer or access to the system, when I arrived for the first couple weeks." Jane

highlighted IT gaps in system access: "Can't somebody follow up from IT, say, okay, you have

all the systems access, that there are a lot of systems that you do need access to right [now]?" T,

like Jane, also mentioned having difficulties:

So the first few weeks I couldn't get any printed documents and everything is supposed

to be online, but in the first few weeks some of the online I just cannot see and the

account still had not been set up properly . . . so that give me a little bit of difficulty.

Tatiana talked about IT issues with a building access card:

When I first started working there my access card wasn't working for a good month. . . .

So I had to wait to enter, be early every time, every morning for a good month, so it

would have been good to have that access prior to me starting my role.

Socialization Experience. The nine interview participants were asked to discuss their initial socialization experiences at the university. A number of commonalities emerged.

Meeting with the Manager. Seven interview participants, CB, E, Hildegard, Hoai, Jamie, Jane, and Tatiana, were met by their manager when they first arrived at the university. CB expressed that "[B]asically my boss just took me around." E mentioned that "I spent, I think, maybe half the day with my manager." Hildegard noted, "So I arrived and actually my supervisor was a bit late in meeting me, so I had a bit of a wait at the start of my day." Hoai said that on the first day at the university, "I came to meet my managers first because she reminded me to come to see her." Like Hoai, Jamie also "arrived and had the original meeting with my manager." Jane elaborated more fully on the experience: **"**[S]o first day was really exciting, because you're new and everything is brand new, right, and having to show up to this great position. I was pleasantly received by my director." Finally, Tatiana stated, **"**[O]n the first day when I met with my manager . . .".

Although T and Tiffany did not mention if they met with their manager, neither explicitly stated that they did not.

Introduction to Colleagues. All interview participants indicated they were introduced to colleagues on the first day. CB mentioned, "[B]asically . . . my boss just took me around and introduced me to the people who were in their offices, and then my office gets a lot of foot traffic as well." E's manager "set up, like, little meetings with my team members so that I could meet with them and talk with them about their roles and what they did in their roles." Hildegard, like E, "was shown to my workspace [and] kind of introduced to the people that were immediately around me." Hoai was given more support: "[I] met my manager, she took me to the department,

a lot of offices, . . . introduced me to the professors and to the graduate students." Tatiana's manager also facilitated introductions:

> [S]he had introduced me to that fellow co-worker of mine that I continued working with throughout the time, and so that was quite helpful, and then that same day we had a meeting with the entire team, so I got to meet the team at that time.

Jamie was greeted by the manager and then,

> [A]t that point [my manager] kind of walked me through the office, . . . explaining the area, the departments, and people if they weren't at their desk, and if they were he introduced me to them. . . . [H]e started off with my team, my group of people, and then we kind of spread out to the rest of the office area.

Jane too was met by the manager at the beginning of the day and then, "along the way got personally introduced to a lot of the people on the floor, was shown the various aspects of a where to get what kind of thing and . . . just making introductions [on] the first day." T also emphasized that their manager facilitated introductions: "[I] met all the co-workers and introduce me and introduce them to me." Finally, Tiffany noted that it was her onboarding buddy who on the first day "took me around the office and tried to introduce me to as many people as possible, and introduced what they do and their role."

> ***Onboarding Buddy.*** Five individuals, Jamie, Jane, T, Tatiana, and Tiffany, mentioned being assigned an onboarding buddy (while not necessarily using the term "onboarding buddy") to assist with the onboarding process. Jamie mentioned that an onboarding buddy "took [me around], said I could go with her for meetings to kind of follow and learn what's happening during that process of our job." Similarly, Jane was

paired up with one of the seniors that are equivalent to my role who kind of guided me,

so she was my go-to person, and we had started getting to know each other, and she was

the one who was pretty much training me on what we were required to do.

T was also "assigned a person to help me to get familiar with the environment." Tatiana's

colleague, "the one that I work next to 'cause a lot of our work is quite similar, so she somewhat

guided me throughout the whole thing." Tiffany's buddy, as noted above, "took me around the

office and tried to introduce me to as many people as possible, and introduced what they do and

their role."

Supports from Team. Four individuals, E, Hildegard, T, and Tiffany, mentioned being

provided supports from members of their departments throughout their onboarding. E stated,

"Yes, so like the first few weeks as I was settling in and trying to figure things . . . it was easy for

me to go and ask [for] support from my team members." Hildegard also talked about asking team

members for help:

A couple of co-workers, when I would ask a question, they would say, 'Of course you

wouldn't know that because it's the weirdest process in the world,' and so . . . they would

go over the process and say, 'See, you know, it actually doesn't make sense but that's

how we do it.

T revealed that "all of the co-workers . . . have been in the university for more than 10 years, at

least 10 years, so I'm the newest one. I'm the newbie, so yeah, I can get a lot of advice and

tricks. Tiffany had:

one-on-one meetings with people that I would be directly working with in my team, and

that was helpful to be able to sit down with them, get to know these people, both in their

role but also on a social level, and just feeling more comfortable in who I have

established relationships with that I can talk to.

Struggles to Meet Colleagues and Get Support. While the overall trend surrounding

workplace socialization was positive, there was an overarching theme mentioned by five

participants. Hildegard, Hoai, Jane, Tatiana, and Tiffany all expressed that, at least initially, they

struggled with either meeting their colleagues or asking for help. Jane found it difficult

to know who fits into what or, I mean, like, learning their experiences, the different

departments on the floor, and I mean the onboarding is isolated but . . . you manage to

kind of gingerly work your way through.

Tatiana discussed issues with, for instance,

sending out e-mails or an e-mail request, and inquiring and having some sort of questions

or asking for advice, some people were quick to respond but [the] majority of people take

days to respond to e-mails and I don't know if it's just a heavy workload.

Tiffany identified gaps, noting: "I didn't meet a lot of people to begin with – they were either

missing or the opportunity to be introduced to them was kind of only offered on the first day – so

I feel like I was meeting people for the first time for quite a while after I started." Hildegard

discussed limitations in that,

[T]here wasn't a lot of interaction with other members of the small unit or the broader

unit at that time, so I wouldn't say that it was a super positive social situation. Like I say,

it's a very quiet group and it's a huge open office environment where very rarely a sound

is made, so . . . it wasn't, like, negative, but certainly wasn't I wouldn't call

welcoming. . . . I think it would just be a matter of, like, not feeling like I would be

interrupting someone or causing a problem in their day to ask a question.

Hoai too noted a gap:

> When I first came to the university in my position – I also have some experience in a
>
> similar position before, but each organization they have the different process, so I didn't
>
> know about that process. I didn't know that after this step who I had to support [me], so
>
> every time I had to speak to the manager, and I know she is so busy, that I sometime[s]
>
> [tried] to find the answer for myself instead of going to her and ask[ing] her the question.

Finally, T highlighted, "[I]f possible, and I would say all of the online resources are great, but,
like, the face-to-face, . . . the in-person orientation may be better."

Additional Participant Reflections

One of the final questions in the interview asked individuals to reflect and freely share
some considerations or thoughts around their onboarding experience. There were some
commonalities among the participants' responses.

Lack of Clarity Surrounding Benefits. Four individuals, E, Hildegard, Jane, and
Tiffany, all discussed a lack of clarity surrounding benefits and the need for more explicit
supports. E mentioned information around benefits from the union:

> I asked questions about, you know, what benefits I had as a union [member] . . . . I don't
>
> know how they can do it because I know there's lots of movement when it comes to
>
> employees, . . . but if somebody is really new and they need to get that information, I
>
> think it would be better in the beginning.

A comment from Tiffany mentioned earlier resonates here:

> knowing how to designate your health spending account balances or how to find out what
>
> things apply for your benefits, when they kick in, even things like how to use, like,
>
> credits for taking classes. I actually still don't know how to do that.

Hildegard discussed confusion in the timing of when benefits reset:

> [Y]ou start to have an understanding as [to] when do your vacation hours reset, when do your personal leave days reset, . . . when does your health spending account reset. You can find all this information if you go digging, but I do recall, like, at the end of last calendar year, someone just said, 'Oh, hope you got all your personal leave days used up,' and I'm, like, 'Why?' . . . thinking they operated on the same calendar as, like, health spending account, and they're, like, 'Oh, you gotta use them by the end of the calendar year.'

Jane also talked about wanting more information on benefits:

> Yeah, I would say . . . more the benefits, like understanding what your pension is, understanding what your benefits are. . . . [T]here's the MaPS [Management and Professional Staff] world, and the union-managed world, and they are very different based on whatever, right, so it's hard to probably break it down. But I don't think there was [information during onboarding]. I still don't know all my benefits. I'm going to the dentist today for the first time and I don't know what's covered.

Limitations around Campus Resources. Four individuals, Jamie, Jane, T, and Tiffany, highlighted limitations in onboarding to their particular campus, both in terms of the physical space and the various resources available. Jamie said, "I guess the other thing . . . would be just understanding the layout of the campus." T mentioned using a map: "[T]hat is helpful; . . . the first two weeks . . . I got lost everywhere, I always remember[ed] my copy." Jane wanted to know more about the campus layout:

> [H]aving tours of the university would be helpful. . . . Here is the medical, here [is] where you can go get chiro. There's all these services that, you know, you're allowed to access.

Apparently the medical is only for students unless it's an emergency, and if . . . the injury occurred at your office, at your workplace. . . . [T]he dentist is there but it works just like any other dentist, anyone can access [it]. There are, well, food courts, self-explanatory, but here are some other coffee places around the campus . . . .

Tiffany discussed a lack of resources around finding buildings and other services:

I do remember attending the new employee orientation and I had expectations that it would. . . be useful for people that had never been on campus before or experienced anything that had to do with the university;. . . things like where to find certain buildings or different food locations or different units that you might need to access for, you know, HR purposes or finance or something like that. And it actually . . . wasn't really helpful in that sense.

