Creating an Effective Newcomer Experience in a Global Remote Work Environment

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FALL 2021

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Fall 2021

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About the Author

Kate Hayes Carhart – For the past twelve years, Kate Hayes Carhart has worked in various roles dedicated to talent management, specifically focusing on learning and development, leadership and management training, and onboarding and acclimation of new employees. She currently manages the NY Supervision Learning Team at the Federal Reserve Bank of New York. She is responsible for the design and delivery of local development opportunities through technical and interpersonal training to deepen both individual and collective expertise.

Kate holds a Bachelor of Science in Interdisciplinary Studies from New York Institute of Technology, where she graduated with honors and received the Israel Louis Schure Award, conferred for outstanding performance in leadership. In 2013, she earned a Master of Professional Studies in Human Resources and Employee Relations, specializing in Employment Law from Pennsylvania State University. She is certified in Instructional Design & Facilitation by New York University, School of Professional Studies.

In 2014, Kate became a registered volunteer side-walker with GallopNYC, using horsemanship to inspire children and adults in NYC with developmental, emotional, social and physical challenges. She is a member of the Advocacy Collective for the Planned Parenthood Action Fund to advance legislative priorities for reproductive justice and serves as a Women2Women Circle leader, mobilizing women to form local groups to break isolation and practice feminist values in action. She currently serves on the leadership committee for the WoMEN's Network at the Federal Reserve Bank of New York, as the Volunteer Chairperson.

Acknowledgements & Dedication

This project and the completion of my doctorate would not be possible without the endless support of my family, friends, colleagues, and Vanderbilt faculty and peers.

Thank you to Dr. Quinn Trank, for your guidance, support and ongoing believe that I could complete this project. From watching your asynchronous videos in LLO 8110 – Leadership Theory and Practice, to being paired with you as an advisor, I have been continuously impressed and inspired by your work.

Thank you to all of my work colleagues, and specifically my mentor, John Esposito. Your fearless leadership and unwavering support of my endeavors, both personal and professional, has been one of the greatest examples of authentic and selfless leadership I have witnessed.

To my dear friends, the Liu and Louder families, thank you for your tireless efforts to keep me sane and motivated. I have interrupted our family vacations, bogarted office space, and ended many virtual and in-person events early because I had homework or research to do. Thank you for not only tolerating me over the past three years, but cheerleading my academic pursuits, serving as my perpetual hype-man, decorating my home for holidays, and helping in every other way imaginable.

To my sister, Emily Bailey, everyone deserves someone in their life to remind them that there is still plenty of time and to trust your gut. For me, you fill this role on a regular basis. For major life decisions, personal and professional, I have relied on your sage wisdom to give me strength and courage. I am eternally grateful for you.

My unending gratitude and appreciation are owed to my parents, George & Myra Hayes. Beyond the proverbial parental thanks, they deserve special acknowledgement for their willingness to drop anything and everything to help when it was needed most. They have cleaned my home, made dinners, washed dishes and laundry, hung curtains, organized closets, tended the yard and a plethora of other chores that would simply never have been done under my watch. Even in retirement, they are the hardest working people I know.

To my husband, Jason, you are the reason all of this has been possible. There are many people who thought getting married and having children while pursuing a doctorate was madness. But for some reason, it sounded like a great idea to you and you have always encouraged me to keep moving forward. Thank you for giving me this beautiful chaos, filled with babies, work, exhaustion and love.

And finally, I dedicate this work to my daughters, Cricket & Maisie. You have been the inspiration and driving motivation through the entirety of this process. This project is the sum of many sleepless nights, missed events, long days, tired eyes, and even a few tears. Since I was small, academic achievement has not come easily for me. But one day, if you are faced with a challenge, I hope you might think of me and believe you can do it, simply because I could do this. Because hard things are worth doing and learning is always a worthy endeavor. It will have all been worthwhile for that. I love you more.

Executive Summary

LearnBot is a leading provider of live, avatar-based simulations and an industry leader in immersive virtual reality (VR) training. What sets LearnBot's proprietary platform apart from competitors is its blend of artificial and human intelligence, using "VR- Virtuosos," or live actors in the environment, who listen and respond to learners in real-time. The organization's goal is to lead the way in creating more empathetic and emotionally adept employees. Companies hire LearnBot to build a safe place for their employees to practice difficult human skills and interactions without performance anxiety or risk to individual reputation.

LearnBot identified a challenge in onboarding and acclimating sales employees across the country, in multiple time zones in a fully remote work environment. Leadership within the sales team is looking for an onboarding program that can (1) create a sense of inclusion and network building; (2) foster cross-group collaboration in vertical sales structures; and (3) emphasize continuous development as an organizational priority.

The purpose of this quality-improvement project is twofold. First, it will identify the key challenges of the current onboarding program, which the company believes delays time to productivity. Second, it will provide new and creative solutions to increase time to productivity, acclimation to the organization, and connection to critical stakeholders and coworkers.

Problem of Practice

The LearnBot Sales Team does not have a consistent onboarding program to acclimate new hires. Sales leadership has taken a haphazard approach to the newcomer experience, resulting in varying orienting practices when new hires join the organization. Changes to the onboarding program have been based on the personal opinions of leadership and individual new hire suggestions; however, they have not been grounded in successful evidence-based orienting practices.

Current new hires participate in a one-week onboarding session that provides a general overview of the organization, a demonstration of the technology, products and tools they will be asked to sell, and a high-level review of expectations and the performance management process. The sales leadership has evidence from new hires and managers alike that employees are not quickly ready for their work. With over 85% of their employees working remotely across the United States, it is critical that the sales team develop an onboarding approach that immediately prepares staff to work and collaborate effectively.

Image: (Freepik, 2021)

Research Questions

Research Question 1: What are the current perceptions of the onboarding process at LearnBot?
Research Question 2: What factors encompass an effective virtual sales onboarding program?

Findings

1. Orientation is too focused on technical sales expertise.
2. Employees lack the required resources to engage and participate actively in onboarding processes.
3. Welcome and celebration tactics are rarely (if ever) experienced as a new hire.
4. New hires desire formal processes and policies about socialization and networking.
5. Orientation and onboarding do not afford psychological safety to new employees.

Recommendations

Recommendation 1: Create a sales specific welcome guide and roadmap for new hires and managers

- Recommendation 1a: Build robust welcome practices that are required for managers and team members
- Recommendation 1b: Include a new hire resources check list and stakeholder analysis with networking map

Recommendation 2: Integrate virtual reality through LearnBot products into the newcomer experience

Recommendation 3: Incorporate sales staff throughout the acclimation process

- Recommend 3a: Require sales staff to host orientation
- Recommendation 3b: Formalize a new hire mentorship program
- Recommendation 3c: Develop monthly learning sessions and roundtables led by sales staff

Introduction

LearnBot[1] is an industry leader in immersive virtual reality (VR) training. The organization's uniqueness lies in its focus on emotional intelligence and interpersonal skills, topics other VR and artificial intelligence training systems have yet to achieve at LearnBot's level. The organization's goal is to lead the way in creating more empathetic and emotionally adept employees, using VR simulations that feature immersive interactions with human-guided avatars, known as "VR- virtuosos." Companies contract with LearnBot to build a safe place for their employees to practice difficult human skills and interactions without performance anxiety or individual reputational risk.

LearnBot has identified a challenge in onboarding and acclimating employees from across the country, in multiple time zones, within a fully remote work environment. The primary areas of concern for the onboarding program includes: (1) creating a sense of inclusion and network building; (2) fostering cross-group collaboration in a vertical sales structure; and (3) building continuous development into the organizational fabric for their employees.

