

The Pennsylvania State University

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**NEWCOMER ONBOARDING: WHAT HAPPENS, WHAT HELPS, WHAT
HINDERS, AND THEIR HOPES**

A Dissertation in

Workforce Education and Development

by

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ABSTRACT

Onboarding, the process of bringing in, training, and acculturating new hires, is one of the most common talent development interventions but it is often viewed as ineffective. The purpose of this study was to understand how newcomers experience onboarding—what happens to them, what helps them, what hinders them, and what they hope for—which can provide pragmatic recommendations for human resource development (HRD) practice that are grounded in newcomers’ actual experiences and needs and contribute to developing theory about this process. A systematic literature review using enhanced critical incident technique (ECIT), combined with a qualitative empirical study collecting data from newly hired workers through a diary method and also analyzed using ECIT, provided insights on what and who helps newcomers to adjust to their new workplaces, what hinders them in their efforts to become successful insiders, and what they hope for in that process. Participants identified 741 helping incidents, 386 hindering incidents, and 244 hope incidents, yielding 21 helping factors, 12 hindering factors, and 8 hope items. Within the helping factors, hindering factors, and hope items, there were both organizational and individual subsets. Newcomers are agentic and hopeful. They use their psychological human capital to aid their adjustment. They are helped by productive interactions with newcomers and asking questions. They are hindered by information overload and anxiety. They hope for more guidance and to make allies. The findings can be used by HRD practitioners and job seekers/newcomers to

evaluate the onboarding programs currently offered in their workplaces and implement more effective practices.

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Chapter 1

Introduction

Background of the Research

Onboarding, the process of bringing in, training, and acculturating new hires (Acevedo & Yancey, 2011; Harris et al., 2020; Klein & Weaver, 2000; Klein et al., 2015; Van Maanen & Schein, 1979), is one of the most common talent development interventions but it is often viewed as ineffective by the newcomers who experience it and the human resource development professionals who implement it (Association for Talent Development, 2017; Klein et al., 2015; Lengnick-Hall et al., 2009; Rollag et al., 2005; Saks & Gruman, 2012; Wanous & Reichers, 2000). Human resource development (HRD) professionals and scholars agree that onboarding is critical for retention and engagement (Fyock, 2009; Graybill et al., 2013; Mahan et al., 2019; Ncube, 2008; Workforce Management, 2009a). Several studies demonstrate negative onboarding experiences can cause significant newcomer turnover and cost. Bagley (2008) found that 20 percent of newcomers quit within the first 1.5 months and 50 percent did so within the first year. Mahan et al. (2019) found that almost 50 percent of newcomers quit within the first 3 months and more than 33 percent quit within the first year. Galagan (2015) reported 31 percent of newcomers quit within the first six months.

If the new hire perseveres through that first year, their onboarding experience has a significant impact on their engagement, commitment, and future performance with their

current employer (Caldwell & Caldwell, 2016; Fyock, 2009; Klein, & Weaver, 2000; Graybill et al., 2013; Srimannarayana, 2016), future employability (Ruiz-Quintana & Claes, 1996; Zmud & McLaughlin, 1989), and long-term career success (Chao et al., 1994). Mishandled onboarding undermines trust and violates an organization's ethical obligations and may have “devastating” (p. 47) consequences for the organization as well as the newcomer (Caldwell & Caldwell, 2016).

The practices organizations employ in their onboarding processes vary widely (Acevedo & Yancey, 2011; Edwards, 2009), but common best practices include interventions such as a partial, one- or two-day group training program; a mentor or buddy; a checklist; a review of employment, benefits, compensation, safety, and security policies; granting access to communication and information resources such as online onboarding portal, handbook, email, and listserv; a facility tour; and a social event such as welcome reception or lunch (Graybill et al., 2013; Ncube, 2008; Robbins, 2002; Welty, 2009; Workforce Management, 2009b). Onboarding is viewed as a shared responsibility between the human resources department, the new hire's supervisor, and peers within their work group (Fyock, 2009; Hacker, 2004; Srimannarayana, 2016). Experts suggest that onboarding should be structured, but sensitive to individual employee needs (Robbins, 2002), and allow newcomers to demonstrate their capabilities (Holton, 2001). Because job entry is a period of uncertainty and stress for new hires as they attempt to make sense of their new situation, they are actively seeking information (Barge & Schlueter, 2004; Wanous & Reichers, 2000). Barge and Schlueter (2004) also found new hires are trying to reconcile conflicting messages they receive from their employer during onboarding: fit in (socially), but also stand out (by performance).

In spite of onboarding's ubiquity as an intervention, its importance for retention and engagement, and the variety of approaches organizations use, poor onboarding experiences are very common (Caldwell & Caldwell, 2016; Filstad & McManus, 2011; Hacker, 2004; Harris et al., 2020; Holton, 2001). Research shows several reasons onboarding experiences are disappointing. First, HRD professionals often mishandle the process (Caldwell & Caldwell, 2016). Second, it is under-resourced and undervalued by management and leadership (Fyock, 2009; Ncube, 2008). Third, a typical onboarding process prioritizes organizational rule compliance, eclipsing new employee needs and leaving the newcomer overwhelmed with too much information and little context (Caldwell & Peters, 2018). Echoing some of those reasons, a survey of HRD professionals about onboarding found their top concerns were lack of leadership support or participation; inadequate budgets; line manager apathy; mismatched expectations; newcomer apathy; and lack of training among the leadership and development staff to deliver effective programs (Srimannarayana, 2016).

Lack of participation in onboarding as documented by Srimannarayana (2016) and Klein and Weaver (2000) may be the result of supervisors perceiving onboarding to be a waste of time and discouraging new hires from participating (Stanley, 2012). Even if the onboarding process is considered vital from a top-level HR perspective, this perspective may not be widely shared throughout the organization (Edwards, 2009; Stanley, 2012). Avowed HR onboarding policy is likely to be different than actual onboarding practice and how effectively it is operationalized (Lengnick-Hall et al., 2009).

In the United States, onboarding has a short-term focus as new employees are usually prepared only for their new position, not for future positions within the

organization (Acevedo & Yancey, 2011). Short-term focus may also be why onboarding processes are usually too brief (Fyock, 2009; Holton, 2001; Ncube, 2008), with the amount of time organizations invest in onboarding ranging widely, from one day, to two days, to two weeks, to six months, to one year (Graybill et al., 2013; Hacker, 2004; Wanous & Reichers, 2000; Welty, 2009). More successful processes continued for a year with multiple interventions (Holton, 2001).

Onboarding experiences delineate the career development of each newcomer (Chao et al., 1994; Srimannarayana, 2016). Onboarding is the time when newcomers learn about the cultural expectations and are accepted (or not) into existing groups (Acevedo & Yancey, 2011; Barge & Schlueter, 2004). Additional widely cited reasons why organizations need to practice onboarding effectively include: to make new employee aware of business, organizational structure, processes, and functions; to communicate HR policies; to clarify organizational mission, vision, and culture; to familiarize with organizational ethics and values; to socialize (Graybill et al., 2013; Mettälä, 2015; Ncube, 2008; Srimannarayana, 2016); and to ensure safety and regulatory compliance (Welty, 2009). Hacker (2004) warned that poor orientation experiences have lasting harmful impacts on the organization's reputation. Arachchige (2014) found lower professionalism and self-efficacy among new management assistants who were not effectively onboarded, which led to higher absenteeism and project costs.

Statement of the Problem

What newcomers experience during their early tenure that they perceive as onboarding, what helps or hinders them in this transition, and what they would recommend to improve their experience (hope) has rarely been the purpose of studies conducted on this topic, despite the fact that onboarding is an “individual adaption process” (Chan & Schmitt, 2000, p. 190) or change experience (Davey & Arnold, 2000) in which the newcomer needs to make sense of their new workplace (Allen, 2006; Beyer & Hannah, 2002; De Vos et al., 2003; Vandenberghe et al., 2021). This has been the case because the purpose of research on this topic has been primarily to use convenient cohorts of individuals, who are assumed to be very similar, to perform quasi-experimental studies along the lines of industrial-organizational psychology topics that have little bearing on the real world of work or the needs of the newcomers. Another purpose, more relevant to newcomers, has been to test theory, principally the Van Maanen and Schein (1979) organizational socialization tactics model, which has shown mixed results that are difficult to apply. Both of these purposes entail quantitative research methods. Of the 129 articles reviewed for this study, 105 or 81.4% were quantitative studies. Because onboarding is a phenomenon *experienced* by newcomers, a qualitative approach emphasizing the participant’s experience and perspective within their environment (Aldiabat & Le Navenec, 2011; Butterfield et al., 2010) is needed and will be provided by this study.

In addition to the overreliance on quantitative studies (Schein, 2015)—with a few notable exceptions (see Korte et al., 2015)—the socialization research program

predominantly relies upon homogenous sample groups or surrogates who do not represent the actual population (Adkins, 1995; Bauer & Erdogan, 1996; Bullis, 1993; Nelson, 1987; Schneider, 1996; Rogers, 2020). In my literature search process, I excluded articles that did not meet my inclusion criterion that study participants be actual newcomers in a workplace setting. As a consequence, for example, initial search results showing 106 potential articles from *Human Resource Development International* yielded only four usable studies; 65 potential articles from *Personnel Psychology: A Journal of Applied Research* reduced to seven usable studies. The most common reason articles were excluded from the final set was they were not about workplace newcomers, even within the parameters of my search. Researchers were assuming they could use convenience samples of students (most commonly) as surrogates for newcomers in the workplace.

When actual newcomers in the workplace environment *are* recruited as participants, onboarding studies commonly take a management perspective, reporting on organizational policy or what onboarding training activities are offered as explained by the human resources professionals there, and not necessarily reflecting what the newcomer is *experiencing* as onboarding (Edwards, 2009; Lengnick-Hall et al., 2009; Stanley, 2012). Based on the literature review conducted for this study, extant studies are primarily seeking main effects of various treatments on newcomers, leading to many findings of helping factors, fewer of hindering factors, and a tiny number of hope factors. This indicates that what workplace agents do that helps newcomers is probably well understood among scholars; however, less well understood is the importance of who is taking the action. The importance of peer actions and newcomer agency in their

onboarding are emerging concepts that need further investigation. What hinders newcomers is typically not sought in research, and therefore is not well understood. Hindering factors were more likely to be found in qualitative studies, which accounted for less than 15% of the literature sample. What newcomers hope for has been investigated by, literally, a handful of scholars. Thus, the gap this study can address are: clarifying which actors help and how; identifying hindering factors to be reduced or eliminated; and eliciting newcomer hopes for how they would like to be onboarded, even as they are grateful for the onboarding experiences planned on their behalf (whether those experiences are actually helpful or not).

This study aims to provide a missing perspective of the newcomer who experiences onboarding, acknowledging the newcomer as an active agent (Yoon, 2019) in this process. Additionally, this study will produce results that can be applied in a workplace setting by HRD professionals or by the newcomers themselves to improve onboarding practices and outcomes.

Purpose of the Study

The purpose of this study is to better understand how newcomers experience onboarding—what happens to them, what helps them, what hinders them, and what they hope for—which can contribute to developing theory. Ultimately, this study should provide pragmatic recommendations for HRD practice that are grounded in newcomers' actual experiences and needs.

Research Questions

To address the research purpose, I propose the following research questions:

1. What helps newcomers' successful onboarding?
2. What hinders newcomers' successful onboarding?
3. What wishes or hopes do newcomers have for successful onboarding?

Significance of the Study

This study was designed to discover factors that help or hinder and what newcomers hope for successful onboarding, a perspective lacking from most previous research in the overall onboarding (or organizational socialization) research program. This study will contribute to the literature by presenting the results of a qualitative, field-based study that acknowledges individual differences among newcomers and workplace contexts.

Successful onboarding is the foundation for a newcomer's career development (Caldwell & Caldwell, 2016; Chao et al., 1994; Ruiz-Quintana & Claes, 1996; Zmud & McLaughlin, 1989). Each newcomer begins with different resources, interests, and needs (Carr et al., 2006; Richard et al., 2017), which she tries to address during the onboarding process as the employer is also attempting to maximize their human capital investment (Batistic, 2018) or minimize their costs. But even when the employer neglects onboarding or conducts it using ineffective tactics, the newcomer adapts or self-onboards anyway, for better or worse (Van Maanen & Schein, 1979). A better understanding of newcomers'

needs and effective ways to address them is mutually beneficial to those newcomers and the enterprises that hire them in several different ways.

A goal of this study is to provide an empirically grounded model and applied outcomes that HRD professionals and newcomers can use during the onboarding process. This study will contribute to a better understanding of what newcomers find helpful to them in adapting to their new workplace. The findings will confirm which helping factors should be continued in onboarding programs or added to those that lack them. As part of the helping factors, this study will expand upon the helping actors, both workplace agents (Bamberger et al., 2017; Kammeyer-Meuller & Wanberg, 2003; Kammeyer-Meuller et al., 2013; Korte, 2009; Korte et al., 2015; Nasr et al., 2019; Ou et al., 2018; Smith et al., 2013) and agentic newcomers themselves (Polach, 2004; Slebarska et al., 2019; Zheng et al., 2016). The findings will contribute to a better understanding of what newcomers find hindering to them in adapting to their new workplace (Filstad & McManus, 2011; Harris et al., 2020) to support minimizing or correcting those hindering factors. Finally, this study will contribute to a better understanding of what newcomers hope for in their onboarding (Daskalaki, 2012; Korte et al., 2019; Raghuram, 2011). The findings can be used to reinforce the known helping factors or add novel helping factors to the onboarding process.

Definition of Terms

“Onboarding is the initial process of assimilating new hires into an organization,” (p. S10) and a “critical component” (p. S10) of a talent management strategy (Workforce Management, 2009a). New hires are often referred to as newcomers.

In the past, the terms onboarding, organizational socialization, induction, assimilation, and new employee orientation were clearly differentiated, particularly in the scholarly literature about the topic, but now the terms are considered interchangeable and “onboarding” is used for the overall process by scholars, HRD practitioners (Fyock, 2009; Stanley, 2012; Srimannarayana, 2016) and newcomers. Although the term “socialization” is commonly used in the scholarly literature to mean the onboarding process, ironically it is now used by HRD practitioners to indicate more social aspects of an onboarding program, such as getting to know coworkers and becoming part of the group (Acevedo & Yancey, 2011; Srimannarayana, 2016).

Limitations and Scope

All research is partial, contextual, and geographically and historically situated (Haraway, 1988), and so has limitations. For this study, particular limitations I considered included drop-out rate due to the length of time I asked participants to be involved in the study; the need to gain the trust of the participants to reveal what is actually happening—to get them to “get real” with me; who volunteered to participate; and personal challenges

which could hamper participants' ability to continue in the study. My instrument, an online journal, made this study inaccessible to certain individuals.

The scope of my study was individuals who were starting a new job. Participants who met the inclusion criteria for the study were asked to complete a weekly journal entry for four to eight weeks.

Conceptual Foundations

Onboarding calls upon on several theoretical domains: human capital theory, social cognitive theory, and organization theory. But the focus of this study on the newcomer as an individual rests most on the social cognitive theory of human agency (Bandura, 2018; Yoon, 2019). My use of the term “hope” in place of the term “wish” traditionally used in ECIT (Butterfield, et al., 2009; McDaniel et al., 2020) was influenced by Hope-Action Theory (Niles et al., 2019; Yoon et al., 2019) to reflect the agency of newcomers. A wish is something that must be granted; a hope may be partially evoked by the newcomer. In addition, I collected data from newcomers in the process of onboarding, rather than asking participants to recall a past experience they can no longer influence. From that theoretical backdrop, I hope to propose a new grounded theory or model of onboarding. It is worthwhile to note here that the research design for both the literature review and the data collection uses ECIT and a grounded theory-influenced analytical approach (Charmaz, 1990; Wolfswinkel et al., 2013).

Chapter Summary

Chapter 1 introduced the study. It presented the background on the topic of onboarding to provide context for the statement of the problem, a lack of qualitative research grounded in the actual experiences of workplace newcomers. The purpose of the study is to gather information on those experiences using research questions that explore what happens, what helps, what hinders, and what newcomers hope for. The significance of this study outlines how this research will contribute to improving the practice of onboarding and why that is needed. Definitions of onboarding and newcomers were provided. The study limitations and scope were related to participants, instrumentation, and sampling strategy. The conceptual foundations identified the general and specific theories guiding the literature review, data collection, and analysis, as well as the intention for this study.

Chapter 2

Review of Related Literature

The purpose of this systematic literature review is to present how the extant scholarly literature on onboarding, or organizational socialization, conceptualizes the phenomenon, and empirically demonstrates what is helpful to newcomers, hindering to newcomers, and what newcomers hope for as background for a new empirical qualitative study also using enhanced critical incident technique or ECIT (Britten, 2014; Butterfield et al., 2005; Butterfield et al., 2009; Butterfield et al., 2010). It reveals what is known and where there are knowledge gaps (Torraco, 2005) on this topic. The literature review is intended to frame and support my research problem. This chapter will present the process for the literature review including how the search was conducted and how the literature was analyzed; themes relevant to the research questions; and a summary.

Review Process

I followed the Wolfswinkel et al. (2013) five-step process called the grounded theory literature review method. Step one is to define the criteria for inclusion and exclusion, the fields of research, appropriate sources, and search terms. Step two is to search. Step three is to refine the sample. Steps one through three are explained in more detail in the following subsection on Literature Search Process. Step four is to code, starting with open coding, axial coding, and then selective coding. Step five is to

represent and structure the content, focusing on my research questions, but also being open to other useful concepts that emerge. Steps four and five are explained in more detail in the following subsection on Literature Analysis Process.

Literature Search Process

My strategy for this systematic literature review was to use the primary search terms “organizational socialization” OR “organisational socialisation,” AND “newcomer” AND “work” anywhere in the item from 2000 to 2020 for a set of 36 relevant journals across the disciplines of adult, lifelong, and workforce education, human resources, labor and employment relations, and industrial and organizational psychology. The journal websites were accessed via Penn State University Libraries. The search was repeated in March 2022 to capture additional articles published during the intervening time period. The March search used the same primary search terms but did not specify journal titles.

Inclusion criteria (Pautasso, 2013) were that the article had to be scholarly and peer-reviewed, an empirical study, about the workplace and newcomers, in English, and full-text available online. Literature reviews and other theoretical articles were not included. Exclusion criteria (Pautasso, 2013) were that the article was not about students, customers, software, or nonworkplace contexts. For example, a study on organizational socialization using current student participants as surrogates for actual newcomers in a workplace would be excluded.

The initial searches yielded 883 articles. They were reviewed against the inclusion and exclusion criteria to yield a refined sample of 134 articles. The most common reasons for discarding articles were that they did not collect empirical data or were not about workplace newcomers.

PDFs for all articles were imported into NVivo computer-assisted qualitative data analysis software (CAQDAS) and classified with the following variables: author, publication year, journal title, type of study (quantitative, mixed methods, or qualitative), and type of reference (search, backward reference, or forward reference). A few more articles were discarded after being imported in NVivo as a more careful reading revealed they did not meet the criteria, usually because they did not collect empirical data or were not about workplace newcomers. As articles were reviewed and analyzed in NVivo, additional backward references were identified, sought, and added to the set if they met the inclusion criteria, resulting in two additional articles. The final number of articles the search strategy yielded for this study is 129, from 2000 to 2022. Of the 129 articles, 105 (81.4%) were quantitative studies, 21 (16.3%) were qualitative studies, and three (2.3%) were mixed methods. Table 2.1 shows the journals that published the 129 articles used in this analysis, arranged by number of articles in decreasing order.

Table 2.1
Literature Search Final Sample

Journal Title	<i>n</i>
Journal of Applied Psychology	17
Journal of Organizational Behavior	14
Journal of Occupational and Organizational Psychology	12
The International Journal of Human Resource Management	11
Academy of Management journal	10
Journal of Management	8
Personnel Psychology	7
Human Resource Management	7
Human Resource Development Quarterly	6
Human Resource Development International	4
Journal of Career Development	4
Human Relations	2
The Journal of Applied Behavioral Science	2
Organizational Behavior and Human Decision Processes	2
Public Personnel Management	2
Advances in Developing Human Resources	1
International Journal of Lifelong Education	1
Engineering Studies	1
Social Networks	1
Journal of Human Behavior in the Social Environment	1
Journal of Managerial Psychology	1
Human Resources for Health	1
Applied Psychology	1
Journal of Career Assessment	1
Journal of Business Ethics	1
Team Performance Management: An International Journal	1
Communication Studies	1
DIEM: Dubrovnik International Economic Meeting	1
Organization Science	1
Social Behavior and Personality	1
Journal of Occupational and Organizational Psychology	1
Journal of Vocational Behavior	1
Journal of Personnel Psychology	1
Frontiers in Psychology	1
Human Resource Management Journal	1
The Journal of General Psychology	1
Total Articles	129

Literature Analysis Process

Once all articles were imported in NVivo and classified, a grounded theory-influenced inductive approach was taken to bring out the key themes and trends in the literature, within the ECIT framing categories of context, helping factors, hindering factors, and hopes. Grounded theory uses an explicit procedure (Charmaz, 1990; Creswell & Poth, 2016) of inductive coding, a process known as “raising terms to concepts” (Charmaz, 1990, p. 1168). Another benefit of using this approach to a literature review is that it “enables the key concepts to surface, instead of being deductively derived beforehand; they emerge during the analytical process of substantive inquiry” (Wolfswinkel et al., 2013, p. 46).

My process of coding, shown in Table 2.2, includes highlighting and selecting or tagging meaningful phrases or sentences that are relevant to my research questions. I preserved *in vivo* codes, or the author’s actual words as long as possible in my process. Next, in the axial coding phase, I grouped tagged units into labeled categories based on topic similarity and reflected on how the categories could be differentiated from each other. In the selective coding phase, I explored the categories and relationships between them more deeply to find concepts, themes, models, and the story of the data (Charmaz, 1990; Rossman & Rallis, 2017; Wolfswinkel et al., 2013). I went through the literature analysis process iteratively until I approached saturation, or when there was “no new data, no new themes, no new coding, and ability to replicate the study” (Fusch et al., 2015, p.1409).