Supports Surrounding Satellite Campuses. One of the individuals who worked at a satellite site, E, talked about a lack of onboarding supports surrounding their specific campus:

So the information that I got during onboarding was good for main campus, not so much in terms of satellite campuses, so I would say, in terms of my campus, it was just me asking questions from those there and me kind of figuring it out myself, you know, like where are certain buildings, . . . knowing how to get there. And so I would say I spent some of the time just figuring things out.

Additionally, two participants who work from satellite campuses spoke about their lack of familiarity with main campus. Jamie said:

[I'm] not attached to main campus, but close to it, and it seems like that's where we work unless we need to go and attend meetings. . . . You just get more familiarized [when you] walk around and go to meetings.

E made note of confusion around parking:

> I know, for me, every time I was going to main campus, even this year, my preference
>
> was to go with transit because I was never 100% sure where employee parking was on
>
> main campus, and I didn't want to go and park somewhere where I might end up getting a
>
> ticket. So, because I'm not on that campus that often, I think, for me, when I get there,
>
> sometimes it's a little intimidating as to knowing where I have to go. But maybe that
>
> might just be me not going there at all that often, so I don't know how that can be
>
> bridged.

The Work Environment and Onboarding. There were also several comments specific
to the individual, their work environment, and the onboarding experience.

CB spoke about further supports for managers: "I guess maybe the university could
support that a little bit more, with sort of maybe more training for the managers as to sort of what
your first day, week, and month should kind of look like." . CB also spoke about,

> I think maybe one thing that would be helpful would be sort of the ability for managers or
>
> for a co-worker to do things like, you know, buy coffee or buy lunch, or set up meetings
>
> for people . . . as opposed to maybe necessarily relying on [an] outside event happening
>
> to get people to meet other people. . . . You know, setting up coffee dates for people to
>
> talk, setting up lunch meetings with the various groups and different departments, you
>
> know, maybe specific events for new employees, . . . for people to socialize with them
>
> . . . .

Tatiana spoke about further support systems to assist in getting onboarded to a specific
role:

I think what I would do is have that support system, when someone does come onto the job, where they get the accurate training for the job, for the job role. . . . So, for instance, if I'm starting that role, I think it would be best to have someone there who knows that role and who knows what's expected of that job. So it's good to have someone sit next to you and kind of show you and help you along the way, and someone that you can actually talk to when you do have questions . . . .

Hildegard expressed feelings that onboarding at the university was more focused on the process side of onboarding instead of the people side:

I feel like at the university there's focus on, 'Here's your computer password, here's how you log in, and we've got to make sure your benefits are all set up,' and that's where I see onboarding at the university, whereas in any other role I've onboarded with it's, like, 'Welcome, we're so glad to see you, let's get you engaged with your co-workers, here's your project team. . . . [M]ore the people side of things instead of the process side of things.

These research findings inform the data analysis that follows. First I will discuss alignments between onboarding practices at a large, research-intensive university in western Canada and the topics identified within the literature, then move on to a secondary analysis of the data through the lens of Kolb's experiential learning cycle.

Analysis

The data from the research findings was analyzed using two distinct lenses. The first included reviewing the data through the lens of the major topics identified within the exploration of scholarly literature related to onboarding. This was done to determine positioning between the data and the relevant topics identified within the literature. The four major topics identified

within the literature are highlighted in Table 3. The second analysis was done through the lens of

experiential learning, to identify and provide context for relevant themes in the research and help

explain specific observations in the data.

Table 3

Topics Identified within the Literature

Topic	Focus
The Pre-Planning Process	Recruitment
	Pre-onboarding
Onboarding as a Method of Socialization	Socialization from an employee perspective
	Socialization from an organizational perspective
Onboarding and the Link to Retention	Retention strategies and employees
	Retention strategies and organizations
The Four C's of Onboarding	Compliance
	Clarification
	Culture
	Connection

Alignment to the Pre-planning Process?

The pre-planning process focuses on two distinct elements: the recruitment process and

the pre-onboarding process. Each has a vital role in aiding the organization with onboarding.

Recruitment factors, such as a well-defined job profile (Hillman, 2010) and advertising for the

position (Welty, 2009), can help candidates determine if the position aligns with their values and

beliefs (Friedman, 2006). Pre-onboarding is the process of engaging with an employee between

the stages of being hired and starting in their new role (Bhakta & Medina, 2021). It focuses on

getting an employee prepared for the first day (Kumar & Pandey, 2017), while also nurturing excitement about and engagement in their new position (Carpenter, 2023).

Recruitment Process Revisited. For this analysis I will not be discussing the recruitment process. This element of pre-planning focuses directly on the employer and their responsibility to develop a position, advertise, and recruit a new employee. As this study focuses on recently hired employees, the participants' ability to offer insight on the recruitment process is limited to a newly hired employee perspective, and would not provide a fulsome representation of the employer's recruitment process, creating an inconsistent analysis.

Pre-onboarding Revisited. There is a strong focus in the literature on pre-onboarding on preparedness – the steps taken by an employer and employee to help prepare an individual for their first day (Kumar & Pandey, 2017). When looking at the interview data, six of the nine participants received resources prior to their first day at the university. Five received links to onboarding resources and training, and three received links to IT setup. Of the six individuals who received resources prior to their first day, most spoke positively of this experience: Hoai said, "I got a lot of support and instructions from [my manager] on how to prepare before getting to work at the campus"; while Tiffany, discussing whether pre-onboarding items received were clear, felt, "some of them, yes, and then others were confusing because there was no context provided for them."

There were three individuals who did not receive any resources prior to their first day at the university. Hildegard spoke of receiving some information: "I had links to information online, so definitely had information about benefits, but not necessarily as preparing for the first day." Neither Jane nor Tatiana received any resources or information. When probed further as to what may have been some desired resources, Jane shared that, "[I]t was rushed, so I didn't get

the information ahead of time," while Tatiana mentioned, "maybe just providing me with how my first day would go."

In looking at the fundamentals of pre-onboarding as discussed in the literature and comparing it to the responses during the interviews, it appears that for those individuals who did receive resources prior to their first day, most felt the information was beneficial in helping them prepare for their new positions, as highlighted by CB: "[It] gives a good sort of overview of the university in general and the courses to sign up for, and the benefits and all that kind of stuff, so that was useful." Among the individuals who did not receive any prior resources, all felt they were lacking information to assist them in getting ready for their first day.

When comparing the university practice surrounding pre-onboarding to the ideal descriptions defined within the literature, in general there is alignment between best practices and those implemented by the university. As highlighted by the three individuals who self-identified as not receiving any resources or information, though, there is still room for development.

Onboarding as a Method of Socialization Revisited.

Socialization is a process in which a new employee learns, understands, and adjusts to their new role (Bell, 2021). This is important as it helps the employee perform better within the organization (Bauer et al., 2012), through the acquisition of organizational values, norms, attitudes, behaviours, and abilities related to the job (Godinho et al., 2023; Frogeli et al., 2023). Both the employee and the employer have important roles in the socialization process. The employee is primarily responsible for their own socialization, by making sense of the organizational culture and frameworks (Klein et al., 2015). The employer also has an important

role in assisting the employee with socialization during the onboarding process, through the use of socialization agents and providing appropriate information and resources (Klein et al., 2015).

A Socialization Perspective. In examining socialization processes at the university, much of the data focused on interview participants' perspectives and reflections on various measures put in place to assist with socialization. Reference to the body of literature on onboarding enabled a more holistic analysis and robust discussion of the socialization process at the university, from the perspective of both the employer and the employee.

One of the key elements discussed in the socialization literature focuses on the concept of socialization agents – individuals who will help a new employee acculturate to their new role (Klein et al., 2015). Socialization agents are understood as individuals who may act as a mentor and/or coach to support workplace training and facilitate opportunities to meet key stakeholders within the organization (Frogeli et al,. 2023). Seven of the nine participants spoke of being welcomed by their manager on their first day, as highlighted most distinctly by Jane, "So [on the] first day, it was exciting because, you're new and everything is brand new, right, and having to show up to this great position really just felt [great], and I was pleasantly received by my director." Moreover, all nine participants discussed being introduced to individuals within their department, as emphasized by E: "So what my manager did was that she set up, like, little meetings with my team members, so that I could meet with them and talk with them about their roles and what they did." These actions highlight the facilitation of socialization, and potential development of socialization agents, within the department. This is again underscored in Tiffany's comments:

> I also had meetings, like, one-on-one meetings with people that I would be directly
>
> working with . . . within my team, and that was helpful to be able to sit down with them,

get to know these people, both in their role but also on a social level, and just feeling more comfortable in who I have established relationships with, that I can talk to.

In addition to socialization agents, another key element discussed in the literature is an onboarding buddy system. An onboarding buddy is a dedicated individual who works closely with the new employee, helping with the transition into the new organization (Heimburger et al., 2020; Becker & Bish, 2021). Five of the nine participants discussed having been assigned an onboarding buddy to help them get better acquainted with their tasks and role. Jane highlighted the onboarding buddy's critical role in helping with training:

I got paired up with one of the seniors that are equivalent to my role, who kind of guided me, so she was my go-to person, and we started getting to know each other, and she was the one who was pretty much training me on what we were required to do.

Tiffany expressed more of the socialization element of the onboarding buddy role: "[My buddy] took me around the office and tried to introduce me to as many people as possible, and introduced what they do and their role."

The literature highlights the important role socialization has in building connection (Carlos & Muralles, 2022), as well as the new employee's responsibility for their own understanding of the workplace and for seeking assistance from others if needed to help with that understanding (Klein et al., 2015). Four individuals discussed being provided relevant supports from members in their department in their initial first few days, best described by Hildegard's reflection:

A couple of co-workers, when I would ask a question, they would say, 'Of course you wouldn't know that because it's the weirdest process in the world,' and so . . . they would

go over the process and say, 'See, you know, it actually doesn't make sense but that's how we do it.'