This problem of onboarding in a virtual environment is not unique to LearnBot. Global corporations are frequently faced with the task of managing multiple time zones and collaboration challenges. Even more so, after the COVID-19 pandemic in 2020, many organizations shifted to a full-time remote working environment. As corporations investigate the benefits of a remote, home-based workforce, the benefits are clear: financial savings, added employee flexibility, work-life balance, a more sustainable workforce, and increased recruitment

[1] LearnBot is a fictitious organization name. The pseudonym was created for the partnering organization to ensure marketing and sales searches related to the product were not impacted by this quality improvement project. All individual participant names have also been changed.

potential. Yet, these benefits can only be realized if the business remains operationally effective and continues thriving in the new environment.

Organizational Context

LearnBot is the leading provider of live, avatar-based simulations in the world. Launched after nearly a decade of research and development, LearnBot's proprietary platform blends artificial and human intelligence with live actors who listen to and respond to learners, in real-time through avatars. This approach creates highly authentic and realistic practice and assessment opportunities in leadership and other interpersonal skills. The conversations can also be scored and recorded to deepen reflection and drive behavior change. Research demonstrates that four simulation sessions produced a significantly higher change in targeted behaviors than traditional forms of professional development. As LearnBot describes their value proposition, employees of all levels across industries need a safe place to practice human skills and behaviors such as emotional intelligence, adaptability, and resilience in an authentic, risk-free environment where the danger of harming the individual's performance and company's reputation is mitigated. LearnBot has created a customizable, virtual environment for practicing interpersonal skills consistently and cost-effectively to meet that need.

Organizational Background

LearnBot is the largest immersive practice company for leadership development and other soft skills, working with approximately 100 Fortune 1000 and Global 500 firms across a wide range of industries and delivering thousands of leadership simulations each week. The organization works with an additional 150 higher education institutions and government agencies to deliver simulations for a wide range of professions, such as teaching, hospitality, and medical training. With a home base in San Francisco and a secondary hub in Atlanta, Georgia, LearnBot has a team of nearly 150 full- and part-time staff, making it the largest VR company focused on interpersonal skills. LearnBot has the capacity to deliver approximately 10,000 simulations per week within six weeks of receiving a contract. They currently offer 33 off-the-shelf simulations for leadership and diversity, equity, and inclusion. These scenarios allow learners to practice a variety of leadership and emotional management skills. Empathy is at the heart of most scenarios, but other key strategies include: (a) rapport building; (b) active listening; (c) asking powerful questions; (d) making connections; (e) providing effective feedback; (f) building shared ownership of solutions and next steps; (g) resolving conflict and de-escalating emotions; (h) influence without authority; and (i) inclusion.

Mission & Goals

The LearnBot mission is simple: to improve human interactions. The company believes that immersive practice in simulation increases interpersonal skills by unlocking the potential of the individual. The avatar simulations provide psychological safety to allow for the immersive practice of difficult interactions, which we face daily. Psychological safety is a critical factor in the successful practice of new skills, as it allows the learners to make mistakes and learn from failure (Abror & Patrisia, 2020). Learning and development teams are clamoring for technology solutions that offer participants engaging, efficient, and safe ways to “learn by doing” – as well as practical and personalized experiences that can be integrated with new skills into daily routines.

In the work-from-home environment, more than ever, global companies are seeking solutions that offer them insight into the performance abilities of their frontline staff and the capacity to test skill acquisition after training is delivered. LearnBot provides a virtual environment where professionals of various industries can practice complex interpersonal skills to become more effective in their roles.

LearnBot accomplishes this by using a hybrid platform combining cutting edge artificial intelligence with live improvisation actors to create powerful scenarios that focus on soft skill development. According to LearnBot, this blend of technology and human performance delivers a fully immersive simulation environment, where the learner can safely fail and take risks, thus producing the ideal learning environment.

Purpose of the Study

The purpose of this project is twofold: to identify key challenges of the virtual onboarding environment within the sales team and to propose new and creative solutions for its new and continuing staff. These solutions seek to provide staff the knowledge to be adequately prepared for the role, quickly become acclimated to the organization, and continuously be connected to critical stakeholders and coworkers, so they are successful on the job. Given that the organization focuses on providing training driven by emotional intelligence and learning nuances, LearnBot leaders are looking for an evidence-based onboarding process that increases time to productivity. The study was requested by Michael Mitchell, Vice President of the Outside Sales Team, based on the feedback of LearnBot leaders.

Organizational Stakeholders

There are four critical stakeholders at LearnBot: Brooke Hernandez, Sandy Wisneski, Michael Mitchell, and the Sales Team. Brooke Hernandez is the Chief Learning Officer, and is charged with leading efforts in the scenario design process to align simulations with key competencies that clients ask to develop in their employees. Her team is working to clarify accurately measurable learning outcomes. Sandy Wisneski is the Chief Revenue Officer, overseeing the Sales and Marketing departments at LearnBot. She is the direct supervisor of Michael Mitchell, who requested the study. Ms. Hernandez and Ms. Wisneski have a vested interest in the sales team's success, as each of their priority objectives in the organization requires extensive collaboration and knowledge of sales staff to inform future clients.

Michael Mitchell is the Vice President of Sales. He is the initiator of this project and research, and he has identified onboarding as a current problem within the organization. He responded to an outreach communication requesting potential partnership opportunities for organizations with a problem of practice related to learning and development. A copy of this communication is in Appendix I. Mr. Mitchell is responsible for expanding LearnBot's training platform to new markets and securing partnerships to fund research and development efforts.

The Sales Team is the means through which these goals will be achieved. There are two tiers of sales staff, including Business Development Directors (BDDs) and Sales Development Representatives (SDRs). The main distinction between them is the level of experience in sales and numbers supervised (BDDs have direct reports). All sales staff have a minimum of two years of relevant industry experience and are known to thrive in a fast-paced, high-growth sales environment.

Problem of Practice

In the fall of 2020, LearnBot secured additional financing after meeting critical internal performance milestones. The new funding was the first of many signals that LearnBot was moving beyond the initial startup stage. The organization had also recently rolled out a new and intricate software upgrade, including photorealistic avatars and environments with enhanced learning analytics (Yu, 2020). The shift to virtual learning remains a priority as the global pandemic continues, a trend that has made LearnBot's product a high-demand commodity.

All these changes have led to an increased emphasis on the sales structure and staffing for 2021.

Problem Statement

The LearnBot Sales Team does not have a consistent onboarding program to acclimate new hires. The sales team leadership has taken a haphazard approach to improving the newcomer experience, resulting in varying orienting practices and substantial changes after each new hire joins the organization. Changes to the onboarding program have been based on the personal opinion of leadership and suggestions of newly-hired individuals; they are not grounded in successful evidence-based orientation practices.

Current new hires participate in a one-week onboarding session that provides a general overview of the organization, a demonstration of the technology, products, and tools they will be asked to sell, and a high-level review of the expectations and the performance management process. The sales leadership has evidence from both new hires and managers that employees are not ready for their work quickly enough. With over 85% of employees working remotely across the United States, the sales team must develop an onboarding approach that prepares staff to be immediately effective and work collaboratively.

Since sales are the driver for LearnBot's entire expansion plan, this team must be efficient and effective. The sales team defines effectiveness and efficiency as proactively managing the sales cycle from prospecting through deal closure/procurement within six weeks by appropriately marshaling personal and internal organization resources. To address these needs, this study will focus on reviewing the current onboarding practices of the sales team and looking at what an effective, virtual onboarding program would look like in the future. The following questions guide this research:

- Research Question 1: What current factors prevent new hire productivity at LearnBot?