Table 2.2*Literature Analysis Process*

Steps	Description
Phase 1: Immersion	
1.1 Organize data	Import PDFs into NVivo, adopt naming convention, and classify all files by inclusion criteria. Citations were included in each article file classification.
1.2 Become familiar with data	Read and make initial notes. Tag/highlight initial <i>in vivo</i> units of meaning.
1.3 Incubate and reflect on data	Consider how initial <i>in vivo</i> meaning units could be gathered into codes.
Phase 2: Analysis	
2.1 Code data	Create a first set of inductive <i>in vivo</i> codes by closely reading articles for relevant phrases, sentences, and paragraphs that address the research questions.
2.2 Identify categories	Consider how <i>in vivo</i> codes can be constructed into categories within ECIT thematic structure, i.e. definition/context, helping, hindering, and hopes, and new emergent subcategories, i.e. individual versus organization.
2.3 Generate initial themes	Consider the categories to find common experiences, a process known as “raising terms to concepts” (Charmaz, 1990, p. 1168).
2.4 Repeat	Repeat steps in phase 2, identifying additional inductive codes and analyzing articles for units to include in them until saturation is reached.
Phase 3: Interpretation	
3.1 Interpret the data	Reflect on codes, categories, and themes. What is present and what is missing? What is the minority report? What are the trends, strengths, and weaknesses in the research? How does this set the stage for my study?
3.2 Search for alternate understandings	Consider alternative ways to think about this. What prior experiences are biasing my interpretation? How do my interpretations fit with the previous understandings?
3.3 Write the report	What are the practical and research implications? What are the limitations? What visualizations might be helpful in sharing the results?

I used NVivo CAQDAS to conduct my analysis of the literature. CAQDAS helps researchers to be more efficient in analyzing large qualitative text datasets such as interviews, questionnaires, and articles (Fielding et al., 2013). It provides an overall project management site and helps to document analytical decisions, which aids in

validity and reliability (Bernard et al., 2016; Silver & Lewins, 2014; Welsh, 2002). I completed the NVivo core skills certification course on October 8, 2020, and the NVivo certified expert course on June 30, 2021. As principal investigator, I provide my audit trail by using NVivo CAQDAS, documenting my analysis process and decisions, and explicitly describing my methodology. I also strive for reliability by using the processes of memoing, or routine self-reflection on about my assumptions and decisions (Charmaz, 1990; Creswell & Poth, 2016; Rossman & Rallis, 2017), and bracketing, or acknowledging my preconceptions and a priori knowledge and trying to be transparent and deliberate about explaining how I am setting them aside or using them to frame my analysis (Tufford & Newman, 2012). Table 2.3 shows how the prefigured ECIT categories and emergent categories and subcategories were defined.

Table 2.3*Definitions of Categories*

ECIT Category	Type	Definition	Example <i>in vivo</i> code
Definition and context	Prefigured	How the study authors defined socialization/onboarding	“In general, successful socialization is the transformation from outsider to participating and effective insider” (Allen, 2006, p. 238)
Helping Factor	Prefigured	Experiences or conditions that occurred and contributed to socialization/onboarding	“information seeking was significantly related to role clarity and social acceptance” (Bauer et al., 2007, p. 715)
Hindering Factor	Prefigured	Experiences or conditions that occurred and threatened or weakened socialization/onboarding	“newcomers to a group might feel uncomfortable using electronic communications for exploring normative types of socialization information” (Ahuja & Galvin, 2003, p. 177)
Hope Item	Prefigured	Experiences or conditions that did not occur, but the newcomer expressed a desire or wish for them to occur	“the newcomer discusses an improvement that he would like to see in the program but also the means through which shifts in work practices could be brought about: through direct involvement and participation of the newcomers in the organization of work” (Daskalaki, 2012, p. 106)

Onboarding Definition and Context

Onboarding is a process that takes place when a newcomer starts in a new work environment (Carr et al., 2006; Eberl et al., 2013; Ellis et al., 2017; Harris et al., 2020) characterized by “learning and assimilation” (Nasr et al., 2019, p. 770). It is widespread across many countries and all industries in large and small contexts including education

(Ghosh et al., 2013; Kammeyer-Mueller & Wanberg, 2003; Klein & Weaver, 2000), energy (Firth et al., 2014), financial services (Beenen et al., 2016), healthcare (Dormael, 2008; Dunford, et al., 2012; Filstad & McManus, 2011), hospitality (Chu & Chu, 2011), manufacturing (Korte, 2009), military (Cooper-Thomas & Anderson, 2002; Delobbe et al., 2013), technology (Chen & Klimosky, 2003; Ellis et al., 2017), transportation (Carr et al., 2006) and others. Often the organizational culture and climate shape the approach to onboarding (Filstad & McManus, 2011; Rollag, 2004; Wang & Kim, 2013); as onboarding shapes the organization (Cable et al., 2000; Nguyen et al., 2021).

The most critical period of onboarding is the first several weeks (Cooper-Thomas & Anderson, 2002; Harrison et al., 2011; Rollag, 2004; Saks & Ashforth, 2000). During this time, information is exchanged between the organization and the newcomer (Ahuja & Galvin, 2003; De Vos & Freese, 2011; Kim & Moon, 2021) through various activities including training (Allen & Shanock, 2013; Dormael, 2008; Harris et al., 2020; Kammeyer-Mueller et al., 2013), with the successful outcome of socialization being the “transformation” (Allen, 2006, p. 238) from outsider to insider (Allen & Shanock, 2013; Bauer et al., 2007; Beddoes, 2021; Eberl et al., 2012) who is clear about their role (Bauer et al., 2007; Cooper-Thomas & Anderson, 2002; Harris et al., 2014), satisfied with their job (Baker & Jennings, 2000; Motani et al., 2019; Shipp et al., 2019), able to perform it efficiently (Beus et al., 2014; Beyer & Hannah, 2002; Chen, 2005), participate effectively in their team or group (Chen, 2005; Chen & Klimosky, 2003; Delobbe et al., 2013; Nifadkar & Wu, 2021), and less likely to leave the organization (Allen & Shanock, 2013; Beenen & Pichier, 2014; Chen et al., 2011; Chu & Chu, 2011; Wang et al., 2021).

The newcomer learns their role (Filstead & McManus, 2011; Ishii et al., 2011; Korte, 2009; Traeger et al., 2021) and “the attitudes, behavior, and knowledge” (Cable & Parrsons, 2001, p. 2) of company culture (Cable et al., 2000; Guo et al., 2021; Kim et al., 2015), including values and norms (Chow, 2002; Hsiun & Hsieh, 2003) and language (Daskalaki, 2012). It is an “individual adaption process” (Chan & Schmitt, 2000, p. 190) or change experience (Davey & Arnold, 2000) in which the newcomer needs to make sense (Allen, 2006; Beyer & Hannah, 2002; De Vos et al., 2003; Vandenberghe et al., 2021) of their new workplace. Onboarding is widely considered to be a stressful time for the newcomer (Saks & Ashforth, 2000; Cepale et al., 2021; Slebarska et al., 2019).

Although they have some needs in common, the first-time job holder and one with previous work or management experience respond differently to the process (Carr et al., 2006; Chreim & Tafaghod, 2012; Wang et al., 2011). One important way the newcomer adapts is by seeking feedback and other information (Ahuja & Galvin, 2003; Beenen et al., 2016; De Vos & Freese, 2011; Zheng et al., 2016) in order to convert their educational knowledge into professional productivity (Filstad & McManus, 2011; Nifadkar & Bauer, 2016).

Through their onboarding practices, workplace organizations help or hinder the newcomer during this important period of adjustment. The individual newcomer also helps and hinders herself. The rest of this chapter reports on helping factors, hindering factors, and hopes for in their onboarding based on the literature reviewed for this study. Following the ECIT method, each research article is considered as a case. Within each article, each mention of a helping, hindering, or hope finding in that article is considered

a codable unit of meaning. Similar units of meanings were gathered into factors, categories, and themes.

Table 2.4 shows an overall count of the helping factors, hindering factors, and hope factors from the analysis of the literature. The rest of this chapter describes more fully the findings related to helping factors, hindering factors, and hope factors.

Table 2.4

Frequencies for ECIT Categories

ECIT Categories	Cases		Incidents	
	<i>n</i>	%	<i>n</i>	%
Helping Factors	120	93	446	77
Hindering Factors	39	30	128	22
Hope Items	5	4	6	1
Total	129	100	580	100

Helping Factors

Helping factors are findings from the literature that describe experiences or conditions that occurred and contributed to the newcomer's successful onboarding. There are two subcategories within the helping factors: organizational and individual.

Organizational factors represent the majority of factors within the helping category, but individual factors are an important group. Organizational factors include the organizational policies, practices, and the actions of socializing agents such as managers, coworkers, human resources professionals, clients, and others. Individual factors are behaviors newcomers take to help themselves. Table 2.5 shows the cases and incidents

for helping factors from the literature review. This section will present the organizational factors first.

Table 2.5

Frequencies for Helping Factors

Factor	Cases		Incidents	
	<i>n</i>	%	<i>n</i>	%
Total Helping Factors	120	93	446	100
Organizational	108	84	262	59
1. Institutional Socialization Tactics	41	32	57	13
2. Respect Individual Differences	36	28	42	9
3. Facilitate Social Relationships	34	27	75	17
4. Prepare Coworkers and Supervisors	34	27	57	13
5. <i>Realistic Recruitment and Selection</i>	28	22	31	7
6. <i>Opportunities to Perform</i>	13	10	14	3
Individual	32	24	36	7
1. <i>Seeking Information and Feedback</i>	19	15	20	4
2. <i>Proactivity</i>	13	10	16	3

Note. Factors in italics are below the ECIT 25% viability threshold.

Organizational Factors

The top organizational helping factor, with a 32% participation rate, is the use of institutional tactics—based on the tactics theorized by Van Maanen & Schein (1979) and later grouped as institutional or individual by Jones (1986)—for socialization (Allen & Shanock, 2013; Chow, 2002; Eberl et al., 2012; Filstad & McManus, 2011; Garner et al., 2021; Kim et al., 2005; Klein & Weaver, 2000; Nasr et al., 2019; Peltokorpi et al., 2022; Slattery et al., 2006; Spagnoli, 2020). “Our findings speak to the importance of sending a strong, consistent signal to new employees through the use of institutionalized socialization tactics” (Scott et al., 2012, p. 196). Specific tactics that help are serial and

investiture (Allen, 2006; Cable & Parsons, 2001); sequential and fixed (Cable & Parsons, 2001). Training, coaching, mentoring, and career development, provided within the institutional socialization approach were also helpful (Chi & Wang, 2018; Chow, 2002; Delobbe et al., 2013; Dormael, 2008; Tabyuna et al., 2015; Wang et al. 2011; Yu & Davis, 2016;). The use of institutional tactics builds trust (Delobbe et al., 2013; Eberl et al., 2012; Scott et al., 2012), helps set expectations (Raghuran, 2011; Robinson & Morrison, 2000), and can facilitate information and feedback seeking behavior by newcomers (Chow, 2000; Woodrow & Guest, 20217; Zheng et al., 2016).

The second organizational helping factor, with a 28% participation rate, is to respect individual differences. “Not all newcomers are alike” (Carr et al., 2006). Newcomers benefit when onboarding practices take into account individual differences such as previous work experiences (Beus et al., 2014; Beyer & Hannah, 2002; Carr et al., 2006; Chan & Schmitt, 2000; Chreim & Tafaghod, 2012; Gardner et al., 2021; Harris et al., 2017; Peltokorpi et al., 2022; Robinson & Morrison, 2000), their personal differences (Beyer & Hannah, 2002; Daskalaki, 2012; Ellis et al., 2017; Harrison et al., 2011; Kim & Liu, 2017; Li et al., 2011) including gender (Chen & Klimoski, 2003; Tabyuna et al., 2015), personality (Elis et al., 2017; Harrison et al., 2011; Kammeyer-Meuller & Wanberg, 2003; Kim & Liu, 2017; Simon et al., 2017), and age (Chu & Chu, 2011; De Vos & Freese, 2011) and promote “positive psychological diversity climates” (Richard et al., 2017, p. 439). Considering differences and diversity in onboarding has become salient because “high labor mobility, casualization of work, and acquisition of transferable skills have all resulted in highly knowledgeable and sophisticated newcomers,” (Daskalaki,

2012, p. 109). Consequently, “no singular or consensus approach to learning and assimilation is equally effective for all new employees” (Fang et al., 2017, p. 541).

The third organizational helping factor, with a 27% participation rate, is facilitating social relationships. That means organizations can help newcomers by facilitating the development of new professional relationships (Allen & Shanock, 2013; Bakker et al., 2022; Beenen & Pichler, 2014; Chu & Chu, 2011) with their direct coworkers (Chen et al., 2011; Garner et al., 2021; Korte, 2010; Korte et al., 2019; Yuan et al., 2020), with their supervisors (Bauer et al., 2021; Gross et al., 2020; Montani et al., 2019; Schaubroeck et al., 2013), and other coworkers across and up the organizational hierarchy (Fang et al., 2017; Filstad & McManus, 2011; Morrison, 2002; Takeuchi & Takeuchi, 2009; van de Werff & Buckley, 2017) and by providing mentoring (Bakker et al., 2022; Takeuchi & Takeuchi, 2009; Thomas & Lankau, 2009; Yang et al., 2009) or coaching (Chen et al., 2011; Fang, et al., 2017; Filstad & McManus, 2011) on which behaviors, for example self-promotion and ingratiation (Gross et al., 2020) are effective in a particular organization’s culture (Filstad & McManus, 2011; Rollag, 2004; Wang & Kim, 2013). “Social integration requires interpersonal interactions” (Chu & Chu, 2011, p. 1176).

The fourth organizational helping factor, with a 27% participation rate, is preparing coworkers and supervisors for their role in onboarding. “Organizations may also be well served by ensuring that supervisors and coworkers, who appear to provide important socialization information, are well trained for this role” (Kammeyer-Meuller & Wanberg, 2003, p. 791). “Co-workers, despite the fact that they are not ‘official’ organizational agents, are the most important information sources during the first year of

employment” (De Vos & Freese, 2011, p. 308), so they need to be prepared for their role in helping newcomers (Bamberger et al., 2017; Harris et al., 2020; Kammeyer-Meuller & Wanberg, 2003; Kammeyer-Meuller et al., 2013; Korte, 2009; Korte et al., 2015; Nasr et al., 2019; Ou et al., 2018; Smith et al., 2013). Supervisors also need to be prepared “to not only talk with their new subordinates on task-related matters but also to pay attention to these newcomers’ general concerns” (De Vos & Freese, 2011, p. 308) and ensuring a helping and welcoming environment (Ghosh et al., 2013; Harris et al., 2014; Ivanova & Klimova, 2021; Montani et al., 2019; Nasr et al., 2019; Ou et al., 2018; Rubenstein et al., 2020; Sluss & Thompson, 2012; Vandenberghe et al., 2018; Woodrow & Guest, 2020). Studies suggested that hiring managers job descriptions should include their role in onboarding newcomers (Ellis et al., 2007); organizations should provide them with needed resources and training (Cooper-Thomas & Anderson, 2002; Jokisaari & Nurmi, 2009; Kammeyer-Mueller & Wanberg, 2003; Kammeyer-Meuller et al., 2013; Nasr et al., 2019; Perinelli, 2021; Thomas & Lankau, 2009) and “encourage and reward managers who are able to consistently create first-day experiences that help newcomers hit the ground running and help them feel more accepted over time” (Bauer et al., 2021, p. 2249).

The fifth organizational helping factor, with a 22% participation rate, is realistic recruitment and selection. Because “anticipatory socialization begins before interviews take place,” (Cable et al., 2000, p. 1083), organizations can help their newcomers by offering a realistic recruitment program and realistic job previews (Baker & Jennings, 2000; Cable et al., 2000; Carr et al., 2006; Kammeyer-Mueller & Wanberg, 2003; Lopina et al., 2012; Molleman & van der Vegt, 2007; Payne et al., 2015; Shipp et al., 2019;

Simon et al., 2017) about what is expected from them and what they should expect from the organization (De Vos et al., 2003; Dunford et al., 2012; Lundmark & Bjorkman, 2011; Robinson & Morrison, 2000; Smith et al., 2017). “Organizations should monitor whether their public image corresponds to their self-image and whether applicants, who were prone to identify with the organisation, are the desired ones” (Eberl et al., 2012, p. 356). Organizations should ensure their selection criteria actually align with the skills needed and organizational culture (Rollag, 2004; Selmer, 2004). When newcomers leave, exit interviews also help the organization learn how to better help the next newcomer and prevent their turnover (Baker & Jennings, 2000).

The sixth organizational helping factor, with an 10% participation rate, is opportunities to perform. Opportunities to perform meaningful work (Ivanova & Klimova, 2021; Korte, et al., 2019; Raghuram, 2011) and help their new colleagues or clients benefits newcomers (Bamberger et al., 2017; Molleman & van der Vegt, 2007) as they learn by doing (Beyer & Hannah, 2002) and begin to develop their career (Beus et al., 2014; Maier & Brunstein, 2001). Support for creativity and the new ideas they bring helps newcomers (Harris et al., 2014; Lundmark & Bjorkman, 2011; Richard et al., 2017) feel like they are making a contribution. Starting off with a high-performing team also helps newcomers’ performance (Chen, 2005; Chen & Klimosky, 2003).

Individual Factors

The first individual helping factor, with a 15% participation rate, is seeking information and feedback, a specific strategy newcomers use to adjust to their new

workplace (Ahuja & Galvin, 2003; Bauer et al., 2007; Beenen & Pichler, 2014; Beenen et al., 2016). Newcomers seek information about what is required and expected and how they are doing (Ahuja & Galvin, 2003; Bauer et al., 2007; Beenen & Pichler, 2014). They seek information from coworkers (Chan & Schmitt, 2000) and supervisors (Beenen et al., 2016; Chan & Schmitt, 2000; Zheng et al., 2016) by asking questions (Harris et al., 2020) and by observing how their new colleagues do things and interact with each other (De Vos et al., 2003; Foulk & Long, 2016; Harris et al., 2020). However, newcomers' information and feedback seeking can be undermined by unresponsive colleagues (Kammeyer-Meuller et al., 2013; Kort et al., 2019; Nifadkar & Bauer, 2016). "A supportive feedback environment heightens the instrumental value of seeking feedback" (Vandenberghe et al., 2021, p. 539).

The second individual helping factor is proactivity, with an 10% participation rate. Proactive behaviors such as taking on challenging work assignments and initiating new relationships are critical to successful onboarding (Polach, 2004; Slebarska et al., 2019; Zheng et al., 2016).

Hindering Factors

Hindering factors are findings from the literature that describe experiences or conditions that occurred and threatened or weakened the newcomer's successful onboarding. Table 2.6 shows the cases and incidents for hindering factors from the literature review. Unlike the helping factors, all hindering factors represent organizational actions or inactions. There were no individual hindering factors. The number of hindering factors is quite a bit lower than the helping factors, most likely because studies are looking for positive effects, not negative ones. Additionally, the study method matters.

More hindering factors were found in qualitative studies, accounting for less than 16% of the sample, than in quantitative studies, accounting for 81% of the literature sample.

The hindering factors are grouped based on the level of intention: neglect (refraining from taking action to help) and undermining (taking action to hinder). In the neglect theme, the three hindering factors are deficient onboarding, apathy toward newcomers' needs, and unmet expectations.

Table 2.6

Frequencies for Hindering Factors

Factors	Cases		Incidents	
	<i>n</i>	%	<i>n</i>	%
Total Hindering Factors	39	30	130	100
<i>Neglect</i>	<i>30</i>	<i>23</i>	<i>56</i>	<i>43</i>
1. <i>Deficient Onboarding</i>	<i>13</i>	<i>10</i>	<i>21</i>	<i>16</i>
2. <i>Apathy Toward Newcomer</i>	<i>12</i>	<i>9</i>	<i>20</i>	<i>15</i>
3. <i>Unmet Expectations</i>	<i>11</i>	<i>8</i>	<i>15</i>	<i>11</i>
<i>Undermining</i>	<i>12</i>	<i>9</i>	<i>18</i>	<i>14</i>

Note. Factors in italics are below the ECIT 25% viability threshold.

The primary hindering factor is deficient onboarding, with a 10% participation rate. When onboarding is neglected, newcomers were left to onboard on their own (Filstad & McManus, 2011; Harris et al., 2020) and not provided with “details about their work tasks and responsibilities at the start of their jobs” (Korte et al., 2015, p. 192). Lack of training left newcomers feeling “they were missing critical information and wasting time in the early stages of their employment” (Korte et al., 2015, p. 194). Deficient onboarding can lead to uncertainty about work expectations (Korte et al., 2015) leading newcomers to “internalize dysfunctional norms, learn risky shortcuts, and develop habits

and repertoires that may ultimately do harm to both them and their employers” (Liu et al., 2015, p. 349).

Poorly implemented onboarding also hinders. In general, providing an orientation session, mentoring, and using a company intranet can be useful practices, but only when operationalized effectively.

Newcomers often described this experience as ‘drinking from a fire hose’ because of the large amount of detailed, procedural information presented ... [they] consistently reported that this experience was not helpful—largely because they had little to no context or experience from which to make sense of this information (Korte et al., 2015, p. 192).

Relying too much on email or computer-based onboarding is not a substitute for interactions with coworkers (Ahuja & Galvin, 2003; Wesson & Gogus, 2005). Also, assigning mentors who had negative attitudes did not help newcomers (Chi & Wang, 2018; Liu et al., 2022).

Another hindering factor in the neglect theme is apathy toward newcomers’ needs and experiences, with a 9% participation rate. This factor incorporates coworker indifference and lack of supervisor support, both of which are important to newcomers (Kammeyer-Mueller et al., 2013). “The urgent need to simultaneously master task responsibilities and establish a positive social reputation can place intense resource demands on newcomers” (Bamberger et al., 2017, p. 1720). When a manager fails to recognize their needs and provides little support or guidance, newcomers become dissatisfied (Ghosh et al., 2013; Irving & Montes, 2009; Jokisaari & Nurmi, 2009; Korte et al., 2015). Lack of supervisor support leaves the newcomer wondering what to do

(Ivanova & Klimova, 2021; Korte et al., 2019), frustrated at the lack of direction (Korte, 2009), and also reluctant to seek help from coworkers (Ivanova & Klimova, 2021; Kulkarni & Lengnick-Hall, 2011). “In these situations, newcomers often attributed these difficulties to lack of interest, respect, or attention from others” (Korte, 2009, p. 300). There are real implications for this apathy. Newcomers may start looking for another job (Korte et al., 2019), but if they remain, they experience “a slower increase” (Jokisaari & Nurmi, 2009, p. 538) in their salary. Although some kinds of apathy might be categorized as undermining, I was careful in my judgment: to be considered at the more intentional level, findings had to be explicit, specific, and active.

The third hindering factor in the neglect theme is unmet expectations, with an 8% participation rate. The expectations could be general (Irving & Montes, 2009; Korte et al., 2019; Polach, 2004; Saks & Ashford, 2000) or specific, such as a real or perceived broken promise (Shipp et al., 2019; Woodrow & Guest, 2020), perceived lack of career opportunities (Maier & Brunstein, 2001; Simon et al., 2017), or a lack of meaningful work (Korte et al., 2019; Kulkarni & Lengnick-Hall, 2011). “Being relatively isolated socially and not having meaningful work from the start create negative experiences for newcomers that are hard to overcome and increase the risk of their dissatisfaction and attrition” (Korte et al., 2019, p. 106), especially if the newcomer reaches their breaking point after repeated unmet expectations (Woodrow & Guest, 2020). Unmet expectations can be exacerbated by deficient onboarding (Shipp et al., 2019; Simon et al., 2017; Woodrow & Guest, 2020).