Although four individuals highlighted supports from members of their departments in those initial first few days, five participants (including two individuals who spoke of being provided support from members in their department), mentioned that they struggled at least initially to either meet with colleagues or ask them for help. Hildegard reflected, "I think it would just be a matter of, like, not feeling like I would be interrupting someone or causing a problem in their day to ask a question." Hoai echoed Hildegard's comments: "I had to speak to the manager, and I know she is so busy, that I sometime[s] [tried] to find the answer for myself instead of going to her and ask[ing] her the question." Tatiana discussed a separate issue around response timelines:

> [F]or instance, with, say, sending out e-mails or an e-mail request, and inquiring and having some sort of questions or asking for advice, some people were quick to respond but the majority of people take days to respond to e-mails, and I don't know if it's just a heavy workload.

There is a strong correlation between the socialization processes discussed in the literature and those practiced by the university, as reflected in participant responses. Most elements discussed in the literature are present in participant responses, including socialization agents, onboarding buddies, and the ability to reach out and ask questions. Although not all individuals shared the same socialization experience, all participants did acknowledge their socialization experience and highlighted elements present within the literature.

With the main responsibility for socialization being on a new employee, the data draws attention to the university providing opportunities for new employees to engage in socialization.

It is more difficult to assess what the data reveals for the five individuals who initially struggled to meet with or gain support from their colleagues. Much of this data is constructed on personal reflections and feelings. Tatiana's comments were directly related to the speed with which e-mail replies would be received. In reflections shared by Hildegard and Hoai, both mentioned not wanting to interrupt or bother colleagues with questions. These comments are personal feelings, and neither Hildegard or Hoai can know if their questions were truly bothersome or interruptive for their colleagues. Similarly, comments from both Jane and Tiffany focused more on not having the opportunity to meet everyone right away, as highlighted in Tiffany's reflection:

> It was kind of weird that I didn't meet a lot of people to begin with. They were either
>
> missing, or the opportunity to be introduced to them was kind of only offered on the first
>
> day, so I feel like I was meeting people for the first time for quite a while after I started.

This comment indicates that Tiffany felt the onus was on the new department to introduce everyone in the office. As with the discussion on bothering colleagues, it is difficult to assess the relative impact, as the literature on socialization notes that it is the new employee's responsibility to seek assistance, ask questions, and gain knowledge (Klein et al., 2015), and it is unclear if the new department felt that Tiffany should have autonomy to meet different individuals within the department, or if this was discouraged.

Overall, the data highlights elements from the socialization literature present within socialization processes at the university, specifically around onboarding buddies, socialization agents, and supports from colleagues within the department. The data also exposes some potential gaps based on comments and reflections around the level of support provided, and the communication and mutual understanding of a new employee's role within the socialization process.

Onboarding and the Link to Retention Revisited.

One of the main purposes of an onboarding program is to increase employee retention within organizations (Badshah & Bulut, 2020). Retention strategies provide organizations with a competitive advantage (Blount, 2022), by helping to cut down on recruitment costs, and create more engaged employees (Gruzd, 2011). This helps to maintain a strong level of satisfaction within the work environment (Caldwell & Caldwell, 2016) and to build a strong organizational culture (Blount, 2022). For employees, retention strategies help build a stronger sense of identity (Nobel, 2013) and motivation (Badshah & Bulut, 2020), which allows individuals to feel more accepted within an organization. Employers benefit by strengthening employee commitment to the organization, while also building a stronger work culture (Caldwell & Caldwell, 2016). Ultimately, it is the employer who is responsible for ensuring retention strategies are built into an onboarding program (Davis, 2015).

Retention at the University. Based on the data collected and the insights and reflections shared, it is challenging to identify a strong correlation between interview responses and the literature on retention. Retention strategies from an employee perspective, as discussed within the literature, focus most directly on developing a sense of engagement, building a feeling of identity, and recognizing ways to motivate and reward employees (Nobel, 2013; Badshah & Bulut, 2020). It is believed this increases the engagement of new employees (Gruzd, 2011) and the likelihood they will stay with an organization. Throughout the responses and discussion, interview participants did not share insights about feelings around identity or developing a sense of engagement with the greater institution that would help to identify a convincing link between the onboarding experience and the probability of their retention by the organization.

Conversely, themes did emerge when focusing on retention strategies from an organizational perspective. The literature on organizational retention strategies focuses on two elements. The first is career development as a part of onboarding – developing strategies early on to promote growth and advancement within an organization (Davis, 2015). The second focused on the idea that organizations need to ensure alignment to the vision and values of the institution and how a new employee's role fits into this framework (Caldwell & Caldwell, 2016). In examining the interview data, no respondents discussed strategies engaged in by the university to promote growth and advancement within the organization. By contrast, when looking at organizational alignment (understanding the vision and values of the organization) and the link to how individual roles fit with the broader university framework, some discussion did emerge in the data. Three individuals felt that efforts to ensure alignment to the vision and values of the institution were missing from the onboarding process. Jane discussed a lack of information provided during the new employee orientation:

> [I] would have liked to know more about the way the university is governed . . . . We know the person who's the head, but how faculties are put together, and how do people report up to them, and how do things get, you know, put into your plate in terms of policies and procedures. That would have also been nice to have, but [they] didn't divulge into that.

Tiffany felt similarly that the new employee orientation session lacked information about the greater university context:

> I came out of the orientation feeling like I didn't really learn much about the university, like general information about it, history, or anything like that, and it was almost like the

resources that were provided to help new employees weren't expanded on more than

providing a website to go to.

Hildegard offered an interesting insight: "I feel like at the university there's focus on, 'Here's

your computer password, here's how you log in, and we've got to make sure your benefits are all

set up,' and that's where I see onboarding at the university."

This analysis highlights a gap in the university's onboarding process as regards

leveraging onboarding to promote retention. No link is evident in the data to significant topics in

the retention literature. Participants did not focus discussion on retention strategies, nor on how

the organization could better engage through practices, policies, or activities within the

onboarding process to enhance the likelihood of retention. The only relevant issues discussed

focused on organizational alignment, and all three individuals who referred to this brought

forward negative reflections, emphasizing gaps in information provided, as well as a focus more

directly on the process side of orientation. It is evident that a gap exists between the university's

retention objectives and participant experiences of employee onboarding at the university.

The Four C's of Onboarding Revisited

As explored earlier, the Four C's of onboarding, compliance, clarification, culture, and

connection, represent distinct elements within the onboarding process, each having an important

role. Compliance equips new employees with the physical tools, including policies, procedures,

and guidelines, needed to navigate their position (Maksymiuk, 2017; Ibrahim et al., 2022).

Clarification provides education and communicates expectations to a new employee about their

role (Meyer & Bartels, 2017; Becker & Bish, 2021). Culture focuses on learning about

organizational norms and values (Bauer, 2015b; Ibrahim et al., 2022), while connection offers

opportunities to develop relationships, both formal and informal, within the organization (Meyer

& Bartels, 2017; Becker & Bish, 2021). The inclusion of all Four C's is understood to lead to a highly integrated onboarding experience in which there is organizational commitment and support, and the new employee learns how to successfully operate within the organization (Bauer, 2010; Chillakuri, 2020). As noted previously, many onboarding programs do not engage successfully with all four C's (Meyer and Bartels, 2017).

When I analyzed the literature on the Four C's to determine if alignment exists to the data collected, a number of commonalities emerged. Of note, two areas, culture and connection, had strong overlap with the previously discussed topics of socialization and retention, recognizing the alignment between these processes.

Compliance: The Onboarding Checklist and New Employee Orientation.

Compliance is concerned with the basic policies and legal tenets a new employee must understand (Bauer, 2010; Becker & Bish, 2021). This includes documents explaining organizational regulations, and may include other items such as legal paperwork, policies, and rules (Bauer 2015a; Ibrahim et al., 2022). Compliance is understood to be the most critical stage in the onboarding process, as it ensures a new employee can navigate their position within the organization (Maksymiuk, 2017). For the university, one of the key ways to ensure compliance is through the use of the onboarding checklist. When analyzing the literature in relationship to the collected data, all nine interview participants stated they had used the onboarding checklist and found it helpful. Three participants emphasized its importance and how it assisted them in knowing which training courses to take. Hoai mentioned, "Yes, I knew which course I have to take as . . . mandatory," while T highlighted that it was "helpful because sometimes we probably forget something and this time, no." E emphasized that the checklist helped to identify potential gaps:

[W]hen I thought I had finished all my onboarding stuff and I e-mailed HR to say, 'Hey, I think I've done all my onboarding stuff,' they were, like, 'No, you had missed a couple things,' and so it was my misunderstanding of what those other things were.

Tiffany felt that the checklist was a great foundation and appreciated the information: "It was helpful just to be able to go through everything, and then know when you're finished that you've done everything that's been laid out for you, so . . . you're at a good starting place to get going." Jane did make note of some delays caused by the checklist: "Everything takes, like, an overnighter thing, so I think in my situation, . . . HR was, like, two days behind processing a few reports." There is consensus in the data presented that the information provided in the checklist (compliance, training, setup) did help individuals with the transition into a new institution and role. There were, though, some potential issues that emerged, as discussed by Jane, due to the way in which the institution utilizes the checklist to support the process of getting a new employee set up.