- Research Question 2: What factors encompass an effective virtual sales onboarding program?

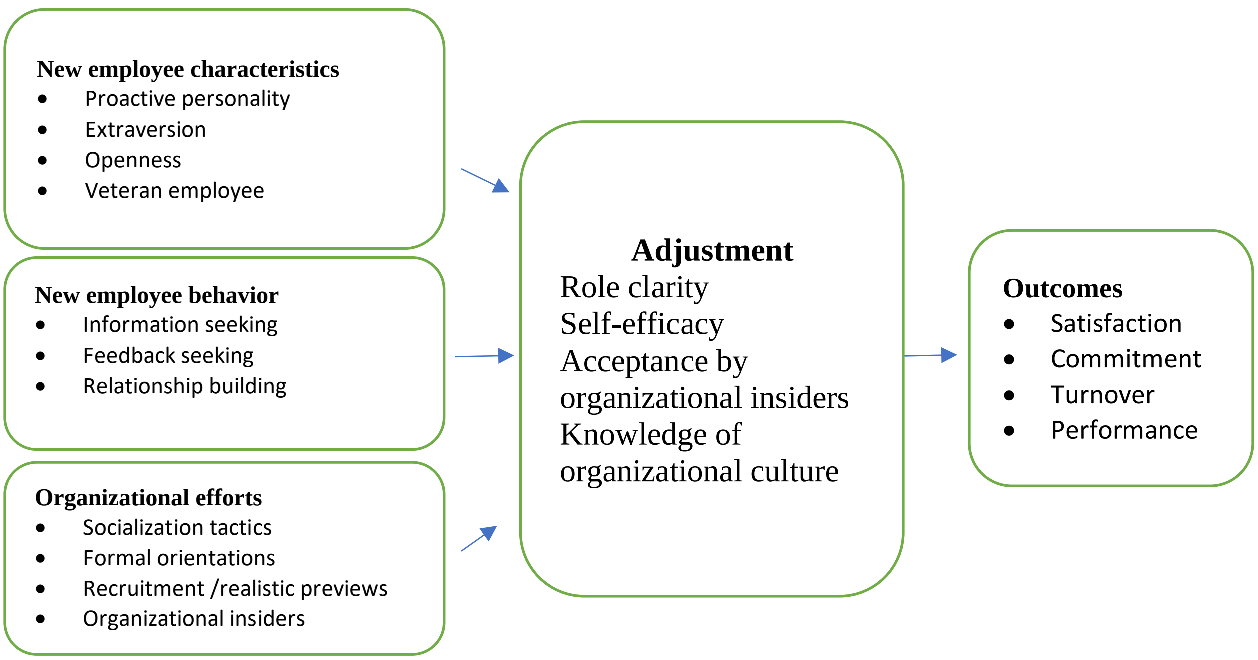
Literature Review

The onboarding process is recognized as a critical component for successful employee performance and retention. Organizations with successful onboarding programs are more likely to have employees with positive attitudes, see higher retention levels, and reduce rates of wasted time and resources related to turnover (Bauer et al., 2007). Research and evidence associated with the impact of onboarding programs are vast. For this study, the literature review was narrowed to focus on the concepts of organizational socialization, sensemaking, and transfer of training. While each of these topics varies slightly from the other, all three are beneficial to the successful acclimation of an employee into their new role. Although limited, new research and evidence related to onboarding in the virtual environment has also been reviewed to inform the connections and departures from the research of traditional, in-person onboarding mechanisms.

Organizational Socialization

Onboarding, also referred to as organizational socialization, is defined as the process in which new employees transition from outsider to insider (Bauer & Erdogan, 2012). Organizational socialization is mutually beneficial and has become increasingly important to organizations and individuals. With increased workforce mobility, individuals rarely remain at one organization for the duration of their career and instead change jobs on average of 10.2 times over 20 years (Bauer et al., 2007). Socialization is associated with many benefits to the individual, including job satisfaction, self-confidence, increased role clarity and career effectiveness (Chao et al., 1994, p. 731). Reichers (1987) recognizes that the process of organizational membership, or becoming an effective insider, involves mutual participation between the organization and the individual, known as the interactionist perspective. This mutual influence includes the organizational efforts and investments, from recruitment through hiring and acclimation, as well as the individual efforts as newcomers manage uncertainty and develop an understanding of performing the job they were hired for (Anderson, 2001).

Bauer and Erdogan (2011) summarize a general model of socialization, which examines socialization factors, including individual and organizational influence, under the categories of new employee characteristics, new employee behaviors, and organizational efforts (p. 52).



A summary process of socialization (Bauer & Erdogan, 2011, p. 52)

Given that the LearnBot Sales Team employees have already been recruited and selected, the focus of this study will be primarily on new employee behaviors and the organizational efforts to support employee socialization. Saks and Ashforth (1996) showed that personality traits, such as proactive personality, can significantly impact the speed at which an employee can adjust to the organization. Research later showed that proactive personality is related to adjustment variables and directly correlated to positive socialization outcomes (Kammeyer-Mueller & Wanberg, 2003, p. 790). Experienced employees are also likely to be more successful in the socialization process, given their previous work experience in similar roles provides a sense of task competence and likely contributes to more realistic expectations about the job (Adkins, 1995). Regardless of how much experience one has, each major role change still involves socialization into the new role and creates a certain degree of disorientation and sensory overload (Louis, 1980).

New employee behavior focuses on the actions that the newcomer controls as an active participant in the socialization process, including information-seeking, feedback-seeking, and relationship-building (Bauer & Erdogan, 2011). Several factors outside of organizational onboarding tactics can impact new employees' on-the-job success and speed to productivity. New employee behaviors differ from the antecedent of personality, as behaviors are independent on individuals' disposition; however, certain personality types may find these behaviors are more natural or require less effort. As research related to the virtual workplace surfaces, new employee behaviors are likely to impact the socialization process significantly. During the onboarding process, informal activities that support ideal new employee behavior, such as a quick conversation with a manager after a team meeting (feedback-seeking), small talk at the coffee station (information-seeking), or an impromptu happy hour with coworkers (relationship-building) occur less frequently, if ever, in the remote work environment. These reductions in opportunities to engage in new employee behaviors negatively impact socialization (Hemphill & Begel, 2011).

Many organizations now understand the value of onboarding and have adopted formal onboarding programs to increase retention and speed up time to productivity in new hires.

Accelerating the transition from newcomer to effective insider creates a competitive advantage for organizations, as they can begin to monetize the benefit of the new hire sooner (Perrot et al., 2014). The faster an organization can transition their new employee, from a newcomer into an effective insider, the greater their advantage.

Organizational efforts are the various programs and processes that the organization implements to support socialization. The tactics can range from institutionalized, in which a formal onboarding program with various sequential support mechanisms is followed, to individualized, in which employees begin work immediately and the process is random and informal (Jones, 1986, p. 263). While institutionalized and individualized tactics both have benefits and challenges, research has shown institutionalized tactics produce desirable outcomes relative to job attitudes and decreased voluntary turnover (Bauer et al., 2007). However, one important deviation is that institutionalized tactics negatively impact role innovation, which may be critical for certain industries and roles (Ashforth & Saks, 1996). It is important to remember that organizational tactics exist on a scale, as opposed to a binary option of completely institutionalized or completely individualized. The kinds of tactics being used do not prescribe the trade-offs for role innovation and superior performance. Instead, Ashforth and Saks (1996) note, “Whether a given socialization tactic results in high or low role innovation and performance depends on what is learned, not on how it is taught” (p. 170).