The second major hindering theme is undermining, with a 9% participation rate. These incidents range from neglecting to turn off a cell phone during a meeting or

leaving a copier jammed (Ghosh et al., 2013) to explicit actions by insiders to undermine newcomers by withholding support or resources (Chreim & Tafaghod, 2012; Nifadkar & Wu, 2021), ostracism (Liu, Zhang, Zhang & Wu, 2021; Liu, Zhang, Ji & Wu, 2021), personal criticism (Kammeyer-Meuller et al., 2013), microaggressions (Beddoes, 2021), or witnessing abusive behavior from supervisors toward peers (Jiang et al., 2021; Wang et al., 2021). “Supervisor and coworker undermining does exist and should be minimized as much as possible because it decreases feelings of social acceptance and increases withdrawal and turnover” (Kammeyer-Meuller et al., 2013, p. 1120). Conflict with coworkers discourages newcomers information and feedback seeking (Liu et al., 2021B; Nifadkar & Bauer, 2016), which is a critical individual helping action.

Hopes

Hopes are findings from the literature review that describe experiences or conditions that did not occur, but the newcomer expressed a desire or wish for them to occur. Table 2.7 shows the cases and incidents for hopes from the literature review.

Table 2.7

Frequencies for Hope Items

Items	Cases		Incidents	
	<i>n</i>	%	<i>n</i>	%
<i>Total Hope Items</i>	5	4	6	100
<i>Expertise is recognized and valued</i>	3	2	3	50
<i>Onboarding plan</i>	2	2	3	50

Note. Factors in italics are below the ECIT 25% viability threshold.

Only five articles, 4% of the total, yielded hope items. Unlike the helping factors, all hope items represent organizational actions. There were no individual hope items. Because the number was so low, I also conducted a word frequency search to find synonyms for hope; none came up in the top 1,000 most frequent words. I did a text search for variations of the terms wish, want, would, and desire. The top 12 in that set yielded no additional items. A possible explanation for this lack of hope items is that most studies investigated what did happen and failed to consider what did *not* happen. Additionally, many studies are approached from the employer's or manager's perspective and interests, and not those of the newcomer.

Among the five articles that revealed hopes, there were two items. First, newcomers hope that their expertise is recognized and valued, reflecting the helping factors, opportunities to perform and proactivity. "In particular, knowledge workers look for signals that their organization appreciates their inputs in the form of new ideas for the development of processes and products" (Raghuram, 2011, p. 3922). Within this factor, newcomers wanted a chance to implement their ideas to improve work practices (Daskalaki, 2012) and those in managerial roles wished for greater autonomy (Chreim & Tafaghod, 2012). Second, newcomers hope for an onboarding plan (Korte et al., 2019; Polach, 2004). "They expected that there would be more of a plan for how they would develop and where they would fit in the company as employees, or at least to know why they were here" (Korte et al., 2019, p. 99).

Chapter Summary

This chapter reviewed the literature on onboarding using the ECIT framework to identify helping factors, hindering factors, and newcomers' hopes to set the context for this study. Within the helping category, there are organization and individual factors, which did not emerge in the hindering or hope categories. The last two organizational helping factors and both individual helping factors did not meet the 25% participation rate threshold to be considered viable according to the ECIT method. None of the hindering factors or hope items met the 25% participation rate threshold to be considered viable according to the ECIT method. This lack of viable factors indicates weakness or gaps in knowledge about the onboarding experience.

Looking at the factors together, their relationships are clear. The helping factors can correct the hindering factors. Hindering factors elicit hopes. Hopes reinforce the helping factors. Table 2.8 compares the related factors. The use of institutional tactics for onboarding helps, deficient onboarding hinders, and newcomers hope for an onboarding plan. Respecting individual differences helps, apathy and undermining hinder. Newcomers are helped by opportunities to perform, hindered by the deficient onboarding, and hope that their expertise is recognized and valued.

Table 2.8*Comparison of Helping Factors, Hindering Factors and Hope Items*

Helping Factors	Hindering Factors	Hope Items
Opportunity to perform	Apathy toward newcomer	Expertise is recognized and valued
Respect individual differences	Undermining	
Realistic recruitment and selection	Unmet expectations	
Facilitate social relationships	Apathy toward newcomer	Onboarding plan
Institutional socialization tactics	Deficient onboarding	
Prepare coworkers and supervisor		
(Ind.) Seeking information and feedback	Undermining	
(Ind.) Proactivity	Apathy toward newcomer	

I used “hope” instead of the traditional “wish” for this ECIT analysis to emphasize the role of newcomer agency. Newcomers take actions to help themselves in their onboarding process. The emergence of organizational and individual helping factors supports this assertion. However, while individual factors are important and should be supported and facilitated, organizational factors have a greater impact on successful onboarding. The most proactive and agentic newcomer cannot compensate for unprepared and apathetic coworkers and a workplace with deficient onboarding.

This analysis shows that organizational helping factors have primarily been investigated using the Van Maanen and Schein (1979) and later, Jones (1986) tactics framework. Beyond the institutional tactics, my analysis has shown that the helping category comprises both organizational and individual factors, and that interactions with coworkers are important. The much smaller number of hindering factors and the handful of hope items suggest more research is needed to truly understand the newcomer’s onboarding experience.

Chapter 3

Method

Chapter 3 presents the method for this qualitative study. It provides information on the following facets: methodology, study purpose and research questions, the research design, study approval and ethical considerations, participants and sampling, data collection, instrumentation, data analysis, trustworthiness of findings, assumptions, limitations, and a chapter summary.

Methodology

This study was a qualitative research project using complementary techniques for data collection and analysis, all of which emphasize the participant's experience and perspective within their environment (Aldiabat & Le Navenec, 2011). A qualitative approach is used to collect primarily non-numerical data for the purpose of describing or exploring experiences in depth (Babbie, 2007; Boddy, 2016). Ontologically, I see the nature of reality as subjective, based on the position of the individual. Epistemically, a subjective reality can be partially understood by attending to the different ways in which people perceive and experience it (Seamon & Gill, 2016).

My research purpose was to explore helping factors, hindering factors, and hope items in newcomer onboarding, from their perspective, using their words and acknowledging the newcomer as an active agent in the process. For the topic of onboarding, quantitative research has provided results that demonstrated the relative effectiveness of some known helping

interventions, using predetermined models and theories. Using an inductive analytical approach, I sought to discover new interventions, models, or theories that are grounded in newcomer's actual experiences and environment. Qualitative studies are in the minority for the topic of onboarding, and my research design is novel for this field.

Purpose of Study and Research Questions

The purpose of this study was to better understand how newcomers experience onboarding, a critical career transition—what happens to them, what helps them, what hinders them, and what they hope for—which can contribute to developing a pragmatic theory about onboarding. To address the research purpose, I proposed the following research questions:

1. What helps newcomers' successful onboarding?
2. What hinders newcomers' successful onboarding?
3. What hopes do newcomers have for successful onboarding?

Research Design

The research design for this study employed enhanced critical incident technique (ECIT), a diary study or experience sampling (Fisher & To, 2012) and grounded theory (GT)-influenced inductive analysis. ECIT is widely used as a qualitative research method (Britten, 2014; Butterfield et al., 2005; Butterfield et al., 2009; Butterfield et al., 2010) and is “ideal for understanding participant's experiences” (Butterfield, et al., 2010, p. 146). ECIT usually uses a semi-structured protocol which has been shown to be useful for workplace contexts (Butterfield

et al., 2010) and life transitions (Britten, 2014). ECIT supplies a framework and the use of frequency tables to report results (Butterfield et al., 2009), but also “requires the use of inductive reasoning” (Butterfield et al., 2009, p. 272). The ECIT protocol is typically used to explore helping and hindering factors as well as participants’ wish list items about a particular experience by using an initial interview and a follow-up interview. The initial interview gathers the data in depth, “letting the participant tell his or her story” (Butterfield et al., 2009, p. 270), using the items shown in Table 3.3 in the “Instrumentation” section. In this study, instead of an initial interview, participants were asked to report in the Qualtrics-hosted onboarding log for four to eight consecutive weeks.

Diary studies are a data collection method that allows anyone to report and reflect on their everyday experiences when and where they happen (Czerwinski et al., 2004; Hyers, 2018) and also provide an opportunity for participants to engage in self-reflection (Hyers, 2018; Korver, 2016). Diary studies provide advantages over retrospective interviews in that participants record their experiences closer to the actual occurrence (Fisher & To, 2012). Diaries have long been used as a research tool in the work setting (Hyers, 2018; Reis et al., 2010) to study phenomena such as job satisfaction (Fisher & To, 2012). For this study, using a combination of interval- and event-contingent sampling, participants were asked to record at least once per week and any time a critical incident occurred to them for a period of four to eight weeks (Reis et al., 2010). Weekly is a natural break in the work cycle (Hyers, 2018; Fisher & To, 2012). A diary study is less interactive than an interview, but still requires rapport with the researcher (Hyers, 2018), and “diary studies have high ecological value as they are carried out *in situ*, or in the users’ real environments” (Czerwinski et al., p. 176), providing more accuracy than retrospective recall (Fisher & To, 2012) used in interviews. A mid-study check-in interview was

conducted with participants after their first four log entries for the purposes of probing for more information and initial member-checking. Using NVivo allowed me to conduct analysis contemporaneously with data collection. The data from participants who dropped out before the minimum of four log entries were not used in the analysis.

Following the typical ECIT protocol, a follow-up interview—in this study it was the closing check-in—was conducted with participants after they completed their eighth and final log for the purpose of facilitating member-checking and because “it ensures participants’ voices have been honoured and accurately reported” (Butterfield et al., 2009, p. 276). All interviews were conducted via the Zoom videoconference platform which allowed me to share my screen with the NVivo project window and review my analysis with each participant. Following Butterfield et al. (2009), during the check-ins I shared the factors that I identified as helping, , hindering, and hopes from their log entries, as well as all the categories I constructed from their and other participants’ coded entries. I used *in vivo* coding, so the participants could see their actual words and how I interpreted them. During the check-ins, I asked participants to confirm when I categorized their entries correctly, to alert me when I categorized the entries incorrectly, and they did. Participants often provided additional data on their experiences during these check-in interviews. I took notes, imported them into NVivo, and included them in the analysis. In this way, I treated my participants as collaborators or key informants (Fisher & To, 2012; Hyers, 2018).

A GT-influenced inductive approach was used for data analysis. GT is good to use when existing theories are inadequate (Creswell & Poth, 2016). It “enables the key concepts to surface, instead of being deductively derived beforehand; they emerge during the analytical process” (Wolfswinkel et al., 2013). While GT typically has a flexible data collection approach, it uses an

explicit procedure (Charmaz, 1990; Creswell & Poth, 2018) of inductive coding, a process known as “raising terms to concepts” (Charmaz, 1990). As applied field techniques, using ECIT, diary study, and GT-influenced inductive coding and analysis in combination facilitates my intentions for this study to produce a grounded model or theory as well as practical results that can benefit newcomers, HRD professionals, and their organizations.

Research Approval

Prior to any recruiting for this study, Institutional Review Board (IRB) approval was obtained by following the appropriate procedure for human subjects research. The principal investigator completed the required Collaborative Institutional Training Initiative (CITI) Protection of Human Research Subjects online training courses. This study (ID STUDY00012239) received IRB approval as exempt research on August 13, 2021. IRB guidelines for study protocols and informed consent were followed.

Ethical Considerations

Because workers are considered a vulnerable population by virtue of the potential risk to their livelihoods, their identities were protected. Participants’ names were not collected. Their employers’ names were not collected. Only participants’ email addresses were used to communicate with them. Emails were sent only to individual study participants; no group emails were sent to participants. Study participants were assigned a codename, which they entered each time they made a log entry. During the Zoom check-ins, the participant’s ability to share video was disabled; they could see me, but I could not see them. Participants were reminded routinely

that they could discontinue their engagement with the study at any time, for any reason. The thank-you gifts the researcher provided (\$25 Amazon gift cards) were not so large as to represent coercive compensation. Copies of the recruitment communication are presented in Appendices A and B.

Participants

The participants in this study were 34 newcomers recruited either prior to their start date or within one week of their start date primarily by using the social networking site LinkedIn. More details on the use of LinkedIn can be found in the following section on Recruitment and Sampling Strategy. Demographic information was collected using the Qualtrics consent and screening questionnaire. All the demographic items were collected with open text entry blocks; for example, for item 15, “My gender identity is,” participants could enter anything they wanted. The data were normalized, using the most common types of responses, when I created my case classification sheets in NVivo. In addition, during the mid-point check-in I asked participants what significant changes they were experiencing with their new job and how they would define their career stage. Table 3.1 provides a demographic overview of the participants. Table 3.2 shows the participants’ geographic locations. Table 3.3 shows the participants’ work industry.

Table 3.1*Participant Demographic Information*

Codename	Racial or Ethnic Identity	Gender Identity	Organization Size	Career Stage	Completed Logs	Change 1	Change 2
Apricot	White	Female	large	middle	4	making my own schedule	remote with multiple sites
Asparagus	White	Female	large	middle	4		
Bittersweet	African American	Female	large	middle	8		
Brick Red	White	Female	large	later	8	first time as a remote employee	
Chestnut	Hispanic/White	Female	large	middle	4	different job duties	
Copper	White	Female	large	early	4	different industry	part-time to full-time
Denim	Asian	Female	large	early	8	first time as a remote employee	
Goldenrod	Hispanic/White	Female	large	middle	4	different industry	different culture
Granny Smith Apple	Asian	Male	small	early	4	first time with large org	
Jazzberry	Asian	Female	large	early	8	more diversified global team	
Lemon	White	Male	large	early	8	move into leadership role	
Magenta	African American	Male	large	later	8	different industry	first time as a remote employee
Mahogany	White	Female	large	later	8	different industry	
Maroon	White	Male	large	early	8	longer commute	
Mauvelous	White	Male	large	later	8	different industry	shorter commute
Melon	White	Female	large	later	8	first time with large org	
Neon	White	Female	large	middle	4	a promotion	

Codename	Racial or Ethnic Identity	Gender Identity	Organization Size	Career Stage	Completed Logs	Change 1	Change 2
Olive	White	Nonbinary	large	later	8	different job duties	
Orchid	Asian	Female	large	early	8	different job duties	first time as a remote employee
Peach	White	Female	large	middle	8	very different culture	first time as a remote employee
Periwinkle	White	Female	large	later	8	different industry	remote with travel
Plum	African American	Female	small	early	8	different job duties	hybrid and flexible schedule
Razzle	White	Female	small	middle	8	different industry	
Dazzle Rose							
Robin's Egg	White	Female	small	middle	8	very different culture	first time as a remote employee
Seagreen	White	Female	large	early	5	different industry	hybrid
Shamrock	Indian	Male	large	early	4	different industry	was 100% remote to hybrid working location
Silver	White	Male	large	later	8		
Skyblue	White	Female	medium	middle	8	different job duties	shorter commute
Spring	White	Female	medium	early	6	different industry	different software programs
Tangerine	White	Male	small	middle	4	different industry	first time for virtual onboarding
Timberwolf	White	Male	large	later	7	moved to a different country	
Tumbleweed	White	Female	large	middle	8	different industry	
Turquoise	South Asian	Female	large	early	5	different industry	
Wisteria	White	Male	large	later	8	different job duties	

Table 3.2*Participant Geographic Locations*

Location	<i>n</i>	%
Pennsylvania	9	26
California	4	12
Arizona	2	6
Canada	2	6
Georgia	2	6
Massachusetts	2	6
New York	2	6
United States	2	6
Washington	2	6
Florida	1	3
Illinois	1	3
Minnesota	1	3
North Carolina	1	3
Ohio	1	3
Remote	1	3
Switzerland	1	3

Table 3.3*Participant Work Industries*

Industry	<i>n</i>	%
Education	4	12
Marketing	4	12
Finance	3	9
Research	3	9
Retail	3	9
Fundraising	2	6
Manufacturing	2	6
Medical Supplies	2	6
Security	2	6
Software Development	2	6
Electric Utility	1	3
Front Desk Receptionist	1	3
Healthcare	1	3
Industrial Automation	1	3
Insurance	1	3
Management Consulting	1	3
Sales	1	3

Recruitment and Sampling Strategy

My initial sample goal was 30 participants, based on previous diary studies (Fisher & To, 2012; Ohly et al., 2010; Sim et al., 2018; Sonnentag, 2001). Sandelowski (1995) recommended a sample size of 10 to 50 cases with 100 to 200 units of observation for qualitative studies. I also had the ability to continue to recruit participants to replace dropouts and until reaching saturation, or a condition in which my analysis yielded no new codes, no new categories, and no new themes (Fusch & Ness, 2015; Saunders et al., 2018; Sim et al., 2018). Initial sampling and demographic goals and actuals are shown in Table 3.4.

Table 3.4

Demographics Sampling Goals and Actuals

U.S. Census Demographic Categories	Pennsylvania Population %	Sampling goals (<i>n</i>)	Actual <i>n</i>	Actual %
All	100	30	34	
Female	51	15	23	68
Male	49	15	10	30
Nonbinary	n/a	n/a	1	3
White alone	81	25	23	68
African-American	12	4	3	9
Hispanic or Latino	8	3	2	6
Asian	4	2	6	17
Native Hawaiian and Pacific Islander, American Indian and Alaska Native	1	1	0	0
Small employers	n/a	10	5	n/a
Medium employers	n/a	10	2	n/a
Large employers	n/a	10	27	n/a

I used a purposeful sampling for maximum variation in participant demographics and workplace types to address a limitation of previous research, which often used homogeneous groups of participants or surrogates in experimental approaches. Inclusion

criteria were: participants had to be 18 years of age or older, able to consent in English, who had been hired and would start their new job within the next week or had started within the past week. They had to be able to access the online data collection instrument. Exclusion criteria were: anyone under 18 years old and/or who did not have ability to consent in English. Participants who met the inclusion criteria for the study were asked to complete a weekly journal entry for at least four and up to eight weeks and to participate in at least one check-in interview.

To recruit participants, I posted announcements (Appendix A) on LinkedIn daily starting on February 4, 2022. I also provided copy-and-paste announcements (Appendix A) to my connections asked them to post them and share them until I surpassed my sampling goal by at least 20 percent based on my anticipated drop-out rate (Ohly et al., 2010). LinkedIn is a free social media platform for networking, recruiting, and job-seeking (Johnson, 2019). Using social media as a recruitment tool is an emerging method (Stokes et al., 2017), but has proven to be effective in targeting populations that are hard to reach (Gelinias et al., 2017; Stokes et al., 2017). I used passive recruitment techniques or “distributing recruitment materials (ads, posters, flyers) with the aim of attracting potential participants to contact the research team for more information and for consideration of enrollment” (Gelinias et al., 2017, p. 5).

Interested prospects were sent to my onboarding study website (Appendix B) to read the description of the study, try a sample version of the diary instrument, read the informed consent information, access the screening questionnaire on Qualtrics, and contact the investigator if they wished. In total, during the recruitment window, from

February 4 to May 27, 2022, 87 individuals started and 75 completed the screening questionnaire.

- Of the 75 recruited individuals who completed the screening questionnaire, 23 (31%) prospects were rejected because they did not meet the screening criteria. All (100%) rejections were for a too early start date, for example they had already been at their new job for more than two weeks.

- Of the initial 75 recruited individuals who completed the screening questionnaire, 52 (69%) qualified prospects were enrolled in the study on a continuing basis and scheduled to create their first log within a week of their first day of the new job.

- Of the 52 enrolled participants, 18 (35%) dropped out before completing four logs. Their data were not included in the analysis because member-checking could not be conducted.

- Of the 52 enrolled participants, 34 (65%) completed the study.

- Of the 18 dropouts, 5 completed a post-study drop-out survey. The reasons they chose for dropping out were: got busy/didn't have time ($n=3$) or missed a logging due date ($n=2$).

Data Collection

The data were gathered with a diary study, using the ECIT prompts, hosted on the Qualtrics online survey platform (Appendix D). Prospects were directed to a qualifying survey, the "Onboarding Screening Questionnaire" (Appendix C), to ascertain whether the individuals gave consent, met the inclusion criteria for the study, and to collect

demographic background information. Individuals who consented and qualified received instructions on next steps by email within 24 hours. Participants were asked to document in the online onboarding log the helping and hindering factors and hope items at least once per week or whenever a critical incident happened for four to eight weeks. Logs were downloaded from Qualtrics once or twice per week, imported into NVivo, coded to the respective case and study week, then analyzed and coded for helping, hindering, and hope incidents. After each participant submitted their weekly log, an email reminder was scheduled in Qualtrics to prompt them to submit the next one. The investigator checked in with study participants after four log entries and after eight log entries. During the check-in interviews, which typically took 15 to 20 minutes, the investigator shared the factors and categories with the participants for the purpose of member-checking, one of the ECIT credibility checks. The check-ins were conducted via Zoom with the participant's video off, and they were not recorded. The investigator took notes during the check-ins, and the notes were imported into NVivo for analysis. Immediately after each check-in, the investigator sent the participant a \$25 Amazon e-gift card.

Instrumentation

An online screening questionnaire (Appendix C) and diary study collection instrument called the "onboarding log" (Appendix D) were created for this study to collect participants' reports about onboarding. Every time they accessed the log, participants saw written information about the purpose of the study and instructions about when and what to record. Notes were taken during the mid and closing check-in

interviews using protocol forms (Appendices E and F). Table 3.5 shows the prompts used in the onboarding log.

Table 3.5

ECIT Prompts in the Onboarding Log

Purpose	Type	Prompt
To differentiate the participants/cases	Open-ended prompt	Enter your codename
To stimulate recall	Open-ended prompt	Thinking about the past week at your new workplace, how has your adjustment been going?
To help participants reflect on their week, and stimulate recall	Graphic sliding scale	Based on your response to the first question, how would you rate (with 10 being excellent) your adjustment to your new job this week?
To gather helping incidents	Open-ended prompt	Thinking about the past week, what was helpful to you in adjusting? Please say as much as you can to describe what happened, what it meant to you, how it helped, what led to it, and what happened next.
To gather hindering incidents	Open-ended prompt	Thinking about the past week, what made it difficult for you to adjust? Please say as much as you can to describe what happened, what it meant to you, how it hindered, what led to it, and what happened next.
To help participants reflect, and to stimulate recall	Graphic heat map	Click on the area of the emotion wheel that best reflects how you are feeling about your adjustment this week?
To gather hope items	Open-ended prompt	Reflecting on your experiences this week, what would you hope for to help with your adjustment?
To support rapport with researcher	Open-ended prompt	Anything else you'd like to share or ask of the researcher?