The second main way in which the university ensures compliance is through a new employee orientation workshop. The new employee orientation is intended to provide "new employees with the basic information they need to thrive at the university" (University of Calgary, 2021b). Eight of nine participants attended the new employee orientation, with three expressly stating that they found it beneficial, as emphasized by Hoai: "Oh yes, I got a lot of information on that day." Additionally, most participants highlighted the discussion of benefits, payroll, and union information, as well as various other resources; for example, "I think the benefit explanation and the union session" (T), and "The policies and insurance and, yes, so many things; I took note a lot of notes on that day" (Hoai). One of the biggest shortcomings of the new employee orientation session discussed by participants, as noted in the previous analysis

of employee retention, was the absence of foundational information about the university's history, goals, values, and structure. While this highlights a significant gap within the university's onboarding processes, it is outside the purview of the current discussion of compliance, which focuses on basic information such as regulation and policies.

An additional compliance-related topic emerging from the data surrounds the environment and physical space. Four individuals highlighted limitations and gaps in their knowledge and understanding of the physical university environment. Jane suggested that:

[H]aving tours of the university would be helpful. . . . Here is the medical, here [is] where you can go get chiro. There's all these services that, you know, you're allowed to access. Apparently the medical is only for students unless it's an emergency, and if . . . the injury occurred at your office, at your workplace. . . . [T]he dentist is there but it works just like any other dentist, anyone can access [it]. There are, well, food courts, self-explanatory, but here are some other coffee places around the campus . . . .

Unfamiliarity with the campus was also noted by T: "[I had] a map and, yeah, that is helpful, [as] at the first two weeks . . . I got lost everywhere, [then] I always remember[ed] my copy." Further, E and Jamie, both working at satellite sites, spoke of limited supports to help navigate the main campus and a lack of familiarity with the surroundings. Jamie mentioned, "[I'm] not attached to main campus but close to it, and it seems like that's where we work unless we need to go and attend meetings. . . . You just get more familiarized [when you] walk around and go to meetings." E built on Jamie's comments:

I know for me, every time I was going to main campus, even this year, my preference was to go with transit because I was never 100% sure where employee parking was on main campus, and I didn't want to go and park somewhere where I might end up getting a

ticket. So, because I'm not on that campus that often, I think, for me, when I get there,

sometimes it's a little intimidating as to knowing where I have to go. But maybe that

might just be me not going there at all that often, so I don't know how that can be

bridged.

Overall, the data analysis on compliance shows a strong alignment with the literature.

The university provided ample resources to assist new employees as they began their new roles.

The new employee checklist provided information on courses and helped to identify gaps and to

ensure the new employees had not overlooked any steps. The new employee orientation

highlighted important information on benefits, payroll, and union membership. The one

limitation specifically related to compliance that was highlighted by several participants was an

orientation to the physical university spaces. In sum, the university had an excellent compliance

framework that strongly aligned to the literature, emphasized by the many supports and resources

available to new employees, with room for development in the inclusion of more resources in the

new employee orientation session surrounding the physical campus environment as a possible

way to meet the needs of new employees and further strengthen their compliance framework.

Clarification and the University. Clarification provides a new employee with an

understanding of their role and performance expectations, which is needed to be successful

(Maksymiuk, 2017; Ibrahim et al., 2022). This may involve training, or discussions to help

highlight the diverse functions a new employee may be required to perform as part of their new

role (Meyer & Bartels, 2017). Clarification helps a new employee understand job function and

expectations, which can help increase performance, confidence, and satisfaction (Bauer, 2015b;

Becker and Bish, 2021). Looking at the data collected and aligning it to clarification, five

individuals received additional supports outside of the initial onboarding checklist to help them

orient to their new role. Hildegard mentioned digital files: "I had access to all the drives, which was great, and then was given some places to look through for information documents and was basically given some time to kind of orient myself." Tiffany discussed receiving both physical documents and a USB:

> Yeah, so, just trying to think of, I received help documents, physical documents as well as a USB that had files with information that I could go through at my own pace to get up to speed with my department and sort of just standard operating procedures.

> In addition, two individuals spoke of receiving training from colleagues. Tatiana mentioned, "I sat down with one of my colleagues and we just got to know each other a little bit better, and we went over what the expectations were of the role." E highlighted that the discussion focused more on an organizational framework "kind of like orienting me to what our department did, what we were about, who our partners were, the different pillars within my faculty, where we fit in [and] where I fit in."

> The data also highlighted gaps, including discussion around additional supports outside of the onboarding checklist, with four individuals mentioning needing further documents to help support them in their new role. CB highlighted that there was little role-specific documentation: "[A]s far as for my role specifically, there wasn't necessarily a lot of documentation, so, like I said, [I] was maybe a little bit worried." E talked about gaps in document retention:

> I realized that the other person who had been in my role had a very different way of keeping documents and files, so I think when the person retired, most of that information was on the person's desktop and not in the shared drive, so when I was actually doing the work and trying to continue, I realized there was a lot of gaps in the information.

Tiffany noted a lack of connection with those in similar roles throughout the institution:

[S]o even though they are a separate unit, very much of my role is in collaboration with

similar units across the institution . . . so maybe a detailed breakdown of key contacts in

other places at the university, or maybe training that they offer to get you up to speed on

standards for different tasks that are common across units across the university.

This analysis highlights that the university's processes to assist new employees in

understanding their role, and the preparations necessary, are largely successful. Five of the nine

individuals spoke of being provided documentation outside of the onboarding checklist to help

support them in their role. Additionally, two individuals expressly indicated participating in

meetings to discuss organizational frameworks and expectations. This identifies a link between

the onboarding literature and practices at the university. There was some concern expressed by

four individuals who identified a need for further information to support them in their new roles.

Four additional participants did not highlight or discuss any clarifying supports provided to them

as they navigated their new positions. Although I cannot know expressly if those individuals did

receive clarifying supports and chose not to mention them in the interview process, what is

underscored by the data review is an apparent misalignment in university practices around

clarification and best practices discussed in the literature.

Culture and the Alignment to Socialization and Retention. Culture focuses on a new

employee being able to understand organizational norms, values, and unspoken rules

(Maksymiuk, 2017). The quicker an employee can grasp organizational culture and adapt to

workplace norms, the greater the probability for long-term success within the organization

(Bauer, 2015a; Gregory et al., 2021). From the previous analysis of socialization, including

socialization agents and a self-directed responsibility for socialization, it is evident that both of

these are features that influence and help employees to develop a sense of the new organizational

culture. This argument is supplemented by the analysis on retention strategies within the onboarding process. In that discussion, it was clear that both Jane and Tiffany felt that important information about the institution, including policies, procedures, and history, was missing from the new employee orientation process. Additionally, Hildegard highlighted that the university's main focus in onboarding was on process items, such as passwords and benefits.

This analysis emphasizes a strong alignment between the concept of culture and the topics from the literature on socialization and retention discussed earlier. In the examination of those two topics, it became apparent that both highlight mechanisms that are already in place at the university for a new employee to develop a sense of organizational culture (socialization agents, for example), as well as perceived gaps that warrant further exploration, for example in the lack of communication around foundational institutional information and a sense of process over culture in onboarding practices.

Connection and the Link to Socialization. The connection phase of onboarding refers to both the formal and informal ways in which an employee develops relationships within the organization (Meyer & Bartels, 2017). These relationships are important in that they provide a critical resource for the employee as they encounter challenges within their role (Bauer, 2015a). Connection is a vital part of onboarding, helping a new employee to develop and maintain success in their new role (Walker-Schmidt et al., 2022). Organizations can assist in the development of connection in many ways; for example, by assigning onboarding buddies, having timely check-ins (Bauer, 2015a), introductions to senior leadership, or even taking an employee out for lunch on their first day (Meyer & Bartels, 2017).

As we saw previously with culture, there is significant overlap between connection and socialization as understood in the onboarding literature, including the appointment of onboarding

buddies, facilitated introductions to team members, and the use of socialization agents to help understand the role and the organization. As these topics were already examined in the earlier discussion of socialization, I have taken them into consideration as part of my analysis but will not reiterate them here.

There were several additional conversations and personal reflections in the data that strongly aligned to the topic of connection. These discussions do not follow any specific grouping but instead focus on the personal reflections of individuals related directly to the topic of connection.

Tatiana spoke of systems being put in place that could provide a bridge to the development of relationships and connections for a new employee:

> What I would do is have that support system, when someone does come onto the job, where they get the accurate training for the job role . . . . If I'm starting that role, I think it would be best to have someone there who knows that role and who knows what's expected of that job . . . . It's good to have someone sit next to you and kind of show you and help you along the way and someone that you can actually talk to when you do have questions and ask them.

CB suggested building in opportunities for a new employee to meet, both formally and informally, co-workers and other important contacts within the organization.

> I think maybe one thing that would be helpful would be sort of the ability for managers or for a co-worker to do things like, you know, buy coffee or buy lunch, or set up meetings for people . . . as opposed to maybe necessarily relying on [an] outside event happening to get people to meet other people. . . . I guess I just, you know, setting up coffee dates for people to talk, setting up lunch meetings with the various groups and different

departments, you know, maybe specific events for new employees, . . . for people to socialize with them . . . .

Hildegard reflected on the potential for onboarding to be more focused on relationship-building, instead of the perceived focus on process:

[I]n any other role I've onboarded with it's, like, 'Welcome, we're so glad to see you, let's get you engaged with your co-workers, here's your project team. . . . [M]ore the people side of things instead of the process side of things.

Alongside the previous analyses of socialization and culture, these reflections emphasize the university's strengths in some aspects of helping employees to build connection within the university, as well as several potential areas for development. Strategies such as onboarding buddies, facilitating introductions, and the use of socialization agents are strongly aligned with established best practices from the literature. Conversely, the additional reflections around connection again reveal there may yet be some gaps. Tatiana spoke of the need to develop a support system, CB highlighted a limitation in the ability to socialize with teammates in a formal yet informal way, and Hildegard discussed how university onboarding seemed to focus mostly on process. While all three individuals did point to potential gaps in the connection dimension, there was no unifying agreement among the discussions and none of the six additional participants explicitly provided comments that would align with building connection through the onboarding process. As we've seen with other elements of onboarding processes and practices at the university, the data suggests the university does implement some strong connection practices to help new employees build relationships within the institution, and points to potential ways the onboarding process could be enhanced to more fully meet the needs of new employees.