In roles where innovation is required or desired, organizations must be strategic about their socialization tactics on the continuum of institutionalized to individualized. Through the socialization process, newcomers use learning to reduce uncertainty in their role (Perrot et al., 2014). The process of joining a new organization can be overwhelming and daunting. New employees are unaware of what to expect and are inundated with new experiences and interactions daily. Uncertainty reduction theory posits that newcomers are motivated to increase the predictability of their interactions and experiences to minimize the uncomfortable feelings related to uncertainty (Berger, 1979). With consideration to the uncertainty reduction theory, institutionalized tactics have an important advantage, as they provide structured approaches for learning that help newcomers adjust to their roles.

Sense Making

Out of growing concerns around retention and voluntary turnover, crucial gaps were identified in organizational entry and socialization approaches based on appreciating what newcomers experience during the transition period and how they cope with their experiences. From a historical perspective, the entry phase of employment has been studied from two predominant perspectives, including turnover, specifically voluntary turnover, and organizational socialization.

Newcomer expectations are a critical factor associated with voluntary turnover, and have been further categorized by two approaches related to expectations. The first approach attributes voluntary turnover to unrealistic or inflated expectations, while the second approach distinguishes unmet expectations focusing on the initial entry period on-the-job compared to pre-entry recruitment practices (Kotter, 1973).

Louis (1980) proposes that change, contrast, and surprise constitute major features of the entry experience (p. 235). Change is defined as the elements that differ between the previous role and situation, compared to the new role and situation, irrespective of the changes being positive or negative. The more changes that exist, the more the individual must cope with. Contrast is defined as person-specific differences in a new setting that emerge based on prior experiences. A key distinction between change and contrast is visibility and awareness. Factors of change are predominantly public and knowable, whereas contrast is based on personal experience and is largely unknown in advance. While both change and contrast are important factors in the new entry experience, they are more personally noticed and experienced.

Surprise is defined as the entry experience that represents the difference between an individual's anticipations and subsequent experiences in the new setting (Louis, 1980, p. 237). Surprises may be positive or negative and can be linked to one's job, role, the organization, or themself. Sensemaking is one of the ways individuals in organizational settings cope with entry experiences such as surprises. Sensemaking can be defined as the role of conscious thought in managing and coping (Louis, 1980, p. 239). Further developing the concept, Karl Weick (1995) expanded on sensemaking outside of the newcomer experience as an alternate approach for understanding the process of organizing (Helms et al., 2010, p.182). Specific to the organizational context, Weick et al. (2005) described sense making as:

> …a sequence in which people concerned with identity in the social context of other actors engage ongoing circumstances from which they extract cues and make plausible sense retrospectively, while enacting more or less order into those ongoing circumstances (p. 409)

Although Weick's work expanded beyond the newcomer experience, the approach to sensemaking is still relevant to onboarding practices and organizational tactics. Sensemaking activities are most needed in complex and challenging contexts, where the need for understanding is particularly important – a description that accurately maps to the onboarding experience (Maitlis, 2005).

When a predicted outcome does not occur, an individual's cognitive consistency is threatened, leading to a discrepancy between predicted and actual outcomes, which produces a state of tension. The individual must then develop an explanation to help resolve this tension.

This retrospective explanation is produced through the process known as sense making. These explanations help individuals explain unpredictable experiences and bridge the gap between actions and expectations – providing reasons for outcomes (Louis, 1980). This tension and ability to resolve through sense-making are potential contributors to perceived organizational support (Klein et al., 2015).

Sense making occurs throughout all stages of employment whenever members of an organization confront events, issues, or actions that surprise or confuse them (Maitlis, 2005, p. 21). The needs of a newcomer related to sense making differ, however, from that of organizational insiders. Most simply, insiders generally know what to expect in situations, drawing on past experiences, limiting the amount of surprise faced, and feeling the need to have things make sense. When surprises arise for tenured employees, as organizational insiders, they typically have sufficient context through experience to interpret the situation more accurately than newcomers. Lastly, when sense-making is necessary, the insider usually has built relationships that can be leveraged to test perceptions (Louis, 1980).

Transfer of Training

For this study, onboarding has been identified as a form of training, leveraging the definition set out by Brown and Sitzmann (2011) of "formal, planned effort to help employees gain job-relevant knowledge and skills" (p. 469). As Saks (2014) suggests, transfer of training has direct implications for organizational socialization. The primary purpose of organizational socialization can be defined as a learning process as newcomers process information and adjust their behaviors and mindset (Klein & Weaver, 2000). Learning has been clearly accepted as a critical component of the socialization process. Chao et al. (1994) developed a scale of six dimensions to measure organizational learning content, which was later improved upon by creating the Newcomer Socialization Questionnaire (NSQ). The NSQ, designed by Haueter, Macan, and Winter (2003), measures factual knowledge and knowledge of expected role behaviors across three dimensions of newcomer socialization. Learning and training programs, such as orientations and formal onboarding courses, effectively reduce newcomer anxiety and inform new hires. While research revealed orientations and other new employee training programs could be effective in supporting the socialization process, they have primarily been examined in relation to whether or not the newcomer participated in these tactics, as opposed to an assessment of the learning content and transfer of training (Saks, 2014).

For training to be successful, there must be a positive transfer of training. Baldwin and Ford (1988) define the positive transfer of training as: "the degree to which learners effectively apply the knowledge, skills, and attitudes gained in a training context on the job" (p. 63). For this study, training will be defined as the systematic and formal tactics that provide knowledge and skills related to what employees need to know, what they need to do, and what they need to feel to successfully perform their jobs (Grossman & Salas, 2011).

Baldwin and Ford (1988) created a model for the transfer process, including inputs, outputs, and the conditions of transfer based on their qualitative review. Saks (2014) adapted this to present a model for transfer of socialization. In this model, training inputs are shown to be central for learning and retention. Both models include motivation and perceived utility as inputs of successful transfer. Research shows that new employee motivation is highest during the first 90 days on the job (Takeuchi et al., 2021). Perceived utility is described as the learner's perception that the training is useful and valuable, making them more likely to apply it on the job. It can be surmised that in the newcomer experience, transfer of training would be most successful if it takes place in the first 90 days, where motivation is high and is perceived to be immediately applicable.

Conceptual Framework

Klein and Heuser's (2008) conceptual framework of Inform-Welcome-Guide (IWG) incorporates all formal and informal practices, programs, and policies enacted or engaged in by an organization (or its agents) to help socialize new employees (Klein & Heuser, 2008, p. 316). The Inform-Welcome-Guide Framework of onboarding builds on the foundational work of socialization conducted by Van Maanen and Schein (1979). It incorporates the instructional design components of learning conditions and experiences by Gagné and Briggs (1974) to evaluate specific onboarding practices and assess their effectiveness of those practices in facilitating newcomer adjustment.

Klein and Heuser (2008) posit that the learning of socialization content involves organizational tactics and practices, social agents, and newcomer proactivity, and includes successful application of learning outcomes. With this in mind, their work takes an instructional design approach of socialization in order to identify not only what kind of orienting activities are most effective at forming socialization but how to structure those activities for optimal learning and transfer (Klein & Heuser, 2008).

These activities and structures are divided within the three categories of Inform, Welcome, and Guide. The IWG framework was created by gathering insights from textbooks on staffing and training and by examining organizational websites cited by practitioner literature as exemplars of effective orientation. From this material, the authors created a typology of common practices, shown in Figure 1. The largest category of orientation activities, Inform, aims to provide newcomers with information, including all efforts to provide information, materials and experiences to excel in the new role. Given Information is the largest category with a majority of activities falling within it, it was subdivided into three types: communication, resources and training. Communication includes one-way messages and two-way dialogues, inclusive of written and verbal forms of communication. Resources is defined as making materials available, and for the purposes of this study will include all onboarding materials, internal documentation, templates, and required materials for successful job performance. Training refers to the activities which are planned in order to facilitate learning for the new hire. Each of these subcategory definitions are outlined by Klein and Heuser (2008) from *The Learning of Socialization Content* (p. 318).