Qualtrics is an online survey platform and has been employed for a variety of quantitative, qualitative, and mixed-methods diary studies administered over daily or weekly intervals (Marcusson-Clavertz et al., 2019; Goldberg et al., 2019; Saltzman et al.,

2021). Using an online diary promotes engagement and persistence by allowing logs to be completed on smartphones or other devices, at the convenience of the participant (Goldberg et al., 2019). Qualtrics allows the researcher to monitor compliance and send reminders and encouragement (Goldberg et al., 2019; Saltzman et al., 2021).

Role of the Researcher

In qualitative studies the researcher is the instrument, and the preconceptions or *a priori* knowledge (Tufford & Newman, 2012) of that researcher directly influence their choice of topic, method, and analysis and interpretations of the data. I have a personal interest in the topic of onboarding and exploring how it can be implemented better to serve the interests of both new employees and the organizations where they work.

When I was promoted to supervisor, newly responsible for hiring and training, I planned an onboarding program to help new employees get adjusted. I had recently completed a new supervisor training program for which I read a book about onboarding. One intervention I implemented was to take them in the elevator up to the top floor of our building where the vice presidents had their offices, and walk the new hires around each level, introducing them to everyone we encountered as we made our way back down to our floor. The leaders and other current employees loved meeting the newcomers and thanked me for bringing them around. The newcomers also thanked me and said how much they appreciated the tour and introductions. Later, however, when they felt comfortable telling me the whole truth, they said it was overwhelming; they appreciated the intention and did not want to complain but would have preferred a different way of meeting their new colleagues. I took them on the introductions tour to help them, but the help was minimal, and unintentionally I may have hindered their adjustment in the short

term. Later, given the opportunity, the newcomers told me what they preferred or would hope for instead.

Prior to being a supervisor responsible for onboarding, I was a newcomer, left on her own to figure out how to adjust to her new position and new organization. Those unsatisfactory experiences led me to complete a master's thesis on onboarding and try to advocate for better onboarding practices at my workplace, with little success. I have wondered how many others who started a new job were also not onboarded and how that neglect influenced those individuals as well as the organization in a negative way. I began to connect equity and diversity abuses I experienced and observed around me, such as lack of upward career mobility and the persistence of microaggressions or microinequities, to lack of onboarding. I also noticed that even when the enterprise neglects onboarding or conducts it using ineffective tactics, employees persist anyway, for better or worse, revealing that the critical perspective is how the individual makes sense of and adapts to their new situation, not simply what is done to them. I acknowledge that I approached this study with the assumption that the majority of participants would experience poor or neglected onboarding. I needed to be aware and careful to not lead or manipulate participants into confirming my opinion. In my analysis, I needed to be clear in how I coded and interpreted the data to tell their story—not mine. Careful adherence to the ECIT credibility checks throughout my study aided my validity. I piloted online qualitative data collection instruments in two previous studies: for my master's paper and for a workplace project. I found participants were willing to provide me with written details of their experiences.

My goal was for participants to tell their onboarding experiences to provide the missing perspectives of the newcomer who experiences onboarding, to produce results that can be applied in a workplace setting by HRD professionals or by the newcomers themselves to improve onboarding practices and outcomes.

Data Analysis

The same data analysis strategy as was used for the literature review was used for the collected data and is shown in Table 2.2. Combining ECIT and a GT-influenced inductive method of analysis means my general approach was to start with the ECIT framework—a middle level of the coding and analysis process—and work “down” to *in vivo* tags, then work “up” from the *in vivo* tags to construct codes, groups, categories, themes, and concepts. *In vivo* coding, or the participants’ own words, was preserved as much as possible. Although my chapter 2 literature review provided important background information for this study, those results were not used as prefigured codes or categories, except for preparing me to identify individual helping attitudes or actions taken by the newcomer, which was not a separate prompt in the onboarding log. Butterfield et al. (2010) also noted the importance of self-helping attitudes and actions among workers experiencing change. All the factors and categories were constructed out of the data I collected from participants.

Scope of Data Collected

The data collected in Qualtrics were downloaded as an Excel spreadsheet each week and imported into NVivo. Participants created 278 logs. Each log included five responses that were used in the analysis for a total of 1,390 units of observation.

Participants' responses to the prompts in the onboarding log varied. Some participants provided short responses of around 20 words. Others provided much longer responses, with one reaching 920 words. Between the two extremes were those who provided a description of the incident and the context in which it occurred in about 75–200 words.

Table 3.6 presents an example of a log entry from one participant who provided typically shorter responses. Table 3.7 presents an example of a log entry from a participant who typically provided longer responses.

Table 3.6

Sample Participant Short Log

Prompt	Participant Response
Thinking about the past week at your new workplace, how has your adjustment been going?	Great!
Thinking about the past week, what was helpful to you in adjusting? Please say as much as you can to describe what happened, what it meant to you, how it helped, what led to it, and what happened next.	The people are great and very helpful. From the receptionist to the CEO, they are all so friendly and helpful.
Thinking about the past week, what made it difficult for you to adjust? Please say as much as you can to describe what happened, what it meant to you, how it hindered, what led to it, what happened next.	No difficult, but prior programs in place that haven't been used correctly or at all. Trying to see why not being used? How long in place? What needs fixed? Etc.
Reflecting on your experiences this week, what would you hope for to help with your adjustment?	More of the same. Support!
Anything else you'd like to share or ask of the researcher?	No

Table 3.7*Sample Participant Long Log*

Prompt	Participant Response
Thinking about the past week at your new workplace, how has your adjustment been going?	Pretty standard. A little overwhelming at times, because there's so much to learn about how the company operates, but I'm enjoying the challenge.
Thinking about the past week, what was helpful to you in adjusting? Please say as much as you can to describe what happened, what it meant to you, how it helped, what led to it, and what happened next.	<p>The dept mgr is really open about his management style. He's there for his employees, he'll do whatever he can to make sure people can succeed, but ultimately we're all responsible for our own careers and path in the company. If you mess up, he'll work with you to figure out what happened and how to fix it/prevent it from happening again. If you continue to make the same mistakes, you'll be called for a "discussion," which is where they document the repeated mistakes and come up with a plan to resolve the issue. After that, it's time for the steps of discipline/discharge.</p> <p>I really appreciate his honesty. You know where you stand with him and the company, and it makes it a lot easier to ask questions, even if I think they sound silly or stupid. He has three assistant team leaders (ATL - same position I'm training for), and they've been really helpful and supportive as well. One of them spent about 25 minutes with me yesterday, explaining the best way to sort out our inventory delivery, get things dated and into storage, rotating stock between three different storage areas, etc. So to make a long story short - you need to know the people you work with have your back! :-)</p>
Thinking about the past week, what made it difficult for you to adjust? Please say as much as you can to describe what happened, what it meant to you, how it hindered, what led to it, what happened next.	<p>Like last week, a big part of the difficulty lies with me and my INTJ brain, which wants me to be perfect from the start and doesn't like doing things that I'm not automatically good at. (It also hates when I end a sentence with a preposition.)</p> <p>I came in on Friday (after working 11.5 hours and closing the dept on Thursday because we had call-offs) to find a giant U-boat (https://www.google.com/search?q=uboa&client=firefox-b-1-d&source=lnms&tbn=isch&sa=X&ved=2ahUKEwjexOmW8_X2AhUjZjUKHQ9ICLIQ_AUoAXoECAEQAw&biw=2020&bih=1067&dpr=2) full of packages. Our daily inventory came in and had to be sorted, unboxed, labeled/dated and put away. And that was going to be my job for the day, because again we had call-offs. It was a totally reasonable request, esp since I had some experience doing inventory at my previous job, and the manager knew I could handle it.</p> <p>The problem was, I panicked a little. I got started, and after about 10 minutes I figured out a game plan, and then I asked an ATL if what I planned would work and what I could do to be more efficient. But in that first 10 minutes, all I could think was "I can't do this, I'm going to fail, I need to find another job, I should quit..."</p>

Reflecting on your experiences this week, what would you hope for to help with your adjustment?	I mean, I have the skill set to figure out how to do the job, even if I don't know exactly how to do it yet. And I KNOW that, logically. And given a few minutes, I DO figure out what to do or who/where I can go to get the information I need. I just get a little freaked out thinking that everyone will think I'm some sort of a failure if I'm not perfect from the start.
Anything else you'd like to share or ask of the researcher?	<p>So to (again) make a long story short - people need to understand how they react to different situations like new job stress. That way you don't psych yourself out before you even get started.</p> <p>I need to be stronger mentally, a little more resilient, a little more thick-skinned. And maybe find a way to compartmentalize work so it's just work and not a reflection of who I am as a person.</p> <p>Honestly, the support I'm getting from the dept mgr and the people in store mgmt is really impressive. They want us to succeed and if we're willing to do the work, they're available when we need them.</p> <p>I just need time to learn the huge list of things that are part of the job. I hope you're having a good week and that things are going well with your research! And if you're in State College - welcome to spring, where the sun shines for like three days in April. :-)</p>

NVivo

All data from the onboarding logs and check-in interviews were imported into NVivo CAQDAS. NVivo helps researchers analyze large qualitative text datasets such as interviews, questionnaires, and articles more efficiently (Fielding et al., 2013). It provides an overall project management site and helps to document analytical decisions, which aids in validity and reliability (Bernard et al., 2016; Silver & Lewins, 2014; Welsh, 2002). For example, any code can be tracked back to its specific log entry to review surrounding context, date created, study week, and case. I completed the NVivo core skills certification course on October 8, 2020, and the NVivo certified expert course on July 2, 2021. For each participant in the study, a case was created in NVivo and

demographic variables were used to classify all the cases. The data from the onboarding logs were imported into NVivo on a weekly basis and assigned to the appropriate cases.

Coding

Although using ECIT provides a framework of helping factors, hindering factors, and hope items, within that framework, my coding process was inductive and cyclical. I followed the GT-influenced process of open, axial, and selective coding (Charmaz, 1990). First, I read each log entry for comprehension and reflect on the data. During the open coding phase, as I re-read, I highlighted and tagged *in vivo* units of meaning such as phrases, sentences, or paragraphs that reflected a helping factor, hindering factor, or hope, following the definitions shown in Table 3.8.

Table 3.8

Definitions of Categories

ECIT Category	Definition	Use	Example <i>in vivo</i> codes
Helping	Experiences or conditions that occurred and helped newcomer's onboarding	Participant describes the incident as helpful or positive, or that they appreciated the incident or actor, or entered the incident in response to the helping prompt.	It definitely helped working with my "onboarding buddy" to review tasks and customer projects to help see/learn the way they run projects or approach tasks. She was so helpful in guiding me to identify ways to look at the data or project I was working on (Goldenrod, April 22, 2022).
Hindering	Experiences or conditions that occurred and	Participant describes the incident as negative or not	There's already so many emails and Teams chats in

	undermined or frustrated the newcomer's onboarding	helpful, causing frustration or emotional distress, or entered the incident in response to the hindering prompt.	just a month, it's an information overload (Neon, June 29, 2022).
Hope	Experiences or conditions that did not occur, but the newcomer expressed a desire, hope, or wish for them to occur	Participant uses words such as wish, want, would, should, prefer, suggest, if, or recommend, or enters incident in response to the Hope prompt.	It would be helpful I could find a chance to meet in person with my supervisor because having a face-to-face conversation could significantly save my time spent on writing emails for communicating small things (Granny Smith Apple, April 17, 2022).

I preserved the participant's actual words as long as possible in my process. I considered these initial tags as pre-codes, focused on identifying and extracting them but not grouping them yet. Once I gathered a substantial number of tagged units from at least a quarter of the participants' logs, I started axial coding. In this phase, I grouped the tagged units into initial categories within my helping, hindering, and hope categories. Working in one category at a time, I reflected on how my codes were related to each other, how similar or disparate they were, and how certain tagged units could have fit more than one code. The open and axial coding phases were repeated with the data until saturation or exhaustiveness was achieved, and no new meaningful tags can be found or gathered into codes (Fusch & Ness, 2015; Saunders et al., 2018). In the selective coding phase, working by category, I considered the codes and how they could be combined or divided to most authentically reflect the participant's reporting and used the ECIT

categories to find concepts, themes, models, and the story of the data (Charmaz, 1990; Rossman & Rallis, 2017; Wolfswinkel et al., 2013).

Trustworthiness of Findings

Qualitative work is inherently subjective, as all researchers come to their questions or what they wonder about (Van Manen, 2002) with preconceptions or *a priori* knowledge (Tufford & Newman, 2012). Bracketing, memoing, and the nine ECIT credibility checks were used to enhance trustworthiness in this study.

Bracketing is a practice to enhance trustworthiness by shielding the researcher from internalizing the emotions of the participants; it requires being explicit about one's preconceptions and transparent about explaining how one is using them to frame the analysis (Tufford & Newman, 2012). Memoing is a consistent and routine self-dialog that brings out implicit assumptions (Charmaz, 1990). This practice also reflects an ongoing process of structured self-reflection that Creswell (2016) noted as a critical formative part of the research process informing one's axiological assumptions. Rossman and Rallis (2017) also noted that awareness of one's self-concept shapes how the qualitative researcher constructs knowledge and perceives research participants.

The ECIT nine credibility checks are 1. Descriptive validity; 2. Interview fidelity; 3. Interrater agreement on initial incident extraction; 4. Exhaustiveness; 5. Participation rate of around 25 percent; 6. Interrater agreement of 80 percent on categorization; 7. Member checking; 8. Expert review; and 9. Theoretical support in the literature

(Butterfield et al., 2010). Table 3.9 shows how my research design incorporated the credibility checks.

Table 3.9

Credibility Checks Procedures

Credibility Checks	Research Design Procedures
1. Descriptive validity	Participants recorded what they felt was relevant and important using their own words. <i>In vivo</i> coding preserved throughout analysis process.
2. Interview fidelity	Qualtrics was used to collect responses to diary prompts that were consistent within and between participants for the entire study period. Using NVivo, all codes can be tracked to their originating log entry and participant.
3. Interrater agreement: extraction of incidents and items	Two independent coders were each given a sample of the logs for 5 participants to identify the helping incidents, hindering incidents, and hope items. Discrepancies were discussed and resolved by reviewing the actual participant's logs to reach agreement.
4. Exhaustiveness	Recruiting was conducted until sampling goals were reached. Coding and analysis were continued until there were no new categories with meaningful participation rates.
5. Participation rate	Codes per case for each factor and category were calculated and shown in NVivo. A minimum 25% participation rate was used.
6. Interrater agreement: categories and coding	Categories and coding of helping incidents, hindering incidents, and hope items were reviewed with independent coders who could challenge any coded incident or category placement. Discrepancies were discussed and resolved by reviewing the actual participant's logs to reach agreement.
7. Member checking	Mid and closing check-in interviews were conducted via Zoom with all participants. Coding and categories were shared and discussed, notes were taken, and changes were made if needed.
8. Expert review	Two experts on the topic of onboarding were sent the list of categories for their review.
9. Theoretical support	Provided by Chapter 2 Literature Review using ECIT.

Member checking is a key aspect of ECIT. Following Butterfield et al. (2009), during the check-ins, I shared the factors that I identified as helping, self-helping, hindering, and hopes from their log entries and all the categories I constructed from their

and other participants' coded entries. I used *in vivo* coding so the participants could see their actual words and how I interpreted them. I shared my screen so participants could see the NVivo project workspace and the categories that were being constructed from their log entries. During the check-ins, I asked participants to confirm when I categorized their entries correctly and to alert me when I categorized the entries incorrectly, and they did. The participants often provided me with additional data on their experiences during these check-in interviews. I took notes, imported them into NVivo, and included them in the analysis.

Interrater agreement is a key aspect of ECIT. For my interrater agreement procedure, I recruited two doctoral candidates who are also using ECIT for their research, so they would be familiar with the method. I sent each independent coder a set of five participant's logs and instructed them to identify helping incidents, hindering incidents, and hope items. In total, the logs for 10 participants (29%) were used for this credibility check, exceeding the 25% guideline (Butterfield et al., 2009). I did not give my coders any additional instructions or share with them the categories I was building within the ECIT framework. The coders returned their lists of incidents from these logs, and I calculated the percentage of agreement (Butterfield et al., 2009). Based on a lower agreement for helping incidents, I asked both independent coders to take another look and this time gave them some additional information about looking for individual helping incidents as well as looking for helping incidents that may have been reported in response to the other prompts. The initial lower levels of agreement were the result of the independent coders identifying fewer incidents than I did. When I coached them to also look for individual helping, hindering, and hope incidents, that improved the agreement.

Neither coder disputed with the incidents I identified. The second pass resulted in better agreement as shown in Table 3.10.

Table 3.10

Interrater Agreement for Incident Extraction

Independent Coder	Helping		Hindering		Hopes	
	Initial result	Second pass	Initial result	Second pass	Initial result	Second pass
Coder 1	49%	85%	93%	100%	88%	96%
Coder 2	78%	100%	81%	100%	100%	100%

Next, I met individually with each independent coder to review all the helping incidents, hindering incidents, and hope items, and all the categories. In a similar way as I did for each study participant, I shared my screen and the NVivo project window so independent coders could see and challenge any item. Questions were resolved by clicking into the original log entry to see the context or reviewing the check-in notes for that participant. In this way, 100% agreement on the coding and categories was reached. Based on the feedback and questions from the independent coders, I revised some of the category names and moved or copied some codes into other categories.

Exhaustiveness or saturation is reached when no new meaningful tags can be found or gathered into codes (Fusch & Ness, 2015; Saunders et al., 2018). In ECIT, this is documented by a record of when new categories emerge and the point at which no new categories emerge (Butterfield et al., 2009). Table 3.11 documents the emergence of new categories.

Table 3.11*Emergence of New Categories*

First Incident Extraction Date	Participant	Categorized	New Categories Emerged
3/5/22	Chestnut	3/12/22	4 new HE
3/5/22	Wisteria	3/19/22	1 new HE
3/5/22	Chestnut	3/27/22	1 new HE, 1 new HI
3/5/22	Skyblue	3/27/22	1 new HE
3/5/22	Wisteria	3/27/22	1 new HI
3/5/22	Chestnut	4/3/22	1 new HI
3/5/22	Chestnut	4/16/22	1 new HO
3/12/22	Melon	3/12/22	1 new HO
3/12/22	Timberwolf	3/19/22	1 new HE
3/12/22	Wisteria	3/19/22	1 new HO
3/12/22	Apricot	3/27/22	1 new HI
3/12/22	Timberwolf	3/27/22	1 new HI
3/12/22	Wisteria	3/27/22	1 new HE
3/12/22	Granny Smith Apple	3/27/22	1 new HI
3/12/22	Peach	3/30/22	1 new HO
3/12/22	Granny Smith Apple	4/2/22	1 new HE
3/12/22	Timberwolf	4/3/22	1 new HE
3/12/22	Timberwolf	7/22/22	1 new HE
3/19/22	Goldenrod	3/19/22	1 new HE
3/19/22	Skyblue	3/27/22	1 new HE
3/19/22	Granny Smith Apple	4/11/22	1 new HE
3/21/22	Wisteria	5/1/22	1 new HI
3/22/22	Peach	3/27/22	1 new HI
3/22/22	Timberwolf	3/27/22	1 new HI
3/27/22	Mahogany	3/27/22	1 new HO
3/27/22	Timberwolf	4/11/22	1 new HI
3/27/22	Mauvelous	5/1/22	1 new HE
3/30/22	Apricot	5/22/22	1 new HI
4/3/22	Mahogany	4/3/22	1 new HE
4/9/22	Wisteria	4/16/22	1 new HO
4/9/22	Mahogany	6/4/22	1 new HE
4/11/22	Seagreen	4/11/22	No new categories emerged

First Incident Extraction Date	Participant	Categorized	New Categories Emerged
4/16/22	Mauvelous	4/16/22	1 new HE
4/18/22	Tumbleweed	5/1/22	1 new HI, 1 new HO
4/18/22	Mahogany	4/18/22	1 new HE
4/20/22	Copper	4/20/22	No new categories emerged
4/24/22	Spring	5/1/22	1 new HO
4/24/22	Olive	4/24/22	No new categories emerged
4/24/22	Bittersweet	4/24/22	No new categories emerged
4/24/22	Brick Red	4/24/22	No new categories emerged
4/24/22	Robin's Egg	4/24/22	No new categories emerged
4/30/22	Plum	5/13/22	1 new HE
4/30/22	Magenta	4/30/22	No new categories emerged
4/30/22	Periwinkle	4/30/22	No new categories emerged
4/30/22	Orchid	4/30/22	No new categories emerged
4/30/22	Silver	4/30/22	No new categories emerged
5/3/22	Asparagus	5/3/22	No new categories emerged
5/9/22	Maroon	5/9/22	No new categories emerged
5/9/22	Denim	5/9/22	No new categories emerged
5/9/22	Lemon	5/9/22	No new categories emerged
5/11/22	Tangerine	5/11/22	No new categories emerged
5/15/22	Jazzberry	5/15/22	No new categories emerged
5/22/22	Turquoise	5/22/22	No new categories emerged
5/29/22	Razzle Dazzle Rose	5/29/22	No new categories emerged
5/31/22	Shamrock	5/31/22	No new categories emerged
6/7/22	Neon	6/7/22	No new categories emerged

Note. HE = Helping Critical Incidents; HI = Hindering Critical Incidents; HO = Hope Items.

Expert review is an important credibility check for ECIT (Butterfield et al., 2009).

I recruited two onboarding experts to review my final categories. Expert one is a senior organizational strategist at the University of California, Berkeley, who is responsible for onboarding at the university. Expert two is a faculty member in Educational Leadership at the University of North Carolina at Charlotte, with previous professional experience directing onboarding, and who has also conducted research on onboarding. Both experts said they found the categories useful, were not surprised, and did not think anything was missing.

Assumptions

This study assumed that enough employees were being hired and onboarded to provide an adequate sample with the diversity I sought, and that enough individuals will also be interested in the topic and diary method. It assumed that study participants would be compliant, persistent, and honest in their reporting. I assumed that my thank-you Amazon e-gift cards were of sufficient value to encourage participants to continue logging for the eight weeks, but not coercively so. I assumed that participants had enough education to be able to write and reflect on their onboarding experiences. I assumed I would be able to understand what they wrote.