The Experiential Learning Cycle and Onboarding

A secondary analysis of the onboarding data was conducted through the lens of the experiential learning cycle. Experiential learning theory offers further insights into the onboarding process through its focus on onboarding as fundamentally a learning experience, and its ability to support observation of and reflection on the development of specific practices and new skills (Kolb & Kolb, 2017). This secondary analysis provides context for and helps explain why specific elements occurred within the data.

The experiential learning cycle consists of four stages: concrete experience (the initial learning experience), reflective observation (review and reflection), abstract conceptualization (analysis and planning), and active experimentation (replication of the learning) (Kolb & Kolb, 2017; Learning Theories, 2017; McLeod, 2017). Once a learner has navigated the four stages of the cycle, effective learning is believed to have occurred. One of the key elements of the experiential learning cycle is the reflection on the learning experience (Sharlanova, 2004). If an individual does not reflect on the learning experience, they are at risk of making "the same mistakes over and over again" (Sharlanova, 2004).

This analysis of the significance of the experiential learning cycle in onboarding was completed holistically through an examination of the analysis of onboarding through the lens of the relevant topics identified in the literature. The analysis was approached in this way to account for the data's significant focus on participant reflections and perceptions about the onboarding process. The data collected does not focus on discussions about specific skill development, or how skill development could be improved. There are, however, some considerations that emerged from the data that lend themselves to a discussion of onboarding in the context of the experiential learning cycle.

Pre-planning, Compliance, and the Experiential Learning Cycle. Two topics within the onboarding literature, pre-planning and compliance (one element of the Four C's of onboarding), position well together when looking at their alignment within the experiential learning cycle. Both pre-planning and compliance focus on the basic elements, policies. and information a new employee needs as they navigate a new position (Maksymiuk, 2017). This information can be understood as foundational and required for a new employee to be able to begin in their role. Pre-planning and compliance must occur prior to an employee starting within an organization and cannot be circumvented. Therefore, these elements of onboarding are considered to be separate from the experiential learning cycle and this analysis of its relationship to onboarding. Although some elements, such as regulations and policies, (Meyer & Bartels, 2019) certainly have a foundation in knowledge acquisition, related activities and processes have an important but different focus than that of learning new skills and developing methods to succeed within an organization.

The one element of pre-planning and compliance that may have an impact on an individual's knowledge acquisition, and by extension the analysis of the experiential learning cycle and the data collected, is the framing of these topics within the onboarding experience. The pre-planning and/or compliance stages within onboarding are often a new employees' first introduction to an organization (Friedman, 2006). This is when a new employee will begin to understand, at least initially, some information about the new organization. This may be through a welcome e-mail with information needed to prepare for the first day, or an onboarding checklist to help organize training. These elements help to frame a new employee's first impressions of an organization. In this way, some elements of the pre-onboarding and compliance processes help to form a foundational experience upon which elements of the

learning cycle may be built. While these processes may not be part of the formal experiential learning cycle, they do provide essential basic information on which onboarding process can be established. I used this lens in the analysis of the remaining topics on onboarding and their relationship with the experiential learning cycle.

The Experiential Learning Cycle and Relevant Topics on Onboarding. When looking at the experiential learning cycle and its relationship to the remaining topics on onboarding, a different lens must be engaged. The previous analysis of relevant topics within the literature and their alignment to the research data focused directly on situational information as well as interview participants' thoughts and perceptions of specific circumstances. This provided an opportunity for a robust and thorough analysis of the interview data and its relationships with the topics in the onboarding literature. For the purposes of this analysis of the relationship between the relevant topics in the onboarding literature and the experiential learning cycle, a wider scope was engaged that did not focus on the situational data as described within the interviews, but rather on the larger topics and their relationship with the experiential learning cycle. Analysis of the experiential learning cycle could not have been undertaken prior to the data collection and subsequent analysis, because the data as presented within the literature identified the best practices or ideals of onboarding. Yet this information alone did not provide a view of or positionality to the specific lens of onboarding at the university among unionized administrative and professional staff and, therefore, would not have yielded findings localized to this specific context. Additionally, until the initial analysis of the data was conducted, I did not feel I had enough understanding of the overarching subject matter around contemporary onboarding topics to accurately discuss the experiential learning cycle and its relationship with onboarding.

When examining the relevant topics present within the literature in the context of the data collection, and taking into consideration the previous discussion of onboarding, three key areas of particular relevance to the experiential learning cycle emerged: socialization, retention, and three of the 4 C's of onboarding. As a reminder, socialization focuses on organizational fit and an understanding that a well-socialized employee will perform better within an organization (Bauer et al., 2012). Retention strategies look to build organizational strategies that engage new employees in different processes (goal-setting, career development), with the purpose of encouraging growth, development, and longer-term continued employment with the organization (Gruzd, 2011; Davis, 2015). As discussed earlier in this chapter, both socialization and retention find themselves strongly situated in the 4 C's of onboarding, specifically aligning with culture and connection. For the purposes of this discussion, I group elements of socialization and retention into the discussion of culture and connection to more strongly capture these areas in the larger examination of the experiential learning cycle.

In reviewing the literature on the 4 C's of onboarding, one of the key elements discussed is how each of the 4 C's (compliance, clarification, culture, and connection) may be understood as different levels within the onboarding process, with compliance at the base, covering the most foundational aspects of onboarding (Bauer, 2010). Further, if an onboarding program has integration of all four C's, the result is believed to be a highly integrated onboarding experience that would prepare a new employee to be successful within an organization (Bauer, 2010). The implication, as evident within the discussion in the literature highlighted in Chapter 2, is that each level is built and developed based on some level of completion or mastery of the previous level. This is further supported by the assertion that not all organizations integrate all levels of the 4 C's into their programs, with most being able to achieve only compliance and possibly

clarification (Meyer & Bartels, 2017). Initially, I also understood these levels as being linear, with each area building on the previous area. However, once I explored the 4 C's through the lens of experiential learning theory, alongside the discussions highlighted in the research findings, my perspective began to shift.

One of the key elements of the experiential learning cycle is that the cycle is continuous, with no set entry point, though the phases need to be completed consecutively in order to ensure understanding of new learning (Sharlanova, 2004). As such, previous experience may allow an individual to start at a different stage within the experiential learning cycle, perhaps abstract conceptualization or even active experimentation (Sălăvăstru, 2014). Similarly, perhaps individuals with previous relevant onboarding experiences may be able to start at different points in the onboarding process. Hildegard, for example, previously worked at the university, and while their new position was within a different employment classification, a number of elements, such as the new employee orientation and the onboarding checklist, had a fair amount of overlap with the previous position:

> I did use the onboarding checklist and, like I say, because it hadn't been my first time at the university, it was familiar to me, and several of the items had already kind of been taken care of in terms of registering for the health and safety program and that kind of thing. Those had already been done.

Further, CB, E, Hildegard, Hoai, and Tiffany all highlighted in their interviews previous onboarding experiences that stood as benchmarks against which to compare the onboarding they received at the university. These individuals were not new to the idea of onboarding, and could draw on previous knowledge and understanding from other organizations to assist them in their new onboarding experience.

The use of previous knowledge to help navigate the experiential learning cycle is a foundational tenet on which the cycle is built (Sălăvăstru, 2014). It allows learners to enter the cycle at different stages and helps them to identify specific learning deficits (Sălăvăstru, 2014). Significantly, extending the tenets of the experiential learning cycle to a new onboarding experience offers a new lens through which to view onboarding.

The literature on onboarding identifies key topics that help an employee successfully navigate a new organization. The various topics focus on developing the benchmarks and processes that help all employees acquire the skills and knowledge needed to be successful in their new role and in the organization. Viewing onboarding through the lens of the experiential learning cycle forces consideration of prior knowledge and experience, which can significantly change the nature and design of specific elements of the onboarding process. If an individual has prior knowledge related to a certain topic, this will change the amount of support or even the nature of support an organization would need to provide in that area. The experiential learning cycle highlights the need to take prior knowledge and experience into consideration when designing onboarding programs.

Summary

This chapter presented the research findings identified from the data collection process, through the lens of the key research questions guiding this study.

The data was first coded, organized, and presented based on commonalities within the findings to highlight various themes present within the data. I then analyzed the data based on the relevant topics identified within the literature on onboarding. This was done to determine if alignment existed between the topics highlighted in the literature and the onboarding experience at the university. This analysis highlighted both processes that strongly aligned with the

literature, as well as gaps and areas for improvement. A secondary analysis of the data through

the lens of the experiential learning cycle highlighted the potential for using past onboarding

experiences to help develop and shape new onboarding programs.

CHAPTER 5: Discussion and Recommendations

Overview

The purpose of this research study was to understand if a large, research-intensive university in western Canada provided unionized administrative and professional staff with the knowledge and skills needed to successfully integrate into the university environment. The research study also investigated the processes, resources, and supports provided to participants, and the impact these materials had on the integration of participants into their role at the university. The findings of this study identified several areas of successful integration, along with significant opportunities to strengthen integration practices at the university.

This chapter expands on the research findings to elaborate on topics identified within the data analysis process. This will help to further identify successful areas of integration through current university practices, as well as opportunities for discussion on how to address gaps. What follows is a series of recommendations that holistically review the research findings and data analysis to detail ways in which the university can modify and adjust existing practices to better meet the needs of new employees. Finally, I suggest a number of additional research opportunities that offer ways to continue exploring the data from this research study to arrive at a more fulsome review and understanding of onboarding practices at the university.