The welcome category consists of efforts aimed at celebrating the arrival of the new employee and providing opportunities for him/her to meet and socialize with other members of the organization. The last category, Guide, includes efforts to provide a more “hands-on” personal guide to help newcomers navigate the transition. For example, the Guide category includes active, direct assistance, such as a buddy or mentor, who can help new hires navigate from naïve outsider to effective insider (Klein, et al., 2015).

Figure 1: Typology of Socialization Practices (Klein & Heuser, 2008)

Table 4. A Typology of Socialization Practices.

Category of Activities	Sub-Categories	Description of Category or Sub-Category	Examples of Activities
Inform		Activities that provide information, materials, and experiences	
	Communication	Planned efforts to facilitate communication with newcomers. Includes both the provision of one-way messages and opportunities for two-way dialogues	Providing a brochure during recruitment outlining benefits and opportunities Scheduling a conference call question and answer session for new hires
	Resources	Making materials or assistance available to new hires. These efforts differ from communication in that the new hire has to take the initiative to access them	Having a section of the company website just for new hire with things like a glossary of company terms and a list of key contacts Having a newcomer hotline
	Training	Planned efforts to facilitate the systematic acquisition of skills, behaviors, knowledge	Formal orientation programs (online or classroom based, company wide or specific to the work unit) Training on job skills (on-the-job or off)
Welcome		Activities that provide opportunities for new hires to meet and socialize with other organizational members and/or celebrate the arrival of the newcomer	Planned activities to ensure new hires meet their coworkers and other key individuals Receiving a welcome phone call from an executive
Guide		Activities that provide a personal guide for each new hire	A formal “buddy” system that assigns an experienced coworkers to each new hire A welcome coordinator that oversees all aspects of the orientation process

Project Design & Methods

This study examined qualitative data to answer the research questions proposed. This quality improvement project aimed to uncover the current newcomer sales experience within the organization and optimize orientation practices to increase time to productivity in the sales team's future new hires. The conceptual framework of IWG by Klein and Heuser (2008) is followed, taking an instructional system approach to socialization. This approach was selected over various other methodologies of socialization because it identifies the kinds of orienting activities most effective for learning different socialization content dimensions and provides insights into structuring those activities to provide an optimal learning environment for that type of learning (Klein & Heuser, 2008, p. 320). While Klein and Heuser (2008) exclude proactive behavior of the newcomer, they include the actions within the organization's control that promote, facilitate, and maximize proactivity.

Klein and Heuser's (2008) framework for orienting practices also includes a three-dimensional perspective of what employees need to master at different levels by different points in time. Socialization is an ongoing process over time, so several distinct time frames are suggested. Within this study, several distinct time frames were identified—first day, first week, first month, and first 90 days—to align to the organization's desire to have sales staff productive as quickly as possible. Additionally, in this three-dimensional framework, the level of socialization was explicitly recognized across job/role, work group, unit, and organization. Since this study focuses explicitly on the sales team, job/role and work group levels have been isolated from unit and organization. The last consideration was related to the virtual work environment. After observing the first onboarding orientation, direct references to the virtual environment were removed from the interview and focus group questions. The purpose was to limit the potential bias from framing the virtual environment as a barrier and uncovering it if it was a challenge or an issue, as leadership suspected.

Data Collection

Data was collected through observation of onboarding orientations, interviews with LearnBot executives and Senior Business Development Directors (BDDs), as well as focus groups with cohorts of recent new hires. All data was collected virtually due to the ongoing pandemic and the given standard of LearnBot as a remote workforce. While LearnBot executives and Senior BDDs were interviewed individually, new hires were grouped into cohorts to understand any changes or differences based on when the new hire started, which orientation session they attended, and to promote conversations of sensemaking and shared experience. All interview and focus group participants were recommended by Michael Mitchell and communicated with in advance of the session. Each participant was provided a high-level description of the project and made aware that participation was voluntary. Full interview and focus group protocol can be found in Appendix III.

Observation

Three onboarding orientations were observed between January and August of 2021. All orientations were facilitated by Michael Mitchell, Vice President of Sales, with specific segments supported by various internal LearnBot employees. All three orientations were scheduled to last three full days, initially in a cadence of Tuesday-Thursday. Due to scheduling conflicts and other internal conflicts, all three were rescheduled at least once and split across a full five-day work week (Monday-Friday). Access to the files and materials shared within the orientation programs were shared by LearnBot through Google Documents, including the agenda with facilitator notes, Knowledge Base for Sales Operations, Process Map for the Organizational Design, Spoken Success Stories, Meeting Templates, and the Onboarding Presentation Deck. A sample copy of the orientation agenda is included in Appendix II. All other documentation is considered confidential and was used for contextual reference only.

Interviews

Interviews were conducted with eight leaders within the LearnBot organization, including group leaders and senior BDDs (Table 1). LearnBot leadership was identified by Michael Mitchell, based on their role and potential impact that the sales team has on their function and vice versa. Seven leaders across various functions in the organization were suggested, and outreach was initially set up by Michael Mitchell through an email (Appendix IV) requesting their participation. Follow up communications were sent individually to confirm interest and availability for scheduling. Three leaders confirmed interest and availability within the specified timeframe: Sandy Wisneski, Brooke Hernandez and Dawn Edison. Within the sales team, there are six teams dedicated to specific industries, which the sales team identifies as verticals and is led by a Senior BDD. Of the six verticals, two Senior BDDs were included in a cohort of new hires (having joined the organization in the past six months) and invited to an individual interview. One Senior BDD participated in both the focus group and the individual interviews and one Senior BDD declined to participate in the interview. The remaining four Senior BDDs participated in one-on-one interviews to provide the sales management perspective.

Table 1: Interview Participants

Name	**Job Title**	**Department / Team Name**
Hannah Frank	Senior Business Development Director	Outside Sales / Clydesdale
Wendy Drake	Senior Business Development Director	Outside Sales / Thoroughbred
Dawn Edison	Director of Sales Operations	Outside Sales & Marketing
Rosa Walker	Senior Business Development Director	Outside Sales / Arabian
Linda Plunkett	Senior Business Development Director	Outside Sales / Mustang
Brooke Hernandez	Chief Learning Officer (CLO)	Learning & Development

Sandy Wisneski	Chief Revenue Officer (CRO)	Sales & Marketing
Michael Mitchell	Vice President of Sales	Outside Sales Team

Interview questions were developed to understand the content, level and temporal dimensions of socialization as designed by Klein and Heuser (2008). The questions were framed in two categories of (1) the current state of onboarding, to understand the challenges, and (2) the future, ideal state of onboarding, to assess what an effective virtual onboarding program at LearnBot might require using the dimensions of content, level, and time. Table 2 shows the questions that were asked and the research question they address.

Table 2: Interview Questions Correlated to Research Questions

Research Question	Question
What are the challenges of the current onboarding process?	What are the most common issues or challenges that new hires raise to management?
	What are the most challenging experiences in managing new hires and the onboarding process?
	What are the biggest gaps from your perspective with the onboarding process?
What factors contribute to an effective virtual onboarding program for the LearnBot Sales Team?	What are your expectations for a new hire on the first day?
	What are your expectations for a new hire in the first week?
	What are your expectations for a new hire on the first month?
	What are your expectations for a new hire on the first 90 days?
	Describe the critical benchmarks for sales team members when they join LearnBot.
Closing	Is there anything I haven't asked about that you think would be helpful to know?