Chapter Summary

This chapter presented the method for the current study. First, the rationale was presented for using a qualitative approach to data collection and analysis based on the purpose of the study—to explore helping, hindering, and hope incidents in newcomer onboarding, from their perspective, using their words, and acknowledging the newcomer as an active agent the process. Second, the research questions were reviewed: 1. What helps newcomers' successful onboarding? 2. What hinders newcomers' successful onboarding? 3. What hopes do newcomers have for successful onboarding? Third, based on the purpose and research questions, the research design was presented. The research design is a combination of ECIT protocol with modifications. My use of “hopes” in place of “wishes” is based on newcomers' self-agency and the data collection coinciding with the onboarding process. In place of interviews, I used a diary study for data collection. A

GT-influenced inductive process of data analysis was outlined. Fourth, the research approval from the IRB and ethical considerations for workers as a vulnerable population was shared. Fifth, the study participants' demographic information and recruitment and sampling strategy to obtain diversity among participants was presented. Sixth, the data collection process including screening, four to eight-week logging phase, and check-in interviews was outlined. Seventh, information was presented on the instrumentation and Qualtrics internet-based survey platform. Eighth, the data analysis strategy, using ECIT framework, GT-influenced open, axial, and selective coding process, NVivo qualitative data analysis software platform, and codebook were presented. Ninth, trustworthiness of findings by using bracketing, memoing, and the ECIT nine credibility checks was discussed. Finally, assumptions were shared.

Chapter 4

Findings

This chapter reports on the helping factors, hindering factors, and hope items the 34 participants documented in their onboarding logs and in the check-in interviews. Each participant provided four to eight logs over as many weeks, starting during their first week at their new job. Each log was coded to its respective participant case and study week. Within each log, each mention of a helping incident, hindering incident, or hope item was extracted as codable unit of meaning. Similar units of meanings were gathered into factors and categories. Because this was a diary study with repeated observations over a period of time, it was longitudinal (Hyers, 2018). In addition to the usual ECIT results, week-by-week findings of helping factors, hindering factors, and hope items will also be presented. The participants were all undergoing a similar experience—onboarding at a new workplace—however, they were not a group going through it together since they were entering different types of workplaces in different locations. Finally, in contrast to most other studies of onboarding, these findings are from the newcomer’s perspective.

Table 4.1 shows an overall count of the helping factors, hindering factors, and hope items from the analysis. Participants by count and percent are shown in the Case column. Critical incidents and hope items by count and percent are shown in the Incidents and Items column. All participants reported helping factors, hindering factors, and hope items. The rest of this chapter describes more fully the findings related to helping factors, hindering factors, and hope items.

Table 4.1*Frequencies for ECIT Categories and Incidents*

ECIT Categories Overview	Cases		Incidents and Items	
	<i>n</i>	%	<i>n</i>	%
Helping incidents	34	100	741	54
Hindering incidents	34	100	386	28
Hope items	34	100	244	18
Total	34	100	1,371	100

Helping Factors

Helping factors are incidents from the onboarding logs and check-in interviews that describe actions, experiences, or conditions that occurred and helped participants' onboarding. Mostly they came in response to the prompt: "Thinking about the past week, what was helpful to you in adjusting? Please say as much as you can to describe what happened, what it meant to you, how it helped, what led to it, and what happened next." Some helping incidents were reported in response to other prompts. All participants reported helping incidents. In total, 741 helping incidents were collected and categorized. For clarity, I have divided the helping factors into two groups: organizational factors and individual factors. Within the helping factors, 67% were organizational and 33% were individual.

Organizational helping factors are policies and resources provided or conditions created by the organization, or actions taken by workplace agents (i.e., managers, coworkers, human resources professionals). Although not a separate prompt in the log, individual factors are actions the newcomer takes on their own behalf, often signaled by

the use of “I” and a verb in the active voice. Table 4.2 shows the cases and incidents for helping factors. There were 741 total helping incidents, and 34 cases or participants (100%) reported helping factors. The organizational helping factors are presented first. Within the organizational factors, the factors are presented from most to least frequent based on the participation rate or percent of cases reporting the factor. In a situation where two or more factors have the same participation rate, the number of incidents is then used to determine which should be listed first. For example, *Being Welcomed*, *Buddy or Mentor*, and *Clear Expectations* all have a 44% participation rate, because 15 out of 34 participants reported those factors. They are therefore listed in decreasing order by the number of incidents—34, 30, and 24, respectively. The individual helping factors are presented second. As with the organizational helping factors, they are listed in decreasing order by participation rate and then incident number. In grouping the factors by organizational and individual sets, an individual helping factor with a higher participation rate than some organizational helping factors may be listed lower in the table. For example, individual factor, *Asking Questions*, has 71% participation rate, which is the fourth highest overall. Four individual factors are under the 25% viability threshold.

Table 4.2*Frequencies for Helping Factors*

Helping Factors	Cases		Incidents	
	<i>n</i>	%	<i>n</i>	%
741 Incidents				
Total Helping Factors	34	100	741	100
Organizational	34	100	496	67
1. Productive Interactions	29	85	86	13
2. Work Assigned	26	76	59	9
3. Manager Support	24	71	75	11
4. Introductions	23	68	61	9
5. Onboarding Plan	20	59	36	5
6. Effective Training	17	50	40	6
7. Being Welcomed	15	44	34	5
8. Buddy or Mentor	15	44	30	4
9. Clear Expectations	15	44	24	4
10. Given Time to Learn	12	35	19	3
11. Work-life Balance	12	35	19	3
12. Resources Provided	10	29	13	2
Individual	31	91	245	33
1. Asking Questions	24	71	51	8
2. Feeling Confident	20	59	57	8
3. Prioritizing Needs	18	53	46	7
4. Positive Attitude	11	32	24	4
5. Observing Others	10	29	21	3
6. <i>Weekly Logging</i>	8	24	9	1
7. <i>Previous Experience</i>	7	21	12	2
8. <i>Taking Notes</i>	6	18	20	3
9. <i>Helping Others</i>	3	9	5	1

Note. Factors in italics are below the 25% viability threshold.

Organizational Factors

Productive Interactions

Twenty-nine (85%) participants described experiences with coworkers that helped their onboarding. These productive interactions included responsiveness to questions, proactive communication, checking in, collaboration on work projects, constructive feedback, and helping the newcomer to learn about the culture. Here are a few example comments from the onboarding logs about productive interactions with coworkers:

“Talking with my new colleagues in the lab helped a lot. They provided me with suggestions about my role in the lab as well as feedback about my proposed research ideas” (Granny Smith Apple, 03/15/22). “Collaborating closely with a colleague. Checking-in with each other regularly throughout the day to exchange ideas, having video calls to brainstorm. They're easy to work with and I feel like we've made a lot of progress on our project” (Jazzberry, 06/03/22). “My team and the team I support are pretty good at giving feedback and encouragement. And I think that has been one of the biggest factors with my transitions. There is just a lot of honest feedback and encouragement” (Neon, 06/22/22).

Work Assigned

Twenty-six (76%) participants said they benefit by doing the work they were hired to do, however, they can only do it when the employer enables them, as their logs demonstrate through the use of phrases such as, “I was given,” “I am being provided,” “I have been assigned.” Here are a few example comments from the onboarding logs about being assigned work: “having projects that allow me to showcase my skills and knowledge is very beneficial” (Timberwolf, 04/11/22). Mahogany said:

Store inventory is usually the fourth Monday of the month, so April 24th is our inventory day. The other ATLS will be working Sunday & Monday, and the store manager and I will be doing the entire process, from counting what's in storerooms and coolers to scanning all the items in the deli, food service, and on the sales floor. It's a lot of work—about 4 hours on Sunday afternoon, and another 6 or 8 hours starting 3 am on Monday—but it's a GREAT opportunity to learn about everything from what we sell, sales figures, ordering, etc. I've done inventories before, but never in this depth so I'm sort of looking forward to it (04/17/22)

Manager Support

Twenty-four (71%) participants reported on the importance of regular one-on-one meetings with their manager as well as being able to contact the manager anytime with questions or concerns. Here are a few example comments from the onboarding logs about this factor: “1:1 meeting with my manager to discuss my progress” (Plum, 06/11/22).

Olive said:

Because this is a remote position, I was able to meet with my manager a couple times per day each day of the first week. I really appreciated having regular contact especially being remote because I am able to create a relationship with my manager (04/22/22)

Introductions

Twenty-three (68%) participants said “meet and greets” and other social opportunities to get to introduced to new colleagues are an important foundation for later productive collaboration. Here are a few example comments from the onboarding logs

about this factor: “Finding shared backgrounds, shared work ideas; making me feel more of the team and looking forward to working with the team (Wisteria, 04/17/22).” “There were a few large team meetings this week that helped me connect more dots of who does what and who I need to go to for different things” (Periwinkle, 06/17/22). Magenta said:

I attended a company sponsored Juneteenth Celebration event over the weekend. I met several members of the senior leadership team and had the opportunity to have extended conversations in a casual setting. I think these connections will be helpful when I have to interact with these teammates for work related issues in the future (06/19/22)

Onboarding Plan

Twenty (59%) participants described receiving an onboarding plan, schedule, process, or checklist. Here are a few example comments about this factor: “I have been given employee handbook, and a thorough onboarding portal” (Wisteria, 03/01/22). “The company has a whole onboarding process. There's 3 webinars to attend, a new hire section on the company intranet, and even an HR contact assigned to me” (Neon, 06/04/22). Peach said:

We had a very specific Asana-based task list that has all the onboarding things on it. You can check them off as you do them, or leave a comment for the task owner if you need assistance. It has been so nice (03/07/2022).

There has been a concerted effort by my management team to manage my schedule to keep the introductory meetings with peers high impact, but also spaced enough that I am able to process and reflect on all of the information, as well (Mauvelous, 03/25/22)

Effective Training

Seventeen (50%) participants identified effective training. Effective training is a component of an onboarding plan, but participants specifically perceived and identified it as training, or time set aside for the participant to learn something related their work responsibilities. Some of the training was in a group and some was individual. Participants identified aspects of effective training as shadowing others, hands-on, interactive, structured, allowing adequate time, and the ability to access training materials, like videos, on their own. Here are a few example comments from the onboarding logs about this factor:

We have our training in-person vs remotely. I think this interaction has been a game changer. There is both formal/informal training occurring. Not only are the trainers assisting us, we are helping each other in learning new systems and setting ourselves up for success. We have been given ample time to ask questions vs. we have to move along so we can get through the material. We are the important component vs the training materials (Brick Red, 04/21/22)

Plum also commented about effective training:

Structured training. 4 out of 5 days this week, I had 1-2 hours of onboarding with my manager, where she walked me through an aspect of my role using a slide deck and by sharing examples form her own work. In between these calls, I was assigned "homework" to look at more in depth. This structure was helpful to pace my learning (04/29/22)

Buddy or Mentor

Seventeen (50%) participants said they were assigned a buddy or mentor. The buddy or mentor can be a more experienced employee who provides formal or informal guidance. They can also be other new hires who started at the same time as the participant. Here are a few example comments from the onboarding logs about this factor: “I meet with her she always goes above and beyond and sends me background information I can use, about the company” (Melon, 04/08/22). Maroon said:

I am also paired up with a mentor of sorts, who shares a similar job title to me, but is also located in a different area. The role of this person is to ask other questions that may be better fit for a peer instead of a supervisor (05/09/22)

Goldenrod also commented about the helpfulness of a buddy:

It definitely helped working with my "onboarding buddy" to review tasks and customer projects to help see/learn the way they run projects or approach tasks. She was so helpful in guiding me to identify ways to look at the data or project I was working on. The best thing about my onboarding process has been having an onboarding buddy that I have check ins with to help learn about how to grow in my learning and in my role as an Account Manager (04/22/22)

Being Welcomed

Fifteen (44%) participants said they were welcomed. Here are a few example comments from the onboarding logs about this factor: “My coworkers being warm and welcoming helped the most. They didn’t necessarily help me with my work but they helped explain work culture as well as policy and procedures” (Seagreen, 04/11/22). “It's amazing how nice and helpful that everyone is at this company” (Melon, 04/25/22). “Being welcomed by my manager and her direct reports, getting welcome emails from

multiple people after my manager sent an announcement about my joining the department” (Periwinkle, 05/06/22).

Clear Expectations

Fourteen (44%) participants identified clear expectations as a helping factor. Here are a few example comments from the onboarding logs about this factor: “Really making sure that we all understand the expectations; the role and duties” (Brick Red, 04/28/22). “I really appreciate his honesty. You know where you stand with him and the company, and it makes it a lot easier to ask questions, even if I think they sound silly or stupid” (Mahogany, 04/02/22).

Work-Life Balance

Twelve (35%) participants identified work-life balance policies and culture as a helping factor. For some, it was a part the reason they accepted the position. Incidents in this category include having a shorter commute, being allowed to take a planned vacation soon after starting, working from home or hybrid scheduling, and having flexibility. Here are a few example comments from the onboarding logs about this factor: “Understanding that I can make my own schedule on a weekly basis” (Bittersweet, 05/21/22). “I am so glad I made the move to this new organization and I feel in such better balance in my life and I love the ability to have more space for creativity and relationship building” (Tumbleweed, 05/02/22).

Given Time to Learn

Twelve (35%) participants said having time to learn and reflect was helpful. Here are a few example comments from the onboarding logs about this factor: “Never felt rushed and [was] supported even when I made errors” (Chestnut, 02/23/22). “This week I

have been able to read through a lot of related documentation. This helped me understand the history of the work done on the team and get a self-paced way to learn” (Jazzberry, 06/03/22). “This week was less jammed pack with trainings, so I had more time to essentially breath[e]. I was able to review the platform and essentially go at my own pace” (Lemon, 05/15/22).

Resources Provided

Ten (29%) participants said being provided the resources they needed for their work as a helping factor. Here are a few example comments from the onboarding logs about this factor: “My laptop was ready for me and the HR rep led me through the setup” (Magenta, 04/30/22). “Finally getting the corporate card to pay for vendor credentialing background check information requirements” (Bittersweet, 04/28/22). “Resolving IT issue made things easier” (Denim, 05/15/22). “Having several different organizers; one for hours worked, one for daily meetings, one planner for events with emails/phone numbers/activities/my email names and passwords/and when routine calls take place” (Razzle Dazzle Rose, 06/25/22).

Individual Factors

Asking Questions

Twenty-four (71%) participants said they asked questions to help with their onboarding. Here are a few example comments from the onboarding logs about this factor: “Asking for advice and guidance on what to do next from veteran coworkers/teammates” (Bittersweet, 04/19/22). “I have some people I’m sensing are good allies so I’ve set up meetings with them this week to get their reaction to things” (Apricot, 03/27/22). “I don't like to play the ‘new guy’ card, but I've had to in order to get

things explained to me outside of the organizational jargon” (Maroon, 05/25/22). “I also need to be willing to ask questions and ask for feedback, and even more important, be open to whatever the answers might be, even if I don't agree with them or if I don't like them” (Mahogany, 03/26/22). The last two comments reflect a certain level of reluctance or discomfort with asking questions shared by several participants, even though it is the top self-helping action.

Feeling Confident

Twenty (59%) participants identified feeling confident as a helping factor. While feeling confident is an individual factor, it is influenced by the organization. Newcomers feel confident, accepted, and valued when they are respected and encouraged. Here are a few example comments from the onboarding logs about this factor: “I feel like I'm generally part of the team, and not such an outsider” (Timberwolf, 04/01/22). “I have felt more confident in making suggestions and contributing in group discussion” (Robin's Egg, 04/29/22). Mauvelous said:

What has driven it is really positive onboarding, they've cultivated my confidence. It can be really daunting to get in front of a team and lead them, deliver results for the year, but they have done a nice job of making sure I'm set up to succeed (5/27/2022)

Prioritizing My Needs

Eighteen (53%) participants reported deciding to be more proactive in their onboarding and identifying what they need to do. Here are a few example comments from the onboarding logs about this factor: Wisteria said:

I took control of my onboarding. Instead of waiting for trainings, I asked my direct report for time. I know he is already overworked (he has his role, covering for paternity leave, and still owning most of my tasks), however key tools and reports and being able to ask my questions has helped with my onboarding (04/07/22)

Tumbleweed described the actions she took on her own to find information and create her own checklist:

I went through just about anything I could find on the department SharePoint site, and I finally started recording what I was going through that I thought was most interesting/valuable so I could potentially help create an onboarding checklist for those coming after me and identified some documents that seem most outdated that I could maybe help update (04/18/22)

Positive Attitude

Eleven (32%) participants said having a positive attitude while facing challenges and not becoming discouraged was helpful. Here are a few example comments from the onboarding logs about this factor: “I need to remember that and not get discouraged when I don't know a process fully” (Chestnut 03/04/22). “There are lots of intricacies to remember which is difficult, but I enjoy the challenge” (Skyblue, 05/07/22).

I won't know until I try, so I'm eager to try! I think any stress I am feeling (not much, but it is there now and then) will subside once I know that I can perform well on the tasks I was hired to do (Plum, 05/06/22)

Observing Others

Ten (29%) participants reported observing others to gather information, learn, and adjust their own behaviors. They observe to learn how things are done and also who to seek out or avoid. Here are a few example comments from the onboarding logs about this factor: “I handled it—got everything done that needed to be done—but I've learned not to offer to help her unless I (a) really need to, or (b) have a lot of spare time” (Mahogany, 04/08/22). “I have been reserved and seeking first to understand current processes. There must be a method to the madness. I am testing my assumptions to get the back story on how decisions were made” (Robin’s Egg, 04/29/22). Periwinkle said:

I've relied on a couple of people who I thought understood things at a micro level and it turns out they did not. This helped me in two ways. First, it helped me accept that it's okay to not know everything yet, and second, it made it blatantly clear how important it is for me to ask more questions and seek support from multiple sources (06/03/22)

Weekly Logging

Eight (24%) participants reported that participating in this study and completing a weekly log was helpful to them. Here are a few example comments from the onboarding logs about this factor: “Value the logging as part of adjustment” (Tumbleweed, 05/05/22). “This is my last entry and I want to thank you for the opportunity to participate. The process actually gave me clarity and allowed me to appreciate my role and my leadership team” (Magenta, 06/19/22). “This has been a great space to vent some of my frustrations as well as ideas for improvement in onboarding” (Razzle Dazzle Rose, 06/09/22).

Previous Experience

Seven (21%) participants reported drawing on their previous experience. Here is an example comment from the onboarding log about this factor. Turquoise said:

Having domain knowledge in my field and having previous work experience has helped me deal with issues and helped me not feel completely clueless. This has also helped me deal with situations better (07/10/22)

Taking Notes

Six (18%) participants reported taking notes and creating cheat-sheets for themselves. Here are a few example comments from the onboarding logs about this factor: “I’m creating cheat-sheet type resources to help me (and the next new hire we expect in a month or two)” (Periwinkle, 05/20/22). “One tactic I plan to implement is creating cheat sheets as far as strategy and tactics” (Wisteria, 04/24/22).

Helping Others

Three (9%) participants mentioned helping or planning to help future new hires was helpful to them. Here is an example comment for this factor: “Having other new people come in with me has been helpful. But also those who came in AFTER me. We had a manager start a week or 2 after me and I was able to give him some advice” (Timberwolf, 04/18/22).

Hindering Factors

Hindering factors are the incidents from the participant onboarding logs and check-in interviews that describe actions, experiences, or conditions that occurred and hindered their onboarding. These often came in response to this prompt: “Thinking about the past week, what made it difficult for you to adjust? Please say as much as you can to describe what happened, what it meant to you, how it hindered, what led to it, what

happened next.” In total, 386 hindering incidents were collected and categorized. For clarity, I have divided the hindering factors into two groups: organizational factors and individual factors. Within the hindering factors, 67% were organizational and 36% were individual.

Organizational hindering incidents are ineffective practices, conditions, and policies, or behaviors by workplace agents (i.e., managers, coworkers, human resources professionals). Although not a separate prompt in the log, individual hindering incidents are generally newcomer attitudes, emotions, beliefs, or challenges identified as personal, often signaled by the use of “I” and a verb in the active voice. Table 4.3 shows the cases and incidents for the hindering factors category. There were 386 total hindering incidents and 34 cases or participants. The organizational hindering factors are presented first. Within the organizational hindering factors, the factors are presented from most to least based on the participation rate or percent of cases reporting the factor. In a situation where two or more factors have the same participation rate, the number of incidents is then used to determine which should be listed first. For example, three organizational hindering factors have the same participation rate: *Awkward Interactions*, *Isolated*, and *Barriers* have a 44% participation rate, or 15 out of 34 participants reported those factors. So they are listed in decreasing order of the number of incidents—43, 33, and 28 respectively. The individual hindering factors are presented second. As with the organizational hindering factors, they are listed in decreasing order by participation rate and then number of incidents. In using the organizational and individual groupings, an individual hindering factor with a higher participation rate than some organizational hindering factors may be listed lower in the table—for example, *Anxiety*, with a 53%

participation rate, which is the third highest overall. One organizational factor and one individual factor are just under the 25% viability threshold, both at 24%.

Table 4.3

Frequencies for Hindering Factors

Hindering Factors	Cases		Incidents	
	<i>n</i>	%	<i>n</i>	%
386 Incidents				
Organizational	34	100	293	76
1. Information Overload	27	79	60	16
2. Unclear Expectations	23	68	6	15
3. Awkward Interactions	15	44	43	11
4. Isolated	15	44	33	9
5. Barriers	15	44	28	7
6. Resources Delayed	13	38	36	9
7. Communication Challenges	9	26	17	4
8. <i>Organizational Volatility</i>	8	24	27	7
Individual	26	76	93	24
1. Anxiety	18	53	33	9
2. Work-Life Balance Concerns	12	35	17	4
3. External Events	10	29	19	5
4. <i>Boredom</i>	8	24	24	6

Note. Factors in italics are below the 25% viability threshold.

Organizational Factors

Information Overload

Twenty seven (79%) participants mentioned referred to drinking from a firehose and being overwhelmed with too much information. Here are a few example comments from the onboarding logs about this factor: “Too many new hire tasks, deadline of tasks” (Orchid, 05/07/22). “Most challenging part is all the content there is to learn about the company products. At times I did know what to watch/read about first” (Goldenrod, 03/15/22). “There's already so many emails and Teams chats in just a month, it's an information overload” (Neon, 06/29/22). “Also, there seems like so much to do, so experiencing a bit of overwhelm” (Asparagus, 05/02/22). “Haven't had time to focus on HR materials, trainings, or give myself time to absorb the vast data” (Wisteria, 03/25/22).