Discussion

Pre-onboarding for New Employees

One of the main themes present within the data analysis focused on the pre-onboarding process, understood as the important steps an employer must follow to prepare a new employee for their first day (Kumar & Pandey, 2017). Pre-onboarding ensures an employee receives appropriate information about the organization and helps to develop a connection with the

organization prior to their start date (Bhakta & Medina, 2021). In reviewing the research findings and data analysis on the pre-onboarding process, there was a large discrepancy in the information provided by research participants. Six participants spoke of receiving information and resources, including links to set up their IT accounts and information around supports, courses, and training to prepare for their first day. This aligns well to best practices in pre-onboarding as identified in the research around pre-onboarding and supports these participants' ability to psychologically transition into a new organization while ensuring they have an understanding of and alignment to organizational norms (Kumar & Pandey, 2017). By contrast, three research participants highlighted a lack of information or resources to support them in preparing for their first day. One participant highlighted the feeling that everything seemed rushed, while another stated they had information about benefits, but nothing to prepare them for starting work on their first day. These reflections indicate a possible gap in pre-onboarding practices at the university. For the employees that received no supports, their reflections and further discussion emphasized feeling a lack of preparedness, which speaks to the central role of pre-onboarding in supporting new employees to quickly integrate into organizational norms, build capacity and more rapidly contribute to the organization (Chillakuri, 2020).

Looking holistically at the pre-onboarding process at the university, there is some alignment to the topics and themes discussed in the literature, specifically in underscoring how a pre-planning process helps new employees feel a stronger sense of engagement with the organization and their role (Savitt, 2012). This is highlighted by the six participants who did receive supports. These individuals discussed feeling more prepared, including having a good overview of the university and different resources they could access and individuals they could connect with for help and support as they began adjusting to the university environment. The

three individuals who did not receive pre-onboarding materials, on the other hand, all felt

unprepared for their first day and alone in navigating their initial journey into the organization.

These perceptions stand in contrast to the purpose of pre-onboarding as a way for new

employees to feel welcome and prepared for their first day (Pike 2014).

In further reflecting on the contextual factors that prevented some participants from

gaining necessary pre-onboarding information, two of the individuals highlighted that they were

hired very quickly to fill gaps within their departments, with one noting that everything seemed

rushed. Further research and data collection is necessary to identify to what extent these

contextual factors influenced the onboarding experience of the two participants. What is clear

from participant reflections is that the university does have pre-onboarding supports, developed

to help new employees gain important and appropriate information to help prepare for their first

day, but that potentially, depending on specific contextual factors, some of these elements may at

times be missed for some new employees.

Socialization Agents at the University

As we've seen, employee socialization has an important role in the onboarding process.

Organizational socialization can be understood as new employees gaining the knowledge and

skills needed to be successful within the organization (Baldwin, 2016). This recognizes that a

well-socialized individual can perform better (Bauer et al., 2012). There are many ways in which

organizations may engage with employees to support socialization (Wiseman et al., 2022). In

reviewing the research findings and data analysis on socialization within the university context, a

strong alignment with best practices in socialization emerges. Seven of the nine participants

indicated that they were greeted by their managers on the first day, with all nine participants

being introduced to fellow colleagues within their departments. This highlights support for

socialization, specifically around departmental and organizational culture, allowing these employees to gain key knowledge in a timely manner (Ellis et al, 2015). In addition to being introduced to other employees within their departments, five of the participants indicated that they were assigned an onboarding buddy – a colleague who assisted with socialization by answering questions and helping with tasks to support them in navigating the new work environment (Graybill et al., 2013). Many of these participants felt that being assigned a buddy helped to support integration into their new role. In clear alignment with organizational socialization processes detailed in the literature, all nine participants felt supported by the organization as they began navigating the socialization process.

The data analysis points to the university's strong alignment with organizational socialization processes, including socialization agents, onboarding buddies, and opportunities to meet and interact with various departmental contacts. However, in looking at the second component of socialization, individual socialization, through the lens of the research findings and data analysis, some potentially significant concerns emerge. Individual socialization recognizes that an employee is primarily responsible for their own personal socialization (Klein et al., 2015). While an organization is responsible for ensuring a new employee is supported in their role and in developing relevant connections for success in it, the new employee must navigate and develop their own socialization process, advance interpersonal relationships, and adapt to the organizational workplace culture (Korte, 2007). In reviewing the research data, five individuals revealed they struggled to navigate their own personal socialization. These individuals identified a lack of clarity around who to turn to with questions, feelings of being bothersome to colleagues, and challenges with team engagement as reasons for struggling through personal socialization. Korte (2007) expressed relevant concerns in this context with organizations

yielding ownership of the socialization process to employees, as that often overlooks various "social and systemic influences" (p. 2). The research data indicates a misalignment in this regard among individual socialization practices within the university. This may be due to a lack of clarity around the new employee recognizing responsibility for navigation of their own personal socialization. When looking at individual socialization, it appears that the university may be yielding ownership of the socialization process to new employees without appropriate measures or supports to ensure success (Korte, 2007). To better support new employees, the university might consider looking to create opportunities to engage with individuals more explicitly and fully as they navigate their own individual socialization process.

Onboarding and Retention

Retention can be understood as developing happier, more adjusted employees who are more likely to want to remain with an organization (Nobel, 2013). As discussed in the data analysis, the research findings of this study do not indicate a strong alignment between best practices as elucidated in the literature and the university's approach to retention. Only in participants' reflections around engagement and identity, admittedly two key elements within retention literature, do we see any correlation with onboarding and retention at the university (Nobel, 2013; Morgan et., al, 2020).

Organizational retention strategies identify strategic opportunities for the dissemination of information around career growth and advancement, helping new employees better understand their potential for long-term alignment with and success in the organization (Davis, 2015). One of the key ways in which organizations can emphasize organizational retention is through discussion of organizational goals and objectives (Grudz, 2011). Throughout the interview process, the research findings, and data analysis we've seen that participants identified gaps in

their understanding of organizational goals and objectives. Several individuals felt there were obvious limitations within the new employee welcome session, where discussion of university history, campus organization, university structure, and different governance processes, was notably absent. This highlights a gap between experiences at the university and organizational retention best practices, a missed opportunity to introduce retention concepts and conversations into the onboarding process, to help employees understand the vision of the organization and the skills and talents they bring to it (Davis, 2015). As the literature highlights, it is never too early to initiate discussions with a new employee around the process of career development in the context of organizational objectives. This process recognizes the two-way commitment between an employer and employee to help meet the goals of both (Caldwell & Caldwell, 2016).

In reviewing the evidence of retention strategies within the university's onboarding program, it is hard to identify definitively whether there is alignment to the literature around onboarding. One key reason is that the interviews conducted for this research study did not explicitly ask individuals about their thoughts and perceptions around retention, or whether they identified any specific gaps or limitations in that regard. The other, less tangible, element is that as new employees at the university, employed for less than one year, participants may not have had an opportunity to consider what retention strategies and career development might look like for them. What can be observed more conclusively, based on feedback about the new employee orientation, is a perceived gap in information surrounding organizational goals and objectives, something that appeared in multiple reflections throughout the participant interview process.

Linking the Four C's to the University

The Four C's of onboarding speak to important considerations within the onboarding process. The first C, compliance, as discussed by Bauer (2010), is understood as the lowest level

of onboarding, dealing primarily with "basic legal and policy-related rules and regulations" (p. 2). Clarification is the second C in the process, providing new employees with information and understanding of job-related expectations (Meyer & Bartels, 2017). The third C, culture, provides a new employee with information about the organizational culture and norms (Bauer, 2010). Through the final C, connection, employees develop relationships within the organization that enable them to be successful in their role (Meyer & Bartels, 2017). As previously noted, integration of all four C's within an onboarding program has been shown to help employees develop the necessary skills and tools needed to be successful within the organization (Bauer, 2010).

In looking at the first two C's in the context of the university onboarding experience, based on the research findings and data analysis, it is evident that there is some alignment with and integration of compliance and clarification, but that gaps also exist. There were many conversations and reflections around participants being provided with resources on how to successfully navigate their start at the university, including information on benefits, an onboarding checklist, new employee welcome session, and also opportunities to meet with the manager and other employees within the department. This aligns strongly to the literature on compliance, in providing employees with initial tools needed to navigate their onboarding experience, as well as clarification, in providing an employee with the necessary information for them to be able to perform their role (Maksymiuk, 2017). There were, however, several reflections that recognized a gap in some of the documentation provided, limiting the ability to navigate some work duties. This observation is also noted in discussions around pre-onboarding and socialization. These reflections highlight some of the limitations within university structures, processes, practices around compliance and clarification, specifically in providing the tools

needed for a new employee to be successful within their role (Bauer, 2015b). Again we see potential opportunities for further development to help employees successfully navigate their roles.

In the context of culture and connection, and their relationship to the university onboarding experience, the research findings and data analysis show a misalignment between research participants' reflections and best practices observed in the onboarding literature. Culture can be perceived as cultivating an understanding of organizational norms, values and vision to help increase the likelihood of success for a new employee (Bauer 2015a). Reviewing participants' reflections as identified in the previous discussion around organizational socialization, many felt there was a lack of clarity around institutional policies, governance, and history, highlighting a gap between the information new employees received and what they felt was necessary to better understand the university and its culture. One participant specifically emphasized feeling that the university was strong in meeting fundamental elements around getting an individual set up to function in their role, but lacking in supporting the employee's further integration into the university community.

Similarly, participant reflections on connection highlight that some fundamental information and opportunities to connect were communicated to participants, including through meeting with colleagues and the use of onboarding buddies, aligning to the literature in building employee resources that will help them to navigate challenges they encounter (Bauer 2015a). However, three participants highlighted feeling that, while there was strong emphasis placed on building formal connections, there were no processes in place to help strengthen informal and interpersonal connections. One participant suggested a strategy of enabling opportunities for managers and colleagues to take new employees for coffee or lunch, while another participant

talked about a stronger emphasis on connection and role building generally. The review of the research findings and data analysis in this context indicates a gap in the university's process for encouraging interpersonal connections and relationship building within the onboarding process, and room for further consideration for development.