Focus Groups

Five focus groups were conducted to capture data on the newcomer experience. New hires were broken into five cohorts based on their hiring dates. Two of the cohorts had previously completed orientation before the study began; therefore, the focus groups were scheduled based on mutual availability of the participants and the researcher. For the remaining three cohorts, the focus group was automatically scheduled to take place after completing their orientation week. Table 3 shows a list of all participants, their job title, and assigned vertical team with the associated industry of focus. Fifteen new hires accepted the invitation to the focus groups, representing 100% of sales team new hires as of August 2021. Since the time of the data collection, three participants have voluntarily resigned from LearnBot.

Table 3: Focus Group Cohorts

Cohort	Name	Job Title	Team	Industry Vertical
Cohort 1	Joseph Johnson	Senior BDD	Friesian	Tech
	Rob Smith	BDD	Mustang	Finance
Cohort 2	James Gravely*	BDD	Clydesdale	Government /Military
	Leslie Dubois	Senior BDD	Appaloosa	Education
	Scott Long	BDD	Appaloosa	Education
Cohort 3	Allen Misdur	Director Inside Sales	NA	NA
	Aliyah Jala Almasi	BDD	Arabian	Professional Services
Cohort 4	Carrol Callas	Associate BDD	Friesian	Tech
	Lindor Roldán	Associate BDD	Arabian	Professional Services
	Jeremy Martin*	BDD	Thoroughbred	Healthcare
	Marianne Seay	BDD	Arabian	Professional Services
	Hannah Frank	Senior BDD	Clydesdale	Government /Military
Cohort 5	Brandon Stark	BDD	Thoroughbred	Healthcare
	Thuy Brown*	BDD	Mustang	Finance
	Gloria Simmons	BDD	Thoroughbred	Healthcare

** has since resigned from LearnBot*

All focus groups took place virtually through Zoom. Each session began with an introduction by Michael Mitchell, outlining the purpose of the focus group and the researcher's role and previous experience with LearnBot. After providing the opening remarks, the session purpose and how information would be used, Michael Mitchell exited the Zoom call. The researcher explained that all data and any direct comments would only be shared at the aggregate level and would not be attributed to any individual. Participants were then asked for permission to record the session for transcription purposes only and were assured that the recordings would not be shared beyond the researcher. The focus groups followed a semi-structured approach to provide consistency but also allow for group shared experience and sensemaking to be uncovered. The same ten questions (Table 4) were asked in all focus groups, with additional follow up and clarifying questions asked as needed. Focus group questions were categorized by the IWG framework of Klein and Heuser (2008). All participants were allowed to respond to each question and follow-up on comments made by others before moving to the next question or category.

Table 4: Focus Group Questions

Category	**Question**
Inform – Communication	1. Describe the communications you received as a new hire. 2. Of all the communications you received, which have you kept or referenced?
Inform – Resources	3. How did you access materials? 4. How did you get questions answered as a new hire?
Inform – Training	5. Describe your orientation experience. 6. What experiences most prepared you for your role?
Welcome	7. Can you tell me a story about when you felt celebrated or accepted as a new hire?
Guide	8. Who did you turn to for advice or guidance on the job? 9. Who do you turn to now?
Closing	10. Is there anything I haven't asked about that you would like to share or think would be helpful for me to know?

Data Analysis

Field notes from observing orientations were reviewed and developed into observation memos, which included the orientation agenda, resources and communications that were distributed, researcher notes and relevant comments by participants that were captured. All transcripts and memos were then coded using the IWG Framework, with additional codes emerging through open coding. Table 5 shows the theme, qualitative code with the definition, and frequency of occurrence.

Table 5: Code Definitions

Theme	**Qualitative Code**	**Definition**	**Frequency of Occurrence**
Information	Communications	Inclusive of formal and informal communications, including emails, written correspondence, and two-way dialogues.	15
	Expectations	Clarity on what is expected of the new hire and when.	13
	Resources	Materials, templates, documentation, websites (internal/external), PowerPoint presentations, articles, and technology required for job performance.	18
	Training	Planned/formal efforts with the intention to facilitate learning	8
Welcome	Networking	Opportunities (or lack of) to engage and build relationships with others	6
	Accessibility/Availability	Ability to meet or communicate with others based on actual or perceived responsiveness and interest of the other party.	10
	Introductions	Activities or experiences that provide exposure to new individuals	11
	Isolation	Left to one's own devices, lacking connection to direct team members and/or management	12
	Leader Engagement	Communication and interaction with organizational leadership (inclusive of Senior BDDs and above)	11
Guide	Virtual Environment / Remote Work	The conditions of working from home and across geographic boundaries and time zones	3

	Culture	Expected organizational norms that guide values and practices of employees	4
	Values	Organizational beliefs that guide or motivate employee attitudes and actions.	7
	Safety	Ability to participate in activities and/or conversation without fear of negative consequences.	12
Expertise	Technical Expertise	Previous sales experience or proficiency related to performance and ability.	8
	Tenure	Length of employment in the organization	4
	Industry Experience	Experience not related directly to sales, rather focused on specific vertical/market knowledge.	4
	Utility/Application	Opportunity and/or ability to use knowledge or skill on the job.	9

After the initial coding, transcripts were then reviewed for themes and searched for common phrases and examples. A third round of analysis was completed to understand which research question the emerging theme aligned with. For comments that identified specific challenges related to resources and communications, materials collected in observation were cross-referenced for accuracy and accessibility. For example, the organizational structure was discussed across all five focus groups as a pain point and was cross-referenced with the materials provided in the orientation observations, noting that the links provided for the LearnBot Sales Team Org Chart and other corresponding structure documentation were inactive or not updated.

Concerns and Limitations

The major limitations of this project involve the inconsistency of the newcomer experience across participants and the researcher's potential bias. The newcomer experience varies greatly based on a multitude of factors, including personality traits, behaviors, and orienting practices (Bauer et al., 2014). This study isolated the focus to orienting practices to make quality improvements on the factors the organization solely controlled. This research took place while changes were already being made internally to the sales orientation process – including vast changes to the orientation program and expectations of the new hire. All three orientations observed had substantial revisions, materials varied across presentations, and expectations of the new hires who joined the organization between January and March differed significantly from the expectations outlined for new hires joining between June and August. Due to time constraints, the researcher was the only reviewer of the qualitative data, leaving room for bias to be a potential factor.

Findings

Five findings were consistently identified across all data sources. The findings are identified below, including the source of the data. Notably, the virtual environment and remote work were not significant factors in challenge related to the current orientation and onboarding practices. The few times the virtual work environment was raised, it was described as a positive experience and/or benefit to the new hires. Although LearnBot leadership had expressed concern about the virtual work environment and multiple time zones as a potential challenge to the onboarding process, this did not bear out in the data analysis.

Findings Snapshot

Finding	Data Source
Orientation is too focused on technical sales expertise	Observation Focus Groups
Employees do not have the all the required resources to actively engage and participate in the onboarding process.	Observation Focus Groups
Welcome and celebration tactics are rarely (if ever) experienced as a new hire.	Focus Groups Interviews
Formal processes and policies for how to engage in socialization and networking are desired by new hires.	Focus Groups Interviews
The orientation and onboarding do not afford psychological safety to new employees.	Focus Groups Observation

Finding 1. Orientation is too focused on technical sales expertise

Individual interviews and focus groups revealed most new hires believed the orientation program was too heavily focused on sales practices. New hires had varying degrees of exposure to LearnBot as an organization and extensive sales experience in related fields (primarily in the sale of training content). The orientation program at LearnBot is currently spread across three full days, covering both organizational content and sales-specific training. Across 24 hours of orientation, approximately six hours are focused on organizational-specific topics. The remaining hours are spread across topics that include prospecting and targeting clients, account planning, cold calling, scheduling a demo with potential clients, meeting follow-ups and meeting framework, procurement, forecasting and budgeting, successful engagements, and project expansion.