Unclear Expectations

Twenty-three (68%) participants mentioned unclear expectations, which includes not being provided context or preparation for meetings or assignments, no onboarding or training, ineffective training, or being sent to irrelevant meetings outside of the participant’s duties. Here are a few example comments from the onboarding logs about this factor: “Being thrown into the fire meant that I was making decisions on the fly” (Asparagus, 05/12/22). “Right now, I don't feel like I have a clear roadmap of what they'd like me to be doing, and I'm sort of hitting the ‘other duties as assigned’ part of my job description” (Maroon, 05/09/22). Jazzberry said:

Something i have been confused about is process at this point, and it's tough because teammates assume i already know what is going on, and there is no explicit introduction document/communication for anything (06/26/22)

Awkward Interactions

Fifteen (44%) participants mentioned awkward or problematic interactions with coworkers who were too busy to answer questions, uncooperative, performing poorly, gossiping, or rude. Here are a few example comments from the onboarding logs about this factor: “I’ve had a few misunderstandings of who does what at the start of some of my meet-and-greets and it distracts from the meeting intent” (Periwinkle, 05/20/22). “Junior staffer and I have different expectations of how our roles will be once I’m onboarded” (Wisteria, 04/17/22). “There’s also one employee who’s constantly watching what I’m doing, commenting on it, and telling me how to do things even though I’m following the instructions I’ve been giving in training” (Mahogany, 03/26/22). Peach said:

I was trying to be a democratic leader before and it was starting to derail the project. I also have a teammate who is not as experienced as I am and sometimes spends too long iterating on the same deliverables when we are working on a tight deadline (05/09/22)

Magenta described a direct report he had to have a performance conversation with:

I have a teammate that I’m going to have to do some coaching with him. Knowledgeable and not the easiest person to get along with. Can’t have a situation where people avoid contacting you because you’re difficult. Had to have a conversation and he was just unusually difficult (06/09/22)

Isolated

Fifteen (44%) participants mentioned inability to interact with their coworkers. Working remotely is part of being isolated, but it is more than that. Participants used the

phrase “on my own” to characterize their experience of having no one available to guide them. Here are a few example comments from the onboarding logs about this factor: “I would say while working remotely is great, starting a new job remotely can be a little difficult since you don’t have someone at the ready to answer questions” (Copper, 04/26/22). “Some key leadership representatives, including my manager, have been out the majority of my first week, so I'm navigating on my own” (Tumbleweed, 04/12/22). “However, everybody is already set in their hybrid schedule, so my plan of being around everyday has little value if others are not around” (Wisteria, 04/07/22).

Barriers

Fifteen (44%) participants mentioned barriers, which includes barriers to getting training, information, or access to documentation or systems. Here are a few example comments from the onboarding logs about this factor: “Still a bit tricky getting all the info on; viewing pay, benefits, That information could be conveyed better” (Timberwolf, 04/11/22). “I need to be pallet jack certified, but the guy who does the training/testing has been crazy busy. This should have been completed last week, but he never responded to the training request” (Mahogany, 04/17/22).

Peach said:

I keep running into different roadblocks in terms of process. My client’s organization has a mandatory product review that adds 3 weeks into our timeline but we don’t have the ability to push the ship date so we need to take three weeks off development (04/22/22)

Resources Delayed

Thirteen (38%) participants mentioned a delay in receiving resources. Here are a few example comments from the onboarding logs about this factor: “Onboarding delayed by a week” (Orchid, 04/28/22). “knowing there is a delay in getting things such as the company car and company card delivered to my home so I am able to use these items for business purposes, such as purchasing flights for training” (04/19/22). “Not having the company computer. I am not able to access all of the files, so I can only imagine some of the things that are being discussed in meetings” (Razzle Dazzle Rose, 06/02/22). “i struggled/ was frustrated with lack of proper communication on their HR/onboarding side. i was not told anything about pay schedule, benefits enrollment etc. it was a hassle and i had to contact service desk many times” (Jazzberry, 05/20/22).

Communication Challenges

Nine (26%) participants identified communication challenges as hindering. Here are a few example comments from the onboarding logs: “Language is still an issue. I often received letters with German only, which I am not able to understand. In this case, I had to ask the HR in my lab for help” (Granny Smith Apple, 04/01/22). “Everyone being remote so not be able to get questions answered as quickly as if in the office” (Copper, 05/20/22).

Organizational Volatility

Eight (24%) participants mentioned organizational volatility as hindering. The volatility is due to ongoing change, turnover, or other problems. Here are a few example comments from the onboarding logs about this factor: “during Covid, the employees got pretty lax when it comes to following store standards and rules” (Mahogany, 04/17/22).

Chestnut said:

The manufacturing plant is working through many changes, working on improvements, dealing with employee shortages, and looking for proper systems to put in place to help streamline everything. Learning a new job, new product, and trying to manage through the chaos can be difficult and frustrating (03/25/22)

Olive described the loss of a mentor and other turnover:

Several big hits this week. [Person], our branch VP, suddenly left her job and the company. She was my mentor and friend, and one of my biggest proponents. This leaves the Durham office in the hands of the Senior Engineering Directors, which is very concerning. Also found out that most of the QE department, along with about 40 others at my prior position at the [Company] were laid off this week. Including the Director, my manager, and 4 of the quality engineers (05/27/22)

Razzle Dazzle Rose described high turnover at her organization:

This place that I am working at has a high turnover rate, I am starting to see why. They give more and more job duties without any indication of a pay rise, not to mention I still haven't been paid since I started this job (07/19/22)

Individual Factors

Anxiety

Eighteen (53%) participants mentioned feeling anxious. Here are a few example comments from the onboarding logs about this factor: “My anxiety. I feel nervous about taking new job. What if I don’t understand the work. This did not help me adjust easily” (Denim, 05/08/22). “Seems like every other day I just want to throw in the towel and walk away from this job. My emotions are not at all settled” (Spring, 05/14/22). Plum said:

Feeling anxious about potentially meeting my whole team in-person for the first time this summer. Feels like a lot of pressure to fly to another city to meet people who I have only interacted with briefly in a virtual setting (05/27/22)

Work-Life Balance Concerns

Twelve (35%) participants mentioned work-life balance concerns. This factor is influenced by working from home or with coworkers in different time zones. While work-life balance is an organizational helping factor, enabled by organizational policies and culture, here participants took personal responsibility for it hindering them.

Following are a few example comments from the onboarding logs about this factor:

“More working hours each day and week, more diversified global team. Yes negative impact on work life balance” (Apricot, 04/05/22). “My wife was travelling so it was just me and our toddler son. Juggling working from home and getting him set for daycare made the mornings a bit strained. I felt behind before I even started the day” (Silver, 05/23/22). Chestnut said:

The hardest adjustment has been on the home front. I was working part time before and now am full time. Not being home to greet kids after school or help with homework etc has been hard as Mom but my family has been very supportive (02/23/22)

External Events

Ten (29%) participants identified this factor, which primarily includes problems or bad news beyond their control. Here are a few example comments from the onboarding logs about this factor: “My boss and I were both sick, but other than that, there were no work-related factors” (Mauvelous, 05/13/22). Apricot said:

Being on a global team, the Ukraine war is having a toll on the mental health of team members, especially those in Poland. That is adding a layer of complexity to my onboarding that makes it even trickier as I rely on those team members to learn and get up to speed (03/27/22)

Mahogany described how a friend's serious car accident affected her:

One of my friends was driving home from work at [company] and was hit by a drunk driver. Her car was totaled (saw pics, can't believe she survived), and all I knew on Sunday was that she was in surgery (05/03/22)

Boredom

Eight (24%) participants said they were bored and unsure what to do because they had few or no work tasks. Here are a few example comments from the onboarding logs about this factor: "I would say that the only difficulty is just the boredom of waiting for calls. The team doesn't want to overload me right away. Which is nice. But it's also boring" (Lemon, 05/22/22). Jazzberry reported:

Feeling bored/overwhelmed/demotivated: every time i got stuck or had an unanswered question, i would get demotivated and found it difficult to get back to work. i would have loved to have other tasks to switch to, but because i didnt have a lot going on, i would just get bored and not have enough energy to get back to the one task (06/13/22)

Plum noted that she was bored and wondering what she was supposed to be doing:

As with previous weeks, there were times during the week where I didn't feel like I had much work to do, and I wasn't sure how to spend my time. This sense of

boredom makes me wonder if I'm doing the right thing, whether what I'm experiencing is normal, etc. (06/17/22)

Hope Items

Hopes are experiences or conditions that did not occur, but participants expressed a desire hope or wish for them to occur, using words such as wish, want, hope, would, should, prefer, suggest, recommend, or by entering their comments in response to the prompt: “Reflecting on your experiences this week, what would you hope for to help with your adjustment.” I used “hope” instead of the traditional “wish” in the ECIT protocol because the participants were in the middle of a process in which they had some agency. In total, 244 hope items were collected and categorized. For clarity, I have divided the hope items into two sets: organizational and individual. Within the hope items, 58% were organizational and 42% were individual.

Organizational hopes are desired resources or actions to be provided or taken by workplace agents (i.e., managers, coworkers, human resources professionals). Individual hopes are actions the newcomer intends to take on their own behalf, often signaled by the use of “I” and a verb in the active voice. Table 4.4 shows the cases and incidents for hopes. Ninety-seven percent of participants reported organizational hopes. Eighty-two percent of participants reported individual hopes. The organizational hope items are presented first. Within the organizational hope set, items are presented from most to least based on the participation rate or percent of cases reporting the factor. The individual hope items are presented second. As with the organizational hope items, they are listed in decreasing order by participation rate and then by number of incidents. In using the

organizational and individual sets, an individual hope items with a higher participation rate than some organizational hope items may be listed lower in the table—for example, *Make Allies*, with a 47% participation rate, which is the fourth highest overall. All hope items had a participation rate above the 25% viability threshold.

Table 4.4

Frequencies for Hope Items

Hope Items	Cases		Incidents	
	<i>n</i>	%	<i>n</i>	%
244 Incidents				
Organizational	33	97	142	58
1. More Guidance	25	74	64	26
2. Training or Documentation	18	53	36	15
3. More Interaction	16	47	23	9
4. Receive Resources	10	29	20	8
Individual	28	82	103	42
1. Make Allies	16	47	34	14
2. Time Management	15	44	26	11
3. Perform Successfully	14	41	28	11
4. Be Proactive	10	29	15	6

Organizational Items

More Guidance

Twenty-five (74%) participants said they hoped for more guidance, feedback, and support, especially from their manager but also from their coworkers. Here are a few example comments from the onboarding logs about this factor: “A little more support and less self-direction” (Seagreen, 04/11/22). “Wish supervisor was around more, wish agency partner was available more” (Wisteria, 04/07/22). “Meetings with the client, my manager, and new hire mentor to help guide me on what expectations are for the project and my role” (Olive, 04/22/22). Robin’s Egg said:

I was given the org chart and instructed to set up one-on-one meetings with everyone on the team to get to know them. I appreciate being given the opportunity to schedule this myself but would have liked some guidance about people's schedules that I would otherwise have no knowledge of in this context and culture (04/21/22)

Training or Documentation

Eighteen (53%) participants identified this hope. Training is defined time set aside for the participant to learn something related their work responsibilities. Documentation is access to procedures, user guides, videos, reports, and other records. Here are a few example comments from the onboarding logs about this factor: “More interactive trainings, fewer ‘high overviews’ and videos!” (Skyblue, 04/16/22). “I hope to find some documents to read through to help me process the new systems and how to navigate them” (Apricot, 04/01/22). “thinking about what didn't go well, i would have appreciated a product/team onboarding document or process” (Jazzberry, 06/28/22). “Having proper documentation would help me work independently and not depend on people which hindered my work” (Turquoise, 07/10/22).

More Interaction

Sixteen (47%) participants said they hoped for more interaction. This factor reflects how participants rely upon interactions with their coworkers to learn how to perform their job. Here are a few example comments from the onboarding logs about this factor: “More time with key vendor” (Wisteria, 04/07/22). “I would love to have more time with my supervisor” (Asparagus, 06/06/22). “I am traveling to the company's annual client conference, where I will have the opportunity to sit in on thought leadership and

focus groups on how our company services clients. I'm very excited for that!"

(Mauvelous, 04/15/22). "I hope that I continue to learn while working on projects while applying my knowledge as an account manager to manage customers and their expectations when requesting things" (Goldenrod, 04/22/22).

Receive Resources

Ten (29%) participants said they hoped to receive resources they needed for work. The resources include IT set up and equipment, project management tools, ID badges, and benefits and compensation and other administrative tasks to be efficiently processed. Here are a few example comments from the onboarding logs about this factor: "To get the items previously listed, so there is a smooth start" (Bittersweet, 04/19/22). "A better company computer. The equipment is not conducive for my work" (Razzle Dazzle Rose, 06/24/22). "A project management system. I don't know why a company this large doesn't have a standard one" (Neon, 06/14/22).

Individual Items

Make Allies

Sixteen (47%) participants hoped to make allies or make connections and build effective work relationships. Here are a few example comments from the onboarding logs about this factor: "I just hope my teammates keep talking to me and communicating about struggles" (Peach, 04/22/22). "Reaching out to other team members to help me understand my work better" (Turquoise, 06/20/22). "I need to find people who I can connect with, build trust and relationships rather quickly, and then have frank conversations with" (Apricot, 03/11/22).

Time Management

Fifteen (44%) participants hoped to manage their time better. Here are a few example comments from the onboarding logs about this factor: “I hope to carve out more dedicated time on my calendar to focus more” (Goldenrod, 04/14/22). “Consequently, I'm going to arrange my daily tasks based on their priorities” (Granny Smith Apple, 04/17/22). “I think having dedicated classes / time to focus on the side tasks would be great” (Lemon, 05/15/22).

Perform Successfully

Fourteen (41%) participants hoped for opportunities to do the work and show how they can contribute. Here are a few example comments from the onboarding logs about this factor: “Hopefully I can start to take ownership of some items very soon” (Tumbleweed, 04/18/22). “I need more ‘wins’ where I do something useful that helps either team mates or sales” (Mahogany, 04/24/22). “I hope that I'm able to start celebrating my progress and my wins as we get out of the close of the fiscal year” (Maroon, 06/21/22). “I would like to have some of the floor staff acknowledge my new role and be willing to put in the effort to try new ways to improve the process” (Chestnut, 03/27/22).

Be Proactive

Ten (29%) participants hoped to be proactive about their onboarding needs. Here are a few example comments from the onboarding logs about this factor: “At this point, I want to continue to seek guidance out myself, as that has been my most successful attempt to adjust as of late” (Maroon, 07/05/22). “Creating a cadence of dedicated time for support. If I could get everyone I need in a meeting, I could describe the project once, get feedback, plus feedback on the feedback and avoid chasing everything down”

(Periwinkle, 06/10/22). “I have to not be afraid of what my co-workers might say or think” (Mahogany, 03/26/22). “I want to position myself to be more of a listener. If I have offended anyone I hope that my listening posture will be welcomed” (Robin’s Egg, 05/16/22).

Additional Findings

Longitudinal Analysis

A diary study comprises repeated observations taken over a period of time, so the data are longitudinal. I analyzed the helping factors, hindering factors, and hopes by week to determine if there were differences. Most factors had a week in which the most incidents for that factor were reported. Some factors were relatively consistent throughout the study period. Table 4.5 shows the helping factors by week with the higher number of incidents. Table 4.6 shows the hindering factors by week with the higher number of incidents, and Table 4.7 shows the hope items by week with the highest number of incidents. Figure 4.1 shows the week with the most recorded incidents for each factor.

Table 4.5*Helping Factors by Week with Most Incidents*

Factor	Study Week	Incidents
Organizational		
Manager Support	1	21
Onboarding Plan	1	19
Effective Training	1	9
Buddy or Mentor	1	12
Being Welcomed	1	12
Given Time to Learn	1	6
Resources Provided	1	5
Introductions	2	13
Clear Expectations	2	6
Work Assigned	3	10
Productive Interactions	4	16
Individual		
Asking Questions	1	10
Previous Experience	1	4
Positive Attitude	2	7
Prioritizing Needs	4	11
Taking Notes	4	4
Feeling Confident	6	10
Observing Others	6	5

Note. 1. Work-life Balance, Weekly Logging, and Helping Others incidents were consistent across study weeks. 2. In case of two weeks with the same number of incidents, the first week is used.

Table 4.6*Hindering Factors by Week with Most Incidents*

Factor	Study Week	Incidents
Organizational		
Resources Delayed	1	14
Communication Challenges	1	7
Isolated	1	8
Information Overload	2	11
Unclear Expectations	2	10
Awkward Interactions	4	10
Barriers	4	7
Organizational Volatility	4	7
Individual		
Anxiety	1	7
Boredom	2	11
External Events	2	4
Work-life Balance Concerns	4	5

Note. In case of two weeks with the same number of incidents, the first week is used.

Table 4.7*Hopes Items by Week with Most Incidents*

Factor	Study Week	Incidents
Organizational		
More Guidance	1	13
Training or Documentation	1	10
Receive Resources	2	8
More Interaction	4	7
Individual		
Make Allies	1	7
Perform Successfully	3	8
Time Management	4	9
Be Proactive	8	5

Note. In case of two weeks with the same number of incidents, the first week is used.

Figure 4.1
Helping Factors, Hindering Factors, and Hope Items by Week

		Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Hope Items	Organizational	More Guidance Training or Documentation	Receive Resources		More Interaction				
	Individual	Make Allies		Perform Successfully	Time Management				Be Proactive
Helping Factors	Organizational	Manager Support Onboarding plan Buddy or Mentor Being Welcomed Time to Learn Resources Provided	Introductions Clear Expectations	Work Assigned	Productive Interactions				
	Individual	Asking Questions Previous Experience	Positive Attitude		Prioritizing Needs Taking Notes		Feeling Confident Observing Others		
Hindering Factors	Organizational	Resources Delayed Communication Challenges Isolated	Information Overload Unclear Expectations		Awkward Interactions Barriers Organizational Volatility				
	Individual	Anxiety	Boredom External Events		Work-Life Balance Concerns				

Demographic Differences in Factors and Items

Based on how my participants described their career stage, I created three groups: early ($n=12$), middle ($n=12$), and late ($n=10$). In looking at factors by career stage, I observed some slight differences. One-way ANOVA tests showed these differences were not statistically significant. However, I observed that late-career participants reported more individual and organizational helping incidents than early- or middle-career stage participants. Late-career participants reported fewer individual hindering incidents and more organizational hindering incidents, fewer individual hope items, and more organizational hope items.

Based on the racial or ethnic identity shared by participants, I placed them in two groups: diverse ($n=11$), if they identified as anything other than white, and white ($n=23$), if they identified as white. In looking at factors by race, I observed some slight differences. Two sample t-tests assuming unequal variances showed that these differences were not statistically significant. However diverse participants reported fewer individual helping incidents, and about the same organizational helping incidents. Diverse participants reported fewer hindering incidents, both organizational and individual. Diverse participants reported fewer organizational hope items.

Based on the gender identity shared by participants, I placed them in two groups: male ($n=10$) and female ($n=23$). One participant identified as nonbinary. In looking at factors by gender, I observed some slight differences. Two sample t-tests assuming unequal variances showed that these differences were not statistically significant. However, female participants on average wrote more in their logs and reported more incidents across all the factors compared to male participants.

Based upon asking my participants about major changes they were experiencing as a result of their new job, I placed them in two groups: remote ($n=12$), if they identified working remotely as a major change for them, and on-site ($n=22$) if they did not. In looking at factors by remote versus on-site, I observed some differences. Two sample t -tests assuming unequal variances showed that these differences were not statistically significant. However, remote participants reported more organizational hindering incidents than the on-site participants.

Final Question

For the 21 participants who completed all 8 weeks of the log, during the closing check-in, I asked the following question: “After eight weeks, do you feel fully onboarded?” Eleven (52%) responded, “No, not yet,” and 10 (48%) replied, “Yes, fully.” Based on their answers, I placed them in two groups: no ($n=11$) and yes ($n=10$). Participants who answered “no” reported more than twice as many organizational hindering incidents as those who answered “yes,” at a statistically significant level based on two-sample t -tests ($p=.01$). Participants who answered “no” also reported more individual helping factors and fewer organizational helping factors, but those differences were not statistically significant.

Here are a few of their responses to this question:

Yes, not much else to do in training I am transitioning from area to the next, role is sort of the same, I’m doing it at the behest of my sales rep counterparts. They did all they could (Bittersweet, 6/16/22).

Mauvelous said he could learn more but was up and running:

I do yeah, I do feel fully onboarded, some SME needs to still come but that's part of career progressions. But as far as getting up and getting running, I'm there (5/27/22).

Lemon said he was almost fully onboarded:

About 90–95%. there is still some kinds of edge cases that come with experience and I get those every now and then. I was just assigned my first key account yesterday, I technically was assigned one a week or two ago and it fell through, I didn't get to do anything. Actually is going through a little bit of a process with that. Logging, document a bit more focus on it a little bit of learning with that otherwise I feel confident in what I'm doing and feel very well onboarded. (7/1/22).

Jazzberry said she did not feel settled into her role:

To be honest No. I don't feel like I'm fully settled into my role yet. What I mean is there is certain responsibilities that come with my role but I feel I am not at 100%, not being fully utilized yet (7/14/22).

Mahogany said she feels she still has a lot to learn:

No not yet, I feel I made a good start. I feel like I gotten past some obstacles, manager is more proactive about my training. I still have a lot to learn in operations and tasks. I'm finding I have a lot to learn about being a manger in how to deal with people and that's something I am focusing on right now. I'm observing how manager does it to learn. He's a good person to follow (5/26/22).

Chapter Summary

This chapter reported on the results of a diary study conducted over four to eight weeks with 34 participants who were experiencing onboarding at a new job. All participants reported helping factors, hindering factors, and hope items. The helping factors, hindering factors, and hope items were grouped as organizational or individual based on the locus of agency. Subgroups of participants were analyzed and compared by career stage, race, gender, and work location. Most of the slight differences observed between these groups were not statistically significant but may indicate opportunities for further research. One statistically significant difference was that participants who said they were not fully onboarded at the end of the eight weeks reported more organizational hindering incidents.

Chapter 5

Summary, Analysis, and Implications

This chapter summarizes the helping factors, hindering factors, and hope items from the onboarding diary study and compares them to the systematic literature review and relevant theories. All participants identified helping factors, hindering factors, and hope items. Within the helping factors, hindering factors, and hope items, there were both organizational and individual subsets. Although they did not gather them into groups, Butterfield et al. (2010) identified organizational and individual factors in an ECIT study of how workers manage change and Harford (2019) identified organizational and individual factors in his ECIT study of inmates in transition housing. New factors not previously identified in the research literature are highlighted. Overall, the diary study factors are more specific, have higher participation rates and reflect the perspective of the newcomer compared to the literature factors, which tend to reflect a management or researcher perspective. The findings are synthesized to reveal overarching themes and the relationships between the factors. Implications for practice and for future research and limitations are discussed.