This discussion of the Four C's highlights that the university does have some processes currently in place to help support new employees as they start navigating their roles, and that further resources and tools are needed to provide more fulsome support to new employees.

Prior Knowledge and Onboarding

Experiential learning recognizes that knowledge is developed through a process in which an individual creates meaning from actual experiences (Yang et al., 2021; Gencel et al., 2021; Trongtorsak et al., 2021). In this conception, an individual will attach meaning to a real-world experience, allowing them to create knowledge and acquire skills (Trongtorsak et al., 2021). This process is best explored through the four stages of the experiential learning cycle – concrete experience, reflective observation, abstract conceptualization, and active experimentation (Yang et al., 2021; Patil et al., 2020). Concrete experience focuses on the actual experience; the time, place, and the mechanics (Gordon, 2022). Building on concrete experience, with reflective observation an individual contemplates the experience. This is the stage in which an individual is searching for meaning (Gordon, 2022). During abstract conceptualization, an individual looks to create connections between the experience and prior knowledge, towards developing a hypothesis or understanding (Gordon, 2022). Active experimentation is where an individual learns through action, exploring ways in which to replicate an experience (Gordon, 2022). This four-stage process can be understood as a "spiral of continuous learning" (Gordon, 2022, p. 5), in

which a learner can begin knowledge development and acquisition at any stage, recognizing prior experience and familiarity as important elements.

Reviewing the participant information and onboarding literature through the lens of experiential learning helped to identify that prior knowledge could be relevant in helping new employees navigate the onboarding process (Sălăvăstru, 2014). This recognizes that, in experiential learning theory, knowledge acquisition emphasizes the process of understanding and forming meaning through a method of examination, analysis, and integration of already existing ideas and determining alignment with new processes (Gencel et al., 2021).

When looking at the onboarding data and its positioning within the experiential learning cycle, there is evidence that further integration of prior onboarding knowledge could be considered within the university's onboarding program. The research findings indicate that five participants referred to or used information from prior onboarding experiences to compare and frame their onboarding experiences at the university. This highlights a potential opportunity to integrate participants' familiarity with some onboarding processes and a potential opportunity for further integration within into current onboarding practices. Additionally, when looking at experiential learning through the lens of the onboarding literature, further links to processes around socialization, also strongly linked to the C of connection, emerge. One of the ways in which knowledge acquisition occurs within experiential learning is through collaboration, observation, and interaction (Colognesi et al., 2020; Trongtorsak et al., 2021). This helps individuals develop knowledge through participation, and gain further support within the learning process through opportunities for conversation and consideration of various viewpoints (Trongtorsak et al., 2021). This resonates strongly with social constructivism, which recognizes knowledge development as being a social process, and aids in strengthening the link between

experiential learning and onboarding processes at the university (Patton & McMahon, 2021). In social constructivism, knowledge is constructed through experiences and interactions with others (Omodan, 2022). Using this as the foundation on which to understand knowledge acquisition and socialization processes, we can see that everyone will have a unique experience in which they will assign meaning and value in different ways (Omodan, 2022). Social constructivism thus links to the notion of leveraging prior knowledge within the onboarding process in several ways, including: interaction (Agopian, 2022), mentorship (Trongtorsak et al., 2021; Colognesi et al, 2020) and feedback (Colognesi et al., 2020) – all processes within social constructivism that emerge as potentially important elements that could be integrated into onboarding processes to accommodate consideration of prior knowledge during onboarding.

This discussion of experiential learning illuminates significant opportunities for further exploration of potential ways in which to integrate prior knowledge relevant to onboarding into current practices at the university. Such integration may also help to address further development and enhancement of other areas within the onboarding process, including socialization (Hillman, 2010) and connection (Bauer 2010).

Onboarding Recommendations

These recommendations were developed through a review of the data analysis, research findings, and the preceding discussion. The recommendations provide insights into how the university can address gaps identified within this study to enhance their onboarding program. These suggestions I believe, based on the findings of this study will help the university design better supports to assist new employees as they engage in their roles. Additional groups that may be interested in these recommendations include current onboarding practitioners and researchers, and current, past, and future employees at the university.

Strengthening of Pre-onboarding Processes

Pre-onboarding, understood as "pre-employment onboarding" (Bhakta & Medina, 2021, p. 169), is the process in which organizations prepare a new employee to begin their new job (Bhakta & Medina, 2021). New employees gain information about policies, regulations, and other relevant information needed to prepare for their role (Ibrahim et al., 2022). Current university structures highlight a gap in ensuring all new employees are given relevant information and detailed communications on how to prepare. The data shows that the documents and information are present within the university but that significant inconsistencies exist in the ways they are communicated. The creation of a more standardized process in which individuals can access this information is key. Development of this process would help to build engagement with the organization prior to the employee starting at the university (Varshney, 2022), and ensure that all new employees feel better connected to the organization and prepared to start employment (Bhakta & Medina, 2021). This process may take different forms, including engaging a pre-onboarding mentor (Bhakta & Medina, 2021) to connect with employees prior to their first day (Varshney, 2022), among others. Enhancing pre-onboarding processes, communications, and resources will help ensure new employees have the information needed to prepare for their first day, and feel more engaged with and connected to the university.

Expanding the New Employee Welcome

The data suggests that enhancement and expansion and of the new employee welcome session would strengthen onboarding at the university. The overall goal of an onboarding program is to help a new employee gain the information needed to effectively contribute to the organization (Bell, 2021). New employee orientation sessions are designed to give new staff members important information about the goals, values, and history of an organization to help

new employees better integrate and socialize into the organization and their role (Njoku & Eseitonghe, 2022). Based on the research findings, current new employee welcome sessions contain important information about benefits, the employee union, and some basic information about the university. Study participants indicated information around the history, background, and governance of the university, including information on university decision making and faculty structure, would be beneficial in assisting them to better integrate into the organization.

Further insights from participants indicate that the inclusion of information on the university campus, and how to engage with various university services, including medical, restaurants, and coffee shops, for example, would better support employees in navigating their campus experience. Additional consideration of and information on satellite campuses would also benefit individuals who work at other university locations. Strengthening the new employee orientation session would help new employees gain a better understanding of the overall structure and goals of the university and how their role fits within the organization, and to feel more comfortable starting out at a large institution with multiple campuses.

Relationship Building

Relationship building is understood as activities created with the aim of developing interpersonal connections between new employees, the organization, and colleagues to increase opportunities for information sharing and networking (Petrilli et al., 2022). This acknowledges that employees are not solely responsible for their socialization experience and need to rely on different supports and structures that have been purposefully designed to help promote interpersonal connection (Klein et al., 2015). In this study, relationship building was identified as lacking clarity, limited, and not fully developed within the organization. Some participants struggled to navigate interpersonal relationships and indicated this created some limitations

within the onboarding program. Relationship-building processes can take many forms, including mentorship (Luckenback & L'Ecuyer, 2022), networking opportunities (Jenkins et al., 2020), and other informal opportunities including coffee or lunch with supervisors or colleagues (Bhakta & Medina, 2021). Encouragement of these types of activities can help new employees experience more job fulfillment and better performance (Badsha & Bulut, 2020). By identifying relationship-building activities that align with the university's values, goals, and structure, the organization could create engaging opportunities for new employees to connect with colleagues and build contacts. There are various forms this could take. Faculties and units on campus could be engaged in the development and implementation of new ideas and protocols, with the intent of helping new employees, hiring managers, onboarding coordinators and colleagues to identify relevant ways in which to expand the focus on relationship building.

University Goals and Objectives

The research findings and data analysis identified a gap in understanding around university goals and objectives. Onboarding programs are designed to give new employees the knowledge they need, through communication of goals, vision, values, and processes, to enable them to successfully engage with the new organization (Ortiz, 2023). This includes offering new employees opportunities to understand organizational expectations and their role in achieving objectives (Njoku & Eseitonghe, 2022). The design and development of important resources highlighting the goals and objectives of the university would help new employees get a better sense of organizational values. This may help new employees to identify alignment between their role and ways in which they can better engage with the university. Organizations must not assume values and objectives can be readily accessed and understood (Petrilli et al., 2022). The new employee welcome session offers one place for further and purposeful integration of the

university's goals and objectives. Other options may include development of the corporate website to more clearly define the university's goals and objectives, or a brief pamphlet (hard copy and/or digital) that each new employee receives when they start at the university. Intentionally addressing ways to strengthen understanding and increase alignment with university goals and objectives will help new employees achieve greater success within their roles and the organization.

Enhancing IT Setup

IT setup was identified by multiple participants as an issue of concern within the onboarding process. Individuals identified not having IT access, a work computer, or building access for extended periods of time. One barrier to employee success is a lack of appropriate tools or equipment to successfully complete tasks (Scott et al., 2021), including items such as computers, company access, e-mail setup, parking permits, and office equipment (Blount, 2022; Scott et al., 2021; Bhakta & Medina, 2021). This study points to a need to identify opportunities to streamline processes, to ensure individuals have relevant access on their first day. Training requirements and technology needs can be identified as part of the pre-onboarding process, ensuring appropriate access and training are available when a new employee begins (Campuzano, 2022). While full access to all systems prior to commencement may not be possible for all security functions or staffing levels, bridging options could be developed, including temporary computers with appropriate access set-up, guest access cards to allow individuals the ability to enter relevant buildings, or other alternatives depending on work function that would allow individuals to engage more fully in work from their first day. These solutions may help to eliminate barriers perceived and experienced by the new employees in this

study, and allow new employees generally the ability to more quickly onboard into the

university.