> *"We know the goal of any sales team – it's in the title. When you have significant tenure, less focus should be required around the fundamentals."*

Recent new hires shared that a substantial portion of the orientation segments focused heavily on junior sales information. One new hire noted:

> *"We spent way too much time covering Winalytics. For a day one sales person, sure, maybe they need that. But we're all experienced hires and it felt really unnecessary."*

By spending time on generic sales practices, less time is spent on the vision and values of LearnBot overall. According to recent hires, this time would be better spent helping new hires understand what sets LearnBot apart as an organization in the virtual reality training space. As LearnBot continues to grow, staff have found it challenging to keep up with changes. The organizational chart alone was referenced in every interview and focus group, from hard to understand to simply where to find it or access a copy of it. The organizational design accounts for only 15 minutes of the current orientation structure. Similarly, specifics such as the organization's formal philosophy on feedback and performance management are not included in the orientation at all. New hires also shared that the sales specific information was received too early in the process for many of them to put into practice. For those new hires who attended orientation in the first days or weeks on the job, a large portion of the content was challenging to process and retain, given missing pieces of information, such as understanding who the critical stakeholders are, how the sales teams are connected, or what short- and long-term expectations were as individuals and as a team. This content was described as "too detailed for the initial onboarding process" and would be more helpful if it could be referenced on an "as needed" or in the moment basis further into the onboarding process.

Finding 2. Employees lack the required resources to engage and participate actively in onboarding processes

Through observation, interviews and focus groups, it was noted that one major barrier to the success of the onboarding process was having the appropriate resources to engage with. For the purpose of this research, resources were defined as supplies, materials and equipment (excluding human resources and networks, as these were defined separately under guidance). Over a quarter of sales new hires described in the focus groups that they did not have the required or necessary resources on or before their first day on the job. One participant noted that they received their work laptop in advance of their first day, but it was unfortunately not functional. After a week of troubleshooting both hardware and software issues, they switched to working from their personal laptop for weeks until the problems were resolved. This created a considerable number of inefficiencies for the individual and added a layer of stress and anxiety to the onboarding process. Two other participants noted they used their personal equipment for the first week of work, and another individual shared they were unable to access any LearnBot files for the first two weeks on the job. Resource challenges were not limited to physical equipment. Many interviews and focus group members described the challenge of accessing and comprehending the onboarding materials provided. All materials for the onboarding process are shared using Google Drive. Within the attached agenda for orientation, links to additional documents and PowerPoint decks are included. The orientation agenda identifies a column for the time, theme, activity, goal, resources and prework, and facilitator for each day. The agenda is shared via the calendar invitation for the orientation event. It does not include instructions for how to leverage the document or set expectations for the experience and activities of each day. During the interview process, multiple Senior BDDs discussed their frustration with ever-changing materials and issues with version control. All interviewees that raised the issue of resource improvements noted that the improvements were necessary, but the current process of ongoing updates was causing more issues than it was solving. If changes are going to be made to resources, staff would like there to be a protocol for how the updates are made and where the most up to date document resides. One focus group member described the issue:

"I keep hearing that you find the org chart here – or – that document is in the Google Drive there – but I can't actually ever find it. Sometimes I have found a version of the document I'm looking for, but not one that was used in orientation or the most up to date."

When discussing resource materials, one interviewee stated that documentation "felt less structured and formal than other organizations I've worked at. It feels very informal and real time. Things are being put together as we ask for them." Many recent new hires also noted that providing instructions for how to leverage the materials that are shared would be helpful. Setting expectations before the session of what materials will be covered, what should be read in advance or reviewed after would be immensely beneficial. Some new hires also felt it would be useful to have a checklist for awareness and to ensure they have the necessary materials and equipment – to avoid being unaware that something is missing. As an example, one new hire didn't know they didn't have access to a specific file drive until after orientation – and then they weren't sure who to go to for help.

Finding 3. Welcome and celebration tactics are rarely (if ever) experienced as a new hire.

One of the most common themes across interviews and focus groups was the lack of welcome and celebration tactics that new hires experience. This came as a suprise to newcomers, given the culture and values of LearnBot as articulated by the organization. Over one-third of the focus group participants said they were not contacted by their direct manager on the first day of employment. In focus groups and interviews, this was attributed to how busy managers are – but it raised early concerns for when it is appropriate to "bother" your manager. The fact that contacting the direct manager was regularly referred to as "bothering" them was also notable. Beyond contact with management, there is also limited contact with direct team members and other colleagues. Less than half of focus group participants were introduced to immediate team members on their first day. Only a third had been introduced to additional colleagues during their first week on the job. Newcomers were left to their own devices to set up meetings with colleagues to introduce themselves. This process led to varying degrees of success for new hires. For those who did feel successful navigating the first week of introductions, the majority described the process as challenging and likely unreasonable for those in a more junior role or with less experience. Multiple new hires claimed their ability to meet and connect with the people they needed to was strictly attributed to their personality and communication style. For those who were less successful, the process was described as isolating, stressful, anxiety inducing, and unrealistic.

> *"Our culture screams 'I'm so busy!' – which translates to leave me alone unless it's critical or an emergency."*

> *"Having pre-scheduled meetings with core team members and stakeholders would have been really helpful. Having it be self-directed left me a little overwhelmed."*

The lack of welcome practices had a clear impact on the overall onboarding process for new hires. Many described the missing welcome elements as signs that the onboarding process was not formal and that the organization was still "operating like a start-up."

Finding 4. New hires desire formal processes and policies about socialization and networking.

With little to no welcome processes in place, the majority of new hires said that one of the most challenging aspects of joining the organization was learning how to network and create connections. As the organization continues to expand, navigating through multiple functions has become more difficult. Recent hires described confusion around what is appropriate outreach to senior executives within the organization. As an example, one employee noted that in a traditional start-up, one would likely not hesitate to reach out to the CEO or president. Yet, as LearnBot has placed an emphasis on moving past the startup phase, there isn't clarity on the culture of networking and expectations of executive communication. The issue begins from the first day on the job, as little to no communication or direction is provided on who new hires should connect with and when. The problem is presented by new hires as a gap throughout the onboarding process, glaringly highlighted by the lack of a clear organizational chart or department map. Across all interviews and focus groups, participants described the organizational chart was rarely, if at all, referenced, shown, or provided. When the organizational chart was provided, it was usually out of date and the source location was never provided. Given the ongoing changes within the organization, version control was noted as an ongoing struggle. In one focus group, as the conversation developed about the org structure and chart, one participant said, "Yeah, pretty sure I saw that

"I was somewhat left to my own devices to figure things out on an as needed basis. You have to leverage a network and building that too was individually driven."

somewhere…but I couldn't tell you where." Focus group participants described feeling pressured to reach out to other colleagues but lacked confidence.

We were provided an org chart, but it was first names only. I really had to do some research to find people. And then I had to ask myself, is it appropriate for to reach out to the head of products yet? Should I be waiting for an introduction?

Participants described using a thank you email to the individuals they met during the recruitment and interview process as a means of connecting to avoid the perception that they needed something from a colleague so early on.