Summary

Helping Factors

Among the helping factors identified by study participants, all twelve organizational helping factors had greater than a 25% participation rate, indicating they are viable (Butterfield et al., 2009). All (100%) participants identified organizational helping factors, representing collective agency (Bandura, 2001; Yoon, 2019). Thirty-one (91%) participants identified individual helping factors, indicating that individual human agency (Bandura, 1982; Bandura, 1989; Yoon, 2019) is important in successful onboarding. In order of participation rate, the organizational factors include: *Productive Interactions, Work Assigned, Manager Support, Introductions, Onboarding Plan, Effective Training, Being Welcomed, Buddy Or Mentor, Clear Expectations, Given Time To Learn, Work-Life Balance, and Resources Provided*. Among the individual helping factors, five of the nine met the 25% threshold and one had 24%. In order of participation rate, those factors include: *Asking Questions, Feeling Confident, Prioritizing Needs, Positive Attitude, Observing Others, and Weekly Logging*. These helping factors align with and extend the helping factors identified from the literature, demonstrate viability as factors, and enrich our understanding of what helps newcomers from their perspective.

The diary study factors, *Onboarding Plan, Effective Training, and Buddy or Mentor* align with the literature factor, *Institutional Socialization Tactics*, but are more specific and have higher participation rates. The diary study factor *Given Time To Learn* aligns with the literature factor *Respect Individual Differences*, and is a more specific example with a higher participation rate. The diary study factors *Productive Interactions*

and *Introductions* align with the literature factor, *Facilitate Social Relationships*, are more specific and have higher participation rates. *Productive Interactions* is the top organizational helping factor from the diary study versus *Institutional Socialization Tactics* which is the top organizational helping factor from the literature. Diary study factors *Manager Support*, *Being Welcomed*, and *Resources Provided* align with literature factor *Prepare Coworkers And Supervisors*; they are the outcomes of preparing coworkers and supervisors, are more specific, and have higher participation rates. Diary study factors *Clear Expectations* and *Work-Life Balance* align with literature factor *Realistic Recruiting And Selection*; they are more specific and have higher participation rates. Diary study factor *Work Assigned* aligns with literature factor *Opportunity to Perform*, and has a significantly higher participation rate. Diary study factors *Prioritizing Needs*, *Weekly Logging*, *Taking Notes*, and *Helping Others* align with literature factor *Proactivity*, are more specific, and have higher participation rates (except for *Helping Others*). Diary study factors *Feeling Confident*, *Positive Attitude*, and *Previous Experience* do not align with factors from the literature and represent new findings. These factors are types of psychological human capital (Bauer & Erdogan, 2014; Holton & Yamkovenko, 2008; Luthans & Youssef, 2004). Table 5.1 shows the alignment of helping factors from the systematic literature review and the diary study.

Table 5.1*Helping Factors Alignment*

Systematic Literature Review		Diary Study	
Factors	Participation %	Factors	Participation %
Institutional Socialization Tactics	32	Onboarding Plan	59
		Effective Training	50
		Buddy or Mentor	50
Respect Individual Differences	28	Given Time to Learn	35
Facilitate Social Relationships	27	Productive Interactions	85
Prepare Coworkers and Supervisors	27	Introductions	68
		Manager Support	71
		Being Welcomed	44
Realistic Recruitment and Selection	22	Resources Provided	29
		Clear Expectations	44
		Work-life Balance	35
Opportunity to Perform	10	Work Assigned	76
Seeking Information and Feedback	19	Asking Questions	71
		Observing Others	29
Proactivity	10	Prioritizing Needs	53
		Weekly Logging	24
		<i>Taking Notes</i>	18
		<i>Helping Others</i>	9
New Factors (Psychological Human Capital)		Feeling Confident	59
		Positive Attitude	32
		<i>Previous Experience</i>	21

Note. Factors in italics are under the 25% participation rate.

These results also indicate that while *Institutional Socialization Tactics* are helpful when offered, *Productive Interactions* with coworkers are more instrumental for newcomers during the initial weeks at a new job. Organizational helping factors pay a triple dividend: they support successful onboarding directly; support it indirectly by

promoting additional organizational helping factors; and inspire hopes and individual helping factors. Newcomers help themselves through their proactivity, primarily by asking questions (Ahuja & Galvin, 2003; Beenen et al., 2016; De Vos & Freese, 2011; Zheng et al., 2016), which depends upon the *Introductions* and *Productive Interactions* with coworkers, and by drawing upon their psychological human capital.

Hindering Factors

Among the eight organizational hindering factors identified by study participants, seven had a greater than a 25% participation rate and one had a 24% participation rate, higher than the participation rates for any of the hindering factors from the literature review, which would not be considered viable according to ECIT credibility check, a participation rate of at least 25% (Butterfield et al., 2009). In order of participation rate, those factors include: *Information Overload*, *Unclear Expectations*, *Awkward Interactions*, *Isolation*, *Barriers*, *Resources Delayed*, *Communication Challenges*, and *Organizational Volatility*. Among the four individual hindering factors, three had a greater than a 25% participation rate and one had a 24% participation rate. In order of participation rate, those factors include: *Anxiety*, *Work-Life Balance Concerns*, *External Events*, and *Boredom*. All (100%) participants reported organizational hindering factors and 26 (76%) reported individual hindering factors, indicating that these factors were widely experienced. These hindering factors align with and extend the hindering factors identified from the literature, demonstrate viability as factors, and enrich our understanding of what hinders newcomers from their perspective.

Diary study factors *Information Overload*, *Unclear Expectations*, *Isolated Barriers*, and *Resources Delayed* align with literature factor *Deficient Onboarding*, are more specific, are results of deficient onboarding, and have higher participation rates. Diary study factors *Awkward Interactions* and *Communication Challenges* align with literature factor *Apathy Toward Newcomers*, are more specific, and have higher participation rates. Diary study factor, *Boredom* aligns with literature factor *Unmet Expectations*. Diary study factor *Awkward Interactions*, aligns with literature factor, *Undermining*. Diary study factors *Anxiety*, *Work-Life Balance Concerns*, *External Events*, and *Organizational Volatility* do not align with factors from the literature and represent new findings.

Of those new factors, *Organizational Volatility* is organizational; the remaining new factors are individual. *Anxiety* is a result of the hindering factors newcomers are experiencing (Cepale et al., 2021; Saks & Ashforth, 2000; Slebarska et al., 2019). *Work-Life Balance Concerns*, *External Events*, and *Organizational Volatility* represent circumstances beyond the newcomer's control. *Work-Life Balance Concerns* and *External Events* are outside the workplace, but still affect the newcomer's onboarding process. *Organizational Volatility* is within the workplace, reflecting how the organizational culture and climate shape the employer's approach to onboarding (Filstad & McManus, 2011; Rollag, 2004; Wang & Kim, 2013). Table 5.2 shows the comparison of hindering factors from the systematic literature review and the diary study.

Table 5.2*Hindering Factors Alignment*

Systematic Literature Review		Diary Study	
Factors	Participation %	Factors	Participation %
<i>Deficient Onboarding</i>	10	Information Overload	79
		Unclear Expectations	68
		Isolated	44
		Barriers	44
		Resources Delayed	38
<i>Apathy Toward Newcomers</i>	9	Awkward Interactions	44
		Communication Challenges	26
<i>Unmet Expectations</i>	8	<i>Boredom</i>	24
<i>Undermining</i>	9	Awkward Interactions	44
New Factors		Anxiety	53
		Work-Life Balance Concerns	35
		External Events	29
		<i>Organizational Volatility</i>	24

Note. Factors in italics are under the 25% participation rate.

These results also indicate that deficient onboarding takes many forms, but *Information Overload*, or pushing too much information too soon and rushing the newcomer (Fyock, 2009; Holton, 2001; Ncube, 2008), is the most instrumental hindering factor. Social cognitive theory proposes that learning takes place through interactions with others (Bandura, 1971; Brown, et al., 1989; Korte, 2012) repeated over time (Rasdi, et al., 2009; Zimmerman, 2013). The hindering factor *Awkward Interactions* works against this. For the study participants who said they were not fully onboarded after 8 weeks, experiencing more organizational hindering factors was a statistically significant difference from those who said they were fully onboarded in that time frame. When

participants used individual helping factors in response to organizational hindering factors, it was to remediate, or try to make up for what they described as “wasted time.”

These results also show that in addition to the hindering factors created by the organization, newcomers also face personal challenges during the onboarding process—a reminder that newcomers are individuals with their own lives, needs, and personalities, as captured by the organizational helping factor from the literature *Respect Individual Differences*.

Hope Items

All four organizational hope items and all four individual hope items identified by study participants had a participation rate higher than 25%—higher than the participation rates for any of the hope items from the literature review, which would not be considered viable according to ECIT credibility check (a participation rate of at least 25%) (Butterfield et al., 2009). All (100%) participants identified either organizational or individual hope items; 33 (97%) identified organizational hopes; and 28 (82%) identified individual hopes. The results indicate that hope is an important career-development mechanism, as proposed by hope-action theory (Niles, et al., 2010; Yoon, et al., 2021) that catalyzes the individual human agency (Bandura, 1982; Bandura, 1989; Yoon, 2019) important in successful onboarding.

In order of participation rate, the organizational hope items include: *More Guidance, Training or Documentation, More Interaction, and Receive Resources*. In order of participation rate, the individual hope items include: *Make Allies, Time Management, Perform Successfully, and Be Proactive*. These hope items align with and extend the hope items identified from the literature, demonstrate viability as factors, and

enrich our understanding of what newcomers hope for from their perspective. I used “hope” instead of the traditional “wish list” in the ECIT method because I theorized that my study participants were contemporaneously engaged in a process in which they had some individual agency. The emergence of individual hopes supports that idea.

Diary study item *Perform Successfully* aligns with literature item *Expertise Recognized and Valued*, is more agentic, and has a higher participation rate. Diary study items *More Guidance, Training Or Documentation, More Interaction, and Receive Resources* align with literature item *Onboarding Plan*, are more specific, and have higher participation rates. Diary study items *Make Allies, Time Management, and Be Proactive* do not align with literature items and represent new findings. These new hope items reflect individual agency and a desire to develop social capital (Bauer & Erdogan, 2014; Korte, 2012). Table 5.3 shows the comparison of hope items from the systematic literature review and the diary study.

Table 5.3

Hope Items Alignment

Systematic Literature Review		Onboarding Study	
Factors	Participation %	Factors	Participation %
Expertise Recognized and Valued	2	Perform Successfully	41
Onboarding Plan	2	More Guidance	74
		Training or Documentation	53
		More Interaction	47
		Receive Resources	29
New Factors (Individual Agency, Develop Social Capital)		Make Allies	47
		Time Management	44
		Be Proactive	29

Diary study hopes are more specific and action-oriented than the hopes from the literature review. Beyond hoping for their *Expertise To Be Recognized And Valued*, newcomers hope *To Perform Successfully*. Although participants do hope for an *Onboarding Plan*, the more instrumental hope is for *More Guidance*, through interactions with their manager and coworkers. The top individual hope from the diary study, *Make Allies*, directly relates to the top organizational helping factor, *Productive Interactions*. Hope is necessary for newcomers to cope with hindering factors.

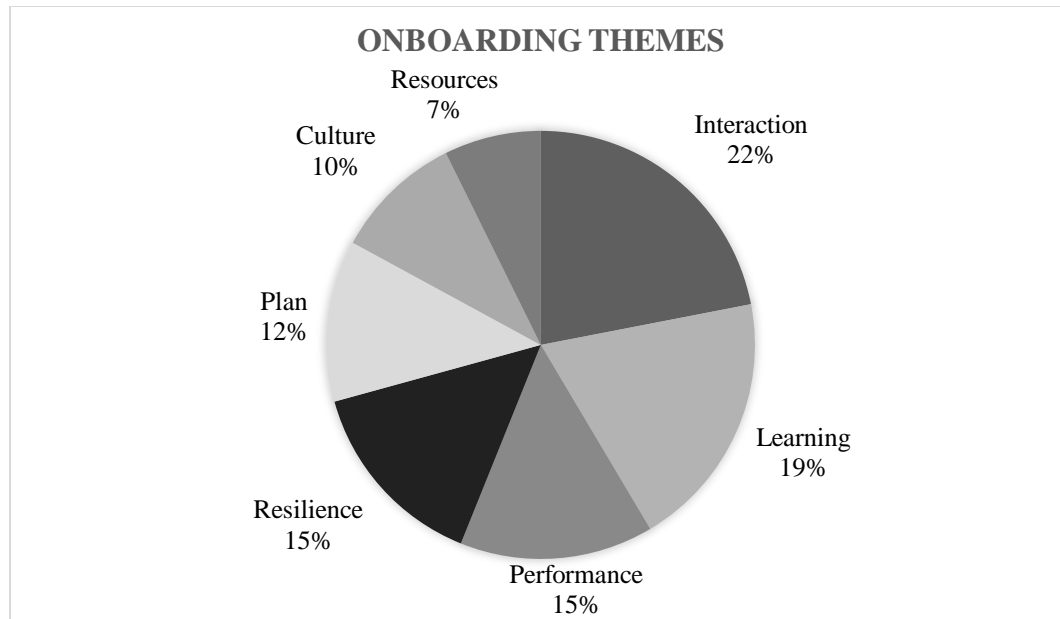
Themes Across Factors and Items

As I analyzed the helping factors, hindering factors, and hope items, it seemed to me that there were relationships between the factors and that the factors could be organized in useful ways to provide a holistic onboarding model grounded in newcomers' experiences for HRD professionals who want to assess their organizations' onboarding processes or for future research on the topic. Inspired by open systems and organization development models like Weisbord's six boxes (Weisbord, 1976), McKinsey's 7S (Nejad, et al., 2015; Peters, 2011), I looked at the factors and items for relationships and found themes that encompassed multiple factors and items. The themes are *Interaction*, *Learning*, *Performance*, *Resilience*, *Plan*, *Culture*, and *Resources*. With the exceptions of resilience and resources, these themes have appeared in the literature. Within the themes, relationships between the factors and items can be seen. The helping factors mitigate the hindering factors. Hindering factors elicit hopes. Hopes reinforce the helping factors,

catalyze the newcomer's individual helping actions, and indicate potential new helping factors. Figure 5.1 shows the seven themes arranged by the number of factors and items.

Figure 5.1

Themes by Number of Factors and Items



The first theme is *Interaction* (Allen & Shanock, 2013; Bakker et al., 2022; Beenen & Pichler, 2014; Chu & Chu, 2011), which comprises nine factors and items. Organizational helping factors *Productive Interactions*, *Manager Support*, *Introductions*, and *Buddy Or Mentor* all facilitate the newcomer interacting with others at their new workplace. Individual helping factor *Asking Questions* is an important newcomer strategy. Organizational hindering factors *Awkward Interactions* and *Isolated work* against the helping factors. Organizational hope item *More Interaction* indicates the newcomer desires more interaction, including with different coworkers if their interactions so far have been awkward. Individual hope item *Make Allies* is a goal for the newcomer's interaction.

The second theme is *Learning* (Filstead & McManus, 2011; Ishii et al., 2011; Korte, 2009; Traeger et al., 2021), which comprises eight factors and items. Organizational helping factors *Effective Training* and *Given Time To Learn* support individual helping factors *Observing Others*, *Previous Experience*, *Weekly Logging*, and *Taking Notes*. Organizational hindering factor *Information Overload* impedes learning. Newcomers hope that the organization will provide more *Training or Documentation* to help them learn.

The third theme is *Performance* (Bamberger et al., 2017; Beyer & Hannah, 2002; Ivanova & Klimova, 2021; Korte et al., 2019; Molleman & Van der Vegt, 2007; Raghuram, 2011), which comprises six factors and items. Organizational helping factor *Work Assigned* facilitates newcomer performance. Organizational hindering factor *Unclear Expectations* thwarts performance and leads to individual hindering factor *Boredom* from not being assigned the anticipated and desired work. Individuals hope to *Perform Successfully*, and when they do, individual helping factors *Feeling Confident* and *Helping Others* are outcomes.

The fourth theme is *Resilience*, comprising six factors and items, all of which are individual. Newcomers help themselves by having a *Positive Attitude* and *Prioritizing Their Needs*. They are hindered by *Anxiety*, *External Events*, and *Work-Life Balance Concerns*, which they must cope with. They hope to *Be Proactive*.

The fifth theme is a *Plan* for onboarding (Allen & Shanock, 2013; Chow, 2002; Eberl et al., 2012; Filstad & McManus, 2011; Garner et al., 2021; Kim et al., 2005; Klein & Weaver, 2000; Nasr et al., 2019; Peltokorpi et al., 2022; Slattery et al., 2006; Spagnoli, 2020), comprising five factors and items. Organizational helping factors in this theme are

Onboarding Plan and *Clear Expectations*, which mitigate the organizational hindering factor *Barriers*. Newcomers hope for *More Guidance* from the organization and to be better at their own *Time Management*.

The sixth theme is *Culture* (Filstad & McManus, 2011; Rollag, 2004; Wang & Kim, 2013), comprising four factors, all of which are organizational. Organizations help newcomers by *Welcoming* them and providing *Work-Life Balance*. Organizations hinder newcomers by their *Volatility* and *Communication Challenges*.

The seventh theme is *Resources*, comprising three factors and items, all of which are organizational. Organizations help by *Providing Resources* and hinder by *Delaying Resources*. When resources are delayed, newcomers hope to *Receive Resources* from their organization.

The seven onboarding themes may also bring to mind Maslow's hierarchy of needs (Maslow, 1943), which identified five needs that motivate humans: physiological, safety, love, esteem, and self-actualization. Maslow (1943) posited that the more basic needs must be at least partly satisfied before higher-level needs can be pursued; however, the needs are not independent—they are related to each other. Maslow's hierarchy has been criticized for weak empirical evidence, poorly defined needs, a Western and individualistic focus (Bridgman et al., 2019; Fallatah & Syed, 2018, chapter 2), and being appropriated from the Blackfoot Indian Tribe (Feighenbaum & Smith, 2020; Michel, 2014); however, it remains a popular theory for explaining employee motivations (Bridgman et al., 2019; Fatallah & Syed, 2018, chapter 2). It is easy to see that *Resources* aligns with physiological needs and *Learning* and *Performance* align with self-actualization. A more meaningful comparison regarding the onboarding themes is

that, like Maslow's needs, the more basic ones—*Resources, Culture, Plan, Resilience, Interactions*—must be at least partly addressed before others (*Learning, Performance*) can take place, and they are related to one another.

Implications

Implications for HRD Practice

HRD professionals who want to ensure their organizations provide effective onboarding should conduct an assessment of their current practices, investigating which helping factors are being implemented, which hindering factors are occurring, and what their new hires hope for. They could also use the seven themes as a framework to investigate driving and restraining forces (Adelman, 1993; Swanson & Creed, 2014) for their onboarding program. It would also be helpful to define what “fully onboarded” means for their organization. HRD professionals can conduct evaluations of the onboarding process with new hires and use the feedback to make recommendations and improve their process. An effective onboarding process may also be leveraged as a recruitment tool and could be a differentiating factor in attracting the most desirable candidates. The most effective onboarding approach will differ by the organization (Filstad & McManus, 2011; Rollag, 2004; Wang & Kim, 2013) and the individual (Beus et al., 2014; Beyer & Hannah, 2002; Carr et al., 2006; Chan & Schmitt, 2000; Chreim & Tafaghod, 2012; Gardner et al., 2021; Harris et al., 2017; Peltokorpi et al., 2022; Robinson & Morrison, 2000), but this study reveals some probable common elements. To help, an onboarding plan is important, but productive interactions with coworkers are more important, so they need to be prepared for their role since the newcomer will be

asking them questions. HRD professionals can provide training and resources to prepare the coworkers, a helping factor identified in the literature (Bamberger et al., 2017; Harris et al., 2020; Kammeyer-Meuller & Wanberg, 2003; Kammeyer-Meuller et al., 2013; Korte, 2009; Korte et al., 2015; Nasr et al., 2019; Ou et al., 2018; Smith et al., 2013). A buddy or mentor, one way to operationalize the serial tactic (Van Maanen & Schein, 1979), is an important helping factor from the literature (Allen, 2006; Cable & Parsons, 2001; Chi & Wang, 2018; Chow, 2002; Delobbe et al., 2013; Dormael, 2008; Tabyuna et al., 2015; Wang et al., 2011; Yu & Davis, 2016) that this study reinforces. HRD professionals can set up an organization-wide onboarding buddy program and ensure buddies are trained, have enthusiasm for the role, and are recognized and rewarded for that work. A buddy with a bad attitude is worse than no buddy (Chi & Wang, 2018; Liu et al., 2022). HRD professionals can pay attention to newcomers who may face more challenges in their onboarding—such as first-time job holders, diverse newcomers entering a predominantly white organization, and remote employees—and provide additional support when needed.

Although it generally is not considered in the research literature, receiving workplace resources is a critical material helping factor, not receiving them is a hindering factor, and newcomers hope to receive them. Lack of a work computer, access to systems, company car, purchasing card, medical clearance, or other administrative requirements frustrates newcomers and prevents them from either onboarding or getting to work. HRD professionals can prompt hiring managers to ensure all needed resources are ready to deliver prior to the newcomer's first day. HRD professionals can make it clear that onboarding is not finished when usual HR intake procedures such as

compensation, benefits, and compliance are completed. Hiring managers and coworkers take over from HR after the first day or two to continue onboarding. HRD professionals can facilitate this handoff.

This study confirms that onboarding takes at least several weeks (Cooper-Thomas & Anderson, 2002; Harrison et al., 2011; Rollag, 2004; Saks & Ashforth, 2000). The timeframe will be influenced by the size of the organization and complexity of the job. Among participants who completed all eight weeks of the diary study, hindering factors delayed successful onboarding, suggesting that rushing or overloading the newcomer to onboard quickly may backfire and lengthen the onboarding process. In this study, half of participants said they were fully onboarded at eight weeks and half did not, suggesting that eight weeks may be a pragmatic benchmark from which organizations can adjust up or down.

Implications for Hiring Managers

Hiring managers need to be present and available for onboarding and prepared to take the handoff from HR. After *Productive Interactions* with coworkers, *Work Assigned* and *Manager Support* are the next two helping factors. *Work Assigned* reflects the helping factor *Opportunities To Perform* from the literature (Bamberger et al., 2017; Ivanova & Klimova, 2021; Korte, et al., 2019; Molleman & Van der Vegt, 2007; Raghuram, 2011). Diary study participants mentioned one-on-one meetings with their manager 75 times. Hiring managers should assign a trained *Buddy or Mentor* to be the newcomer's go-to person for everyday questions and concerns. The buddy is not a replacement for the engaged manager; the buddy is a supplement to the engaged manager. By providing assignments and support, managers cultivate the individual

helping factor *Feeling Confident*. When a manager fails to provide support or guidance, newcomers become dissatisfied (Ghosh et al., 2013; Irving & Montes, 2009; Jokisaari & Nurmi, 2009, Korte et al., 2015). Lack of supervisor support leaves newcomer wondering what to do (Ivanova & Klimova, 2021; Korte et al., 2019), frustrated at the lack of direction (Korte, 2009) and also reluctant to seek help from coworkers (Ivanova & Klimova, 2021; Kulkarni & Lengnick-Hall, 2011).