Recommendations for New Employees

Onboarding encompasses the formal and informal practices that help individuals gain the

knowledge and skills needed to succeed in a new role (Frogeli et al., 2023). This recognizes that

successful onboarding most often requires active support and detailed planning (Kopko &

Griffin, 2020). Often organizations assume that onboarding programs will provide a new

employee with all the knowledge needed to be fully operational within the organization and their

role (Cuaron et al., 2020). I have identified some key recommendations to support employees in

mitigating limitations or shortcomings in an organization's onboarding process where necessary,

and navigating the onboarding process more effectively overall.

New employees could benefit from greater understanding of their own responsibility for

navigating their socialization experience, including connecting with individuals, being proactive

about asking questions, and identifying ways to build interpersonal connections. Certainly, as

we've seen, the employer also needs to be attentive to and engaged in enabling and encouraging

opportunities for formal connections, such as onboarding buddies, and informal connections,

perhaps through coffee breaks and lunches. For a new employee, though, understanding the

importance of navigating their own socialization experiences will position them well to be

successful within the university. This includes engaging in their own due diligence to prepare for

their first day. The university is a large organization with many different faculties, units, and

locations. New employees can benefit from the pre-work of researching university history,

understanding organizational structures, and getting ready to traverse campus. Being prepared to

begin the first day will help new employees better integrate into the culture and environment of the university.

A final recommendation for new employees is to anticipate delays in the onboarding process and identify ways in which to be productive within their new role. There are many factors that can create delays in the onboarding process. As a new employee, identifying opportunities to become productive can help to minimize the impact delays have on engaging in a new role. Some ways to support new employees who may experience delays might include meeting with team members, reading organizational documents, and volunteering to support the tasks and activities of others. In identifying ways in which to be productive, new employees are providing support to the organization through their actions and behaviours, garnering an early sense of engagement, productivity, and connectedness.

Future Research

As discussed, there are distinct limiting factors to this research study that may have influenced the research findings. This study engaged university unionized staff members who had worked at the university for one year or less. These individuals represented various faculties and administrative units with their own distinct onboarding documents and supports. Further research is required to gain a more holistic understanding of onboarding practices at the university, both within the union staff group under investigation and more broadly in relation to the two other staff groups at the university. These groups are: management and professional staff, who are non-unionized staff members who typically act as high-level university support specialists or managers of individuals in the unionized staff group (University of Calgary, 2021); and academic staff, who are professors, instructors, and high-level academic administrative professionals, such as deans, who are members of the faculty association of the university (The

Faculty Association of the University of Calgary & The Governors of the University of Calgary, 2022). These two groups may bring different perspectives, insights, and impressions around their onboarding experiences, and would provide further relevant information to better inform a fulsome understanding of onboarding practices at the university.

Another important area for future study on onboarding concerns the transition to virtual onboarding practices. The COVID-19 pandemic caused many workplaces to shift to virtual work. Many individuals had no face-to-face contact with new employers during this time, navigating all elements of onboarding, from recruitment to interviewing, and through pre-onboarding and sometimes well into the onboarding process, completely virtually (Jeske & Olson, 2022). Through this transition, many new employees missed out on the interpersonal communication and engagement that occurs during the recruitment and onboarding phases (Bhakta & Medina, 2021). Additionally, working virtually creates limitations on a new employee's capacity to develop connections and properly socialize into a new organization (Scott et al., 2021; Carlos & Muralles, 2022). Recognizing that designing the elements to make a successful virtual onboarding program will have a significant impact on new employees (Varshney, 2022), current discussion around virtual onboarding focuses on the development of an intentional program that looks to achieve similar goals to in-person onboarding programs in unique ways (Campuzano, 2022). There are ways in which virtual onboarding programs can develop community and camaraderie, through actions both formal and informal that hasten the socialization experience (Scott, et al., 2021; Bhakta & Medina, 2021; Petrilli et al., 2022). A research study looking at onboarding practices through the impressions and experience of employees who started work during the COVID-19 pandemic may illuminate different ways in which participants engage in remote onboarding experiences, and relevant insights or practices

for remote onboarding generally, in a world of growing remote work, as well as, perhaps, for traditional face-to-face onboarding.

An additional area for future research, highlighted by a gap revealed in this study's findings, is the connection between onboarding at the university and retention. As we've seen in the literature, there is a strong link between employee onboarding and retention (Bell, 2021), with retention being ultimately one of the main purposes for onboarding (Badshah & Bulut, 2020). High-quality onboarding experiences help to foster connection and engagement with an organization, which increases retention (Walker-Schmidt et al., 2022; Blout, 2022; Becker & Bish, 2021). Individuals transitioning into new roles without appropriate onboarding may struggle due to cultural differences among organizations, which can adversely affect retention rates (Young-Brice et al., 2022). Given the critical role onboarding can play in retention, supplementary research around this link may generate additional insights into the current effectiveness and potential of onboarding programs at the university. Similar considerations may also be warranted for other elements of the employee life cycle (Walker-Schmidt et al., 2022), including career development (Kennedy, 2023) and succession planning (Malokani et al., 2023).

Identifying ways in which to integrate prior knowledge and experience into university onboarding practices is a key area for further investigation. In exploring the data gained from this research study through the lens of experiential learning, insights around knowledge acquisition and skill development emerged (Gencel et al, 2021; Trongtorsak et al., 2021). This recognizes that knowledge creation and skill development are constructed through experience, based on making meaning from previously acquired skills (Gencel et al, 2021; Trongtorsak et al., 2021), including through reflection, comprehension, integration, and application of knowledge, which can be described through the experiential learning cycle (Gencel et al, 2021; Trongtorsak et al.,

2021). Understanding the experiential learning cycle as a "spiral of continuous learning" (Gordon, 2022, p. 5), where individuals can begin learning at any stage within the cycle, may illuminate ways in which a recognition of prior knowledge relevant to onboarding could support the creation or streamlining of processes (Gordon, 2022). Further research could identify opportunities to integrate prior knowledge into onboarding programs and/or ways in which processes can be streamlined to help new employees integrate more smoothly into the organizational environment (Hillman, 2010).

The current onboarding literature and this study focus most directly on processes and practices as understood from a colonial western perspective, with little consideration for equity, diversity, and inclusion. This reflects a current gap in the onboarding literature and a potential limitation with current onboarding practices in the context of diversity and inclusion. Further research on onboarding practices that includes consideration of different cultural factors and perspectives would be beneficial. The goal of onboarding programs is to nurture a climate and culture in which new employees develop a sense of belonging (Jabaji, 2021). This includes opportunities to add diverse thinking and distinct behaviours, such as creativity and innovation into the organization (Becker & Bish, 2021). A key way for organizations to ensure appropriate understanding and accommodation is through education, conversation, and the development of resources (Iwanaga et al., 2021), to aid the organization in supporting each new team member, while helping to promote an organizational culture framed in diversity and inclusion (Jeske & Olson, 2021). Additional research in this area would help to provide a more fulsome and advanced understanding of additional methods for successfully onboarding new employees in a multicultural context, while also advancing current onboarding practices to include considerations of diversity and inclusivity.

Conclusion

When a new employee begins working at an organization, they bring with them their hopes, aspirations, and goals. Will I finally get to put all my education and skills into practice? Will this job fulfill my ambitions? Will I find a new best friend among my co-workers?

Onboarding represents an opportunity to support a new employee as they begin their journey within an organization. For many organizations, that support extends only to basic matters of compliance, such as administrative processes and access, but it can and should mean so much more. Onboarding should be designed to calm nerves, inspire dreams, and foster imagination while conferring the skills, tools, and knowledge needed to be successful. For me this arrives at the fundamental goal of this research: to better understand the needs of new employees and how to support them. Through exploration of academic and trade literature, through data collection data analysis, I believe I have gained further insight into how employees want to be, and can be, supported. This study, while representing one specific onboarding example, has shown there is no conventional answer or single way to address the needs of each new employee. Instead, it has highlighted that an onboarding program requires thoughtful consideration and a recognition that employees are the most valuable asset an organization has. Through my recommendations and reflections, I have outlined some ways the university can strengthen its existing onboarding program, highlighting potential strategies to build in new knowledge, methods to increase engagement, and factors to consider towards increasing employee retention. Ultimately, the goal of these recommendations is to develop an onboarding program that allows all new employees the opportunity to better understand the organization, identify ways in which they can bring value, and recognize the value the university sees within them.

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Appendix A

Semi-Structured Interview Questions

1. Prior to your first day at the university, were you provided some resources or supports by your hiring manager or HR that helped you prepare for your first day?
    a. If you received resources and supports, did you find them beneficial?
    b. If not, what would have been helpful?

2. Tell me about your first day at the university, emotions you experienced, how you spent your time?
    a. Did you receive support from your hiring manager or department to help orient you to your role?
    b. Were there any specific documents or other measures put in place to guide you through your first day?
    c. Did you use the onboarding checklist? Was this helpful (or not)?

3. Can you describe your socialization experience into your new department?
    a. How did you meet your fellow co-workers?
    b. Any supports or helpful information received from co-workers?
    c. Your first impressions of the work environment?

4. Did you attend new employee orientation?
    a. If so, did you find it beneficial? Biggest takeaway?
    b. Was there information that you had hoped would be provided but wasn't?

5. Reflecting on your onboarding experience, are there any additional supports, information items, or resources that you think would have been beneficial for you to know/receive during your onboarding?

6. If you were participating in onboarding a new employee, what would you ensure you attended to, to support their entry to their new position?

7. Is there anything else you would like to share regarding your onboarding experience?
    a. Anything you might want to share with those who lead this process?
    b. Anything you might want to share with those who are taking up a new job here at the university?

8. Do you know of any other individuals who might be interested in participating in this study?