Hiring managers can also *Facilitate Social Relationships* (Allen & Shanock, 2013; Bakker et al., 2022; Beenen & Pichler, 2014; Chu & Chu, 2011) so that *Productive Interactions* are possible. Hiring managers are also in the best position to encourage their new hires to *Be Proactive*, set guidelines for or model how to do it effectively (Filstad & McManus, 2011; Rollag, 2004; Wang & Kim, 2013), and set the expectation for their teams to be responsive to that proactivity, keeping in mind that *Awkward Interactions*, which range from mild to severe, was the third hindering factor in the diary study, reflecting *Apathy* (Bamberger et al., 2017; Kammeyer-Mueller et al., 2013; Korte, 2009) and *Undermining* (Beddoes, 2021; Chreim & Tafaghod, 2012; Liu, Zhang, Ji & Wu, 2021; Liu, Zhang, Zhang & Wu, 2021; Nifadkar & Wu, 2021), hindering factors from the literature. When they become aware of *Awkward Interactions*, hiring managers may need to address behavior that is uncivil or abusive.

Hiring managers need to be aware that the top hindering factor is *Information Overload*, also identified in the literature (Korte et al., 2015). How and when information, training, meetings, starter assignments, and other interventions are offered should be scheduled thoughtfully. They might reconsider or reschedule planned interventions that are intended to help the newcomer, but that actually hinder—as I did when I was a new

supervisor responsible for onboarding. The longitudinal analysis of study data provides some ideas about which interventions are needed immediately—like having an onboarding plan and providing resources—and which can wait until a second or third week, like introductions and assigning work.

Implications for Career Development Professionals

This study showed that even if their organization has an onboarding plan, newcomers are likely to encounter hindering factors during their onboarding and they will need to be proactive and resilient. First-time job holders in particular may lack the awareness or experience to do this (Carr et al., 2006; Chreim & Tafaghod, 2012; Wang et al., 2011). Career advisors, counselors and other career professionals in high schools, technical schools, colleges and universities, professional associations, and employment agencies can help prepare alumni, members, and clients to make a plan to manage their own onboarding.

Implications for Newcomers

This study showed that newcomers are proactive in their onboarding. They hope to *Make Allies, Manage Their Time Better, Perform Successfully, and Be Proactive*. Those hopes catalyze them to help themselves. Not all newcomers in this study were equally proactive. More experienced newcomers seemed to be more proactive. Newcomers who are not aware of the value of being proactive are at a disadvantage in their onboarding, so they should be prepared to be proactive in their onboarding by *Asking Questions, Observing Others, and Prioritizing Their Needs* during the onboarding period.

Newcomers will benefit from being aware that *Feeling Confident* and having a *Positive Attitude* are also helpful, and should consider ways they can cultivate *Resilience*. Even though they may feel pressure to perform successfully, learning and adjusting takes time, so newcomers should allow themselves to take the time they need.

The results from the diary study clarify and expand upon the individual helping factors from the literature, *Seeking Information and Feedback* (Ahuja & Galvin, 2003; Bauer et al., 2007; Beenen & Pichler, 2014; Beenen et al., 2016; Chan & Schmitt, 2000; Harris et al., 2020; Zheng et al., 2016) and *Proactivity* (Polach, 2004; Slebarska et al., 2019; Zheng et al., 2016).

Newcomers can plan to take action to ask for the organizational helping factors that are not provided to them by creating their own onboarding plan. Newcomers may need to be assertive and persistent in getting the resources they need to do their work. A *Buddy or Mentor* is a key organizational helping factor, so if one is not assigned, newcomers can find their own, perhaps by observing which coworkers respond positively to questions and requests for assistance. Among diary study participants, 24% said *Weekly Logging* was helpful and 18% said *Taking Notes* was helpful. Although those factors were below the 25% viability threshold, newcomers may benefit from keeping an onboarding notebook in which they capture daily notes on how to perform tasks, questions to ask, resources needed, and a weekly reflection on lessons learned. Perhaps the first individual helping action a prospective new hire can take is to ask about an organization's onboarding strategy during their interview, so they have *Clear Expectations*.

Implications for Onboarding Research

This study contributed to the onboarding literature in several ways. First, it was a qualitative study in a primarily quantitative field of inquiry. Instead of measuring the effectiveness of various deployed tactics, relying heavily on the Van Maanen and Schein (1979) tactics, new helping factors, new hindering factors, and new hopes were discovered from the perspective of the newcomers experiencing the onboarding. Themes were derived from the helping factors, hindering factors, and hope items to suggest a grounded model. Second, the literature was reviewed systematically to provide a clear assessment of what was known and not known about onboarding. Third, the diary study was a highly methodical research design for investigating onboarding, which is a process occurring over time (Allen & Shanock, 2013; Carr et al., 2006; Cooper-Thomas & Anderson, 2002; Dormael, 2008; Harris et al., 2020; Harrison et al., 2011; Kammeyer-Mueller et al., 2013; Rollag, 2004; Saks & Ashforth, 2000). Fourth, my interest was in providing practical results that can be implemented to benefit newcomers and organizations, so I chose the diary study method because it has been shown to be an effective workplace intervention (Fisher & To, 2012; Hyers, 2018; Korver, 2016). Several of my study participants reported the weekly logging as a helping factor. Fifth, although my results were not statistically significant, my study has demonstrated it is possible to investigate differences between groups in onboarding. Future onboarding studies could expand upon that. Sixth, my study showed that newcomers are proactive and agentic in their onboarding, beyond what was previously understood.

Limitations

This study used a small, purposive sample to collect data to explore and describe the onboarding experience from the perspective of the newcomer. The results are not generalizable. Participants were recruited on LinkedIn. According to the Pew Research Center (2021), about 28% of Americans say they use LinkedIn on a regular basis. Based on the demographics of LinkedIn users, study participants were more likely to make more than \$75K in annual income, be college graduates, and live in an urban or suburban area. Only individuals who had access to a computer and the Internet were able to participate in this study. The differences between subgroups were not statistically significant in most cases. New hires are already going through a stressful time, so their level of stress may have affected their ability to document their experiences. Their stress may have been a factor in study dropout. Workers are considered a vulnerable population, and may have considered participating in this study a risk to their livelihood, if their employer could identify them, and sanitized or softened their descriptions. Because participants completed the study *in situ* and independently, the investigator did not have control over how they reported their experiences. Some participants were terse or not very observant. Others were prolific, providing lengthy and detailed descriptions about their week, making it a challenge sometimes to determine what was most important. During the two check-ins, when the investigator shared the incidents and factors with participants, they may have been reticent to disagree or critique.

Recommendations for Future Research

Based on the results of this study, the methodological effectiveness of using a diary study versus retrospective interview for experiences occurring over time could be studied further. When I reviewed incidents from their logs written weeks earlier, it was common for participants to remark, “Oh yeah, I had forgotten about that.”

Future research could investigate and compare differences between groups of demographically similar newcomers such as early-, mid-, and late-career new hires, between racial groups, or between remote and on-site workers. This study suggested there may be some differences between such groups but did not have enough participants to make statistically valid conclusions, except for the impact of hindering factors on whether participants felt fully onboarded after eight weeks. A future study could allow for more time to recruit the needed diversity or even extend the study time to 12 weeks with follow-up interviews at 24 weeks and 48 weeks. Future research could investigate how long onboarding takes by organization size, type of industry, or type of job, and how “fully onboarded” is defined by the organization and by the individual. This study revealed the salience of psychological and social human capital as well as hope action theory and organizational theories in onboarding. Additional studies could investigate the relationships between these concepts further. This study revealed the importance of proactivity and resilience for newcomers, which could be investigated further. I have proposed relationships between helping factors, hindering factors, and hopes, as well as themes. Those relationships and themes could be investigated further.

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Appendix A

LinkedIn Recruitment Posts

Individual

Starting a new job? You might be just who I am seeking for my onboarding study.

I am seeking individuals who are starting new jobs for my dissertation research on onboarding. I am a graduate student at Penn State in the Workforce Education and Development (WFED) program. [#research](#)project

To learn more about my study, visit: <https://sites.psu.edu/onboardingstudy/for-prospective-participants/>

Network and Groups

Do you know someone who is starting a new job?

I am seeking individuals who starting new jobs for my dissertation research on onboarding. [#research](#)project #onboarding

You can help me by sharing this post with them.

To learn more about my study, visit: <https://sites.psu.edu/onboardingstudy/for-prospective-participants/>

LinkedIn Direct Message to Personal Contacts

Hi [name],

I'm reaching out to my connections to ask for your help in recruiting participants for my onboarding study. To help, just post the following information to your network and or any groups where it would be appropriate. I am providing the copy-and-paste text for your convenience, but feel free to revise it as you wish. Thank you!

My friend is looking for folks who are starting a new job for her dissertation research on onboarding. This is a great study and important work. Onboarding is such a critical factor in talent development -- it sets the foundation. She is giving participants incentives, too!

To learn more or sign up, visit: <https://sites.psu.edu/onboardingstudy/for-prospective-participants/>

Appendix B

Recruiting Website

<https://sites.psu.edu/onboardingstudy/for-prospective-participants/>

Study information for prospective individual participants

I am seeking individuals who have just accepted or are starting a new job for my dissertation research on onboarding.

I am a graduate student at Penn State in the Workforce Education and Development (WFED) program. The title of my research project is “Newcomer onboarding: What happens, what helps, what hinders, and their hopes.”

The purpose of this study is to better understand how newcomers experience the onboarding process—what happens to them, what helps them, what hinders them, and what they hope for—which should provide pragmatic recommendations for HRD practice that are grounded in newcomers’ actual experiences and needs.

Your participation is voluntary and confidential

If someone sent you this link, they will not learn from me whether you decide to participate in the study. Your participation in this research project is confidential, voluntary, and you may decide to end your participation at any time for any reason.

If you are interested in participating, here’s what I will ask you to do:

1. Complete a short online questionnaire to give consent to participate, provide basic demographic and contact information (Time required: 3 minutes)
2. Make an entry in a weekly online log I set up for you for 8 weeks about your onboarding-related experiences at least once a week or anytime you experience something you’d like to document. You can do it on a computer, tablet, or smart phone. (Time required: about 10–15 minutes for each entry for 8 weeks). You can try out the [sample version of the onboarding log](#).
3. Participate in two 15–minute Zoom interviews (with camera off), one after 4 weeks and the second after 8 weeks, clarify your entries and confirm that I have correctly interpreted them.

Why am I using this study method?

I am using a qualitative method, gathering open-ended written information from new employees, because most previous research on this topic has used quantitative methods

like surveys and statistics, and I feel the perceptions and experiences from the perspectives of the new employees have been ignored. Also, the weekly journal entry method is being used because previous studies of onboarding have called upon participants at a single point in time to remember what happened to them several weeks or months in the past, when they may have forgotten some things.

Outcomes and potential benefits to you

1. I will share a report of general findings with anyone I have contacted regarding this research project who wishes to receive it. The report will not identify any person or organization by their real name. I also intend to publish a research article about the findings to share new knowledge within the Human Resources and Talent Development field. My intention is to improve the practice of onboarding.
2. Daily or weekly journaling is considered a good practice for new hires to help themselves adapt to their new workplaces.
3. As a thank you for your work on this study with me, I will send you a \$25 Amazon gift card for every four entries you make in the log.

Next steps

If you are willing to participate in my research project, please go to the [Consent form and screening survey](#).

I will follow-up with you based on the information provided.

I am happy to answer any questions or concerns you have about the research project via email, Zoom, or phone. Principal Investigator

Angela M. Rogers

- Phone: 1-814-571-2942
- Email: amr115@psu.edu

Appendix C

Consent and Screening Questionnaire:

https://pennstate.qualtrics.com/jfe/preview/previewId/5c6c8d74-5172-413d-b95a-98adddeb371d/SV_6F3NT2vFonefvTf?Q_CHL=preview&Q_SurveyVersionID=current

Onboarding Study Consent and Screening Questionnaire

Start of Block: Block 1

Q1

1. Consent to Participate in a Research Study

Q2 You are being invited to volunteer to participate in a research study. This section explains the consent process and purpose of the study.

The purpose of this study is to explore helping factors, hindering factors, and hopes of newcomers during their onboarding at a new workplace.

Participants will be asked to participate in the following activities with the principal investigator (PI):

1. Complete this consent form and the qualifying questionnaire (takes about 3 minutes), to see if you fit the inclusion criteria for the study. The result will be inclusion or exclusion in the study, based on pre-set criteria.
2. If you consent and meet the criteria, instructions for the next steps of the study will be provided.
3. If you participate, you will be asked to complete an online journal entry at least once a week, using Qualtrics (this website), responding to short prompts, for 8 weeks. You can make entries on a computer or a smart phone. The PI may also ask follow-up questions by email to clarify your responses.
4. After 4 weeks of online journal entries, there will be a halfway point check-in interview. After the 8 weeks are finished, there will be a follow-up interview to make sure I have understood your information and you agree with my interpretation of it. Both these interviews will be conducted on Zoom with your camera off.

Incentives:

As a thank you for your work on this study with me, I will send you a \$25 Amazon gift

card for every four entries you make in the log.

Potential risks:

The risks to you as a participant are minimal and involve the likelihood and degree of harm or discomfort not greater in and of themselves than those ordinarily encountered in daily life.

There is a risk of loss of confidentiality if your information or your identity is obtained by someone other than the PI, but precautions will be taken to prevent this from happening. The confidentiality of your electronic data created by you or by the researchers will be maintained as required by applicable law and to the degree permitted by the technology used. However, absolute confidentiality cannot be guaranteed.

Protecting your identity:

A randomly assigned codename (based on Crayola crayon color names) will be used to protect the your identity. Only the PI will know the true identity of participants.

Contact information:

If you have questions, complaints, or concerns about the research, you should contact the PI Angela Rogers at 814-571-2942 or her dissertation adviser Professor Hyung Joon Yoon at +1 814 865 1876. If you have questions about your rights as a research subject or concerns about your privacy, you may contact the Penn State Office for Research Protections at 814-865-1775.

Your rights as a research participant:

Your participation is voluntary and you may decide to stop at any time. You do not have to answer any questions that you do not want to answer.

Next Step:

If you consent to participate, click "yes" below, and then click the arrow to go to the screening questionnaire.

Q3 I have read the above information about the study and I give my consent to participate in the research project to

explore helping factors, hindering factors, and hopes of newcomers in during their onboarding.

Yes (1)

No (2)

Skip To: End of Survey If I have read the above information about the study and I give my consent to participate in the res... = No

End of Block: Block 1

Start of Block: Block 2

Display This Question:

If I have read the above information about the study and I give my consent to participate in the res... = Yes

Q5 Screening Questions

Q6 Please provide an email where you can be contacted.

Q7 I have access to the Internet and can use an online device such as a smart phone, tablet, or computer to enter information.

Yes (1)

No (2)

Q8 Prior to being contacted about this study I did not personally know the Principal Investigator, Angela Rogers.

True (1)

False (I did know her) (2)

Q9 I can read and write in English.

Yes (1)

No (2)

Q10 The year I was born.

Q11 The day, month, and year I start or started my new job.

Q12 The county, state, and country where my new job is located (Example: Centre County, Pennsylvania, USA):

Q13 Describe the general purpose of your work organization:

Q14 What is the size of your work organization?

- small (fewer than 99 employees) (4)
- medium (between 99 and 250 employees) (5)
- large (more than 250 employees) (6)

Q15 My racial or ethnic identity is:

Q16 My gender identity is:

Q18 Are there any known barriers or challenges to your participation in this study, for example that would prevent you from making an online journal entry about your onboarding experiences at least once a week for 8 weeks?

Yes (describe barriers or challenges below) (1)

No (2)

Q18 How did you hear about this study?

End of Block: Block 2

Start of Block: Block 3

Q19 The PI Angela Rogers will be in touch with you about next steps.

End of Block: Block 3

Appendix D

Onboarding log

https://pennstate.qualtrics.com/jfe/preview/previewId/aa72bd04-63ec-4db4-891f-768db470bb24/SV_3WTAT7tuN7akGVM?Q_CHL=preview&Q_SurveyVersionID=current

Onboarding Log

Start of Block: Instructions

Q1

The purpose of this weekly log is to gather information from you as a newcomer about what helps, what hinders, and what you hope for in your adjustment to your new job, a process known as onboarding. The more detail you can share the better. Your writing will not be judged for spelling or grammar. Everything you write here is confidential. At a minimum, please log information once per week. In addition, You can log in anytime something related to your adjustment happens that you think is important.

As a thank you for your work on this study with me, I will send you a \$25 Amazon gift card for every four entries you make in the log. If I am unsure about what you mean or need more information about a particular item, I will ask you a follow-up question via email. I hope that participating in this process of weekly logging, or self-reflection, you also gain some useful insight into your adjustment to a new job. At the midpoint and at the end of the weekly logging time, I will interview you to review what you have provided to make sure I have correctly interpreted your information.

End of Block: Instructions

Start of Block: Weekly log

Q2 Enter your codename

Q3 Thinking about the past week at your new workplace, how has your adjustment been going?

Q4 Based on your response to the first question, how would you rate (with 10 being excellent) your adjustment to your new job this week?



0 (0)

1 (1)

2 (2)

3 (3)

4 (4)

5 (5)

6 (6)

7 (7)

8 (8)

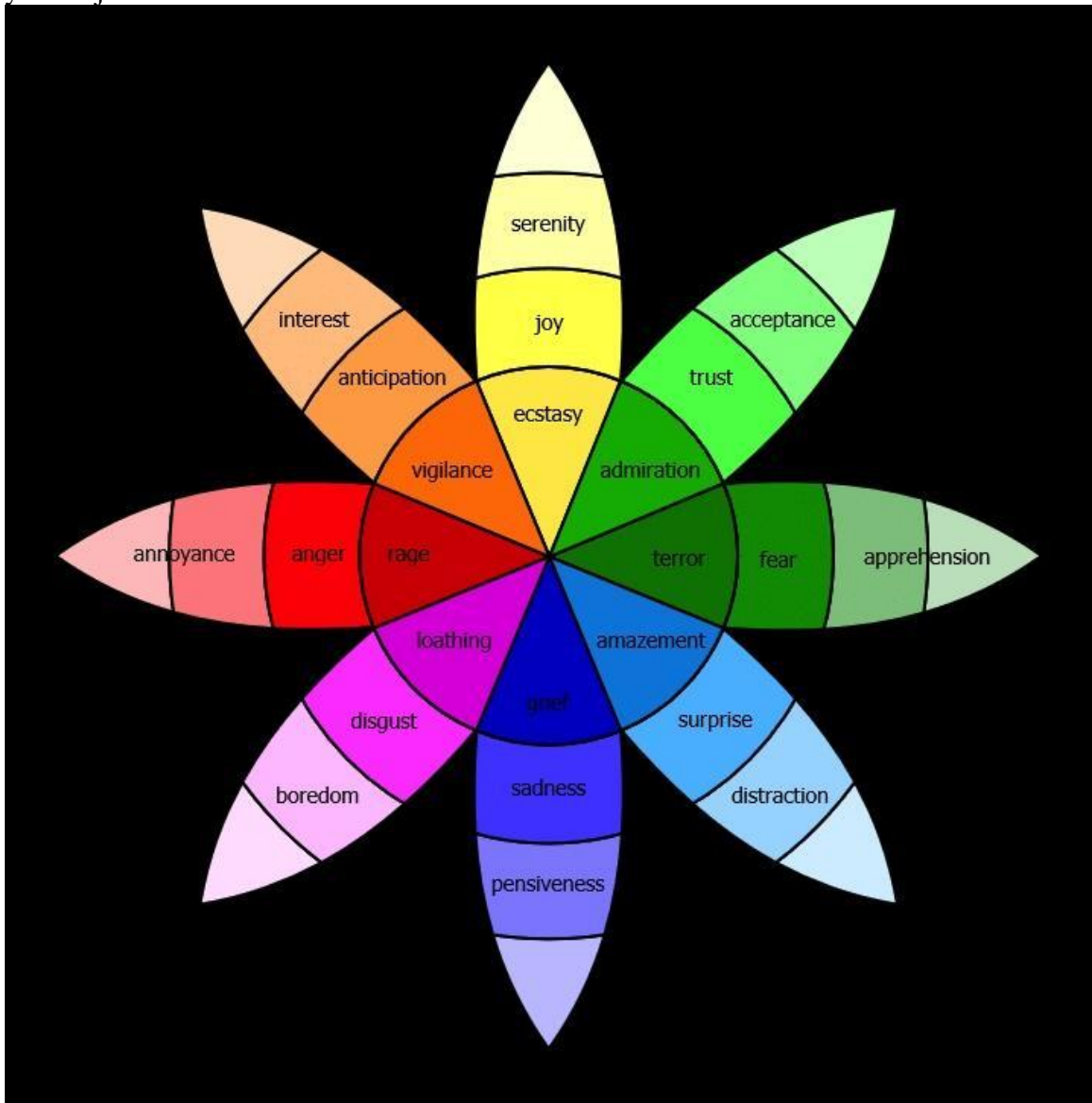
9 (9)

10 (10)

Q5 Thinking about the past week, what was helpful to you in adjusting? Please say as much as you can to describe what happened, what it meant to you, how it helped, what led to it, what happened next.

Q6 Thinking about the past week, what made it difficult for you to adjust? Please say as much as you can to describe what happened, what it meant to you, how it hindered, what led to it, what happened next.

Q7 Click on the area of the emotion color wheel to indicate how you are feeling about your adjustment this week.



Q8 Reflecting on your experiences this week, what would you hope for to help with your adjustment?



Q9 Anything else you'd like to share or ask of the researcher?

End of Block: Weekly log

Appendix E

Onboarding Study Mid-Point Check In Interview Protocol

Participant codename	
Interview date and time	
Remind participant camera off, no recording	
Log dates	
Answer any questions or concerns	
Ask about emergent demographic variables	<i>Degree of change?</i> Different industry, same industry Similar job, different job Geographic change remote working Other <i>Level of work experience?</i> Early career Middle Late Other
Factors and Categories review	
Notes from conversation	
Email for gift card	
If 4wk Checkin: Continuing for another 4 weeks?	

Appendix F

Onboarding Study Closing Check In Interview Protocol

Participant codename	
Interview date and time	
Remind participant camera off, no recording	
Factors and Categories review	
Additional notes from check in	
After 8 weeks, do you feel fully onboarded?	
Email for gift card	

VITA

Angela Michele Rogers

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