While socialization and networking are important aspects of the new hire experience, they also provide a critical connection for how team members learn to get things done. The lack of formal connections and prescription around outreach were described as consequential barriers to getting work done in the early days on the job. One new hire, who had joined the organization two months prior, stated with frustration: "How do I get immediate answers? That's important to me and I still don't really know." As the conversation of values and culture was raised at a focus group, participants remarked about executive leadership, noting CEO emails are excellent, they help the culture resonate, and provide motivation and drive for the salesperson. Many focus group members reported a sense of "goodness," noting the communication by Clive Hughes (LearnBot Chief Executive Officer) was described as graceful with co-workers and the concept of doing well by doing good. Yet, confusion exists around access to leadership. The organization feels small enough that a more personal introduction by senior leadership appeared reasonable as voiced by numerous focus group attendees.

Finding 5. Orientation and onboarding do not afford psychological safety to new employees.

Psychological safety is defined as the perception that people are comfortable acting as themselves and can be present in the workplace without fear of consequences to their status or career (Carmeli et al., 2009). Since learning depends on members sharing knowledge and the associated social process, psychological safety is a critical factor in the learning across and within an organization. This concept is one that LearnBot is extremely familiar with. Psychological safety is a key selling point of the VR Training model, boasting that learners can experiment in a safe setting and practice without fear of reputational damage in their organization. Throughout their training, this point is emphasized to the sales staff as a key factor to highlight with prospective clients. Yet, this is not the experience for sales staff within their orientation and onboarding process. The Vice President of Sales leads the current orientation program. The role of the Vice President as a facilitator in orientation was raised numerous times in both interviews and focus groups. The orientation methodology should be consistent with the organization's mission. Performance anxiety is what the organization is working to minimize or eliminate, but it hasn't applied this value to its internal offerings. During orientation, multiple activities are scheduled to provide new hires with the opportunity to practice sales skills using LearnBot specific data and information. While in theory, the process of application for learning is a positive, the execution has failed to achieve the desired results. Focus groups revealed most new hires were surprised by the expectation to deliver a demonstration early in their tenure, and noted their discomfort with their senior leader overseeing the process.

"It was interesting to see orientation led by the VP of Sales – it was great for visibility but higher pressure and very intimidating. We preach psychologically safe spaces but this didn't feel that way."

"Michael is great but having your boss doing your demo is intimidating. Are we safe to fail? Is there an assessment already happening on day one? The spirit is there but it doesn't change the vibe."

"Having your skip level boss as the lead facilitator was tough for security purposes. It felt hard to ask question or let your guard down and feel safe to ask the dumb questions, fail or try something new."

Participants were quick to point out that the opportunity to test their knowledge and comprehension of LearnBot specific content was a beneficial activity. The most prominent concerns were the oversight of a direct supervisor or senior leader and the surprise nature of the activities. New hires want to know when activities will require them to participate in exercises with an audience and want additional time to prepare for such engagements. Multiple focus group participants noted they felt "surprised" or "thrown off guard" by realizing they would be sharing their pitch during the session. One interview participant said "I reviewed the agenda, but even then, I didn't realize I should have been preparing anything. I felt like I needed more time to digest the material and would appreciate not being put on the spot in front of my boss."

"The days are packed and there is little clarity on expectations. A couple of moments of "it's your turn to do something" which felt really out of the blue and without warning. There were a few unrealistic expectations of what you should be ready to do and when it will be expected of you."

"Probably would be better to have a trainer lead these specific sessions. Fish bowls are used in the orientation, even though we generally don't recommend our clients do that – training should be 1:1 to promote comfort and safety."

Recommendations

In the next three years, LearnBot has committed to doubling revenue by reaching $100 million in sales. Driving that expectation is the continued expansion of the sales staff and increased hiring across verticals. The following recommendations are aimed at addressing the findings previously identified and creating an effective virtual onboarding program for the

LearnBot Sales Team beginning on day one for new hires. Each recommendation addresses specific findings, highlighted in the Recommendations Snapshot. Recommendations are aligned to the Inform Welcome Guide framework and include multiple subcomponents to address specific requirements of each associated finding. Building on the Inform, Welcome, Guide framework, Klein, Polin and Sutton (2015) demonstrated the value of looking beyond broad socialization tactics and examined specific onboarding practices within the IWG framework to assess their effectiveness. Each of the categories within the IWG framework reflects a different purpose; therefore, it is recommended that multiple practices from each category are offered.

Recommendations Snapshot

Recommendation	Related Finding
Recommendation 1: Create a sales-specific welcome guide & roadmap for new hires and managers	• Orientation is too focused on technical sales expertise • Welcome and celebration tactics are rarely (if ever) experienced as a new hire. • Employees do not have the all the required resources to actively engage and participate in the onboarding process.
Recommendation 2: Integrate virtual reality through Learnbot products into the newcomer experience	• The orientation and onboarding do not afford psychological safety to new employees.
Recommendation 3: Incorporate sales staff throughout the acclimation process	• Formal processes and policies for how to engage in socialization and networking are desired by new hires. • The orientation and onboarding do not afford psychological safety to new employees.

Recommendation 1: Create a sales-specific welcome guide & roadmap for new hires and managers

To expedite the process of sales newcomers becoming fully functioning organization members, a structured onboarding process should be created and consistently followed for all new sales employees and their managers. Focus groups and interviews said that employees regularly do not have the required resources to engage and participate in the onboarding process, which is frequently due to being unaware of what to expect or what resources are required. By creating a clear roadmap for the sales team specifically, newcomers and their managers can reduce the uncertainty and anxiety that frequently accompanies the newcomer experience. Within this roadmap, the sales onboarding process should identify the welcome practices that are required by managers and team members and include a new hire checklist of resources and activities to help newcomers navigate the onboarding experience.

Recommendation 1a: Robust welcome practices required by managers and team members.

An onboarding roadmap is a simplistic solution on its own, which would be insufficient if it only included required steps for the newcomer. Instead, the Sales Team Welcome Guide and Roadmap must address the activities with the explicit goal of celebrating the new employee, expressing appreciation that they have joined the organization, and providing insights on how newcomers can meet other organization members. These practices are designed to address the emotional needs of newcomers and help them develop the social capital required to be successful in their role (Klein et al., 2015). These practices must include directives for the new hires direct manager to contact the employee on their first day on the job, or assign a delegate in the event they are unavailable or out of the office. A timeline for introduction of the new employee's direct team members, other sales associates, and relevant critical stakeholders should also be identified and these introductions should be orchestrated by the direct manager (or delegate).

Recommendation 1b: Check list of resources and stakeholder analysis with networking map

The information category encompasses all the efforts to provide materials, communications and experiences that inform the newcomer in the transition from outsider to functional insider (Klein & Heuser, 2008). The current onboarding process within the sales team lacks a number of necessary resources that new employees need in this transition period. The sales team should complete an inventory of all required documents, communications, templates, and materials that are necessary for the successful onboarding of a new hire. This list should be developed into a checklist that can be leveraged by both the new hires and their manager. This will help ensure that new employees have the required resources available to actively engage and participate in the onboarding process and minimize inefficiency in the onboarding process. Additionally, focus groups identified that formal processes and policies for how to engage in socialization and networking are desired by new hires. By integrating a stakeholder analysis into the onboarding process, new hires are provided a structure process to understand how and when they should engage with specific stakeholders, as well as begin the critical process of navigating the organizational landscape. A sample of a stakeholder analysis can be found in Appendix V.

Recommendation 2: Integrate virtual reality through LearnBot products into the newcomer experience

LearnBot products are designed to be innovative and psychologically safe ways to increase learning. However, the focus groups and observations revealed that learning relative to onboarding had limited to less than ideal transfer due to the anxiety and risk-aversion newcomers faced in many local onboarding practices. Interviews and focus groups also identified that receiving information is a meaningful factor in transfer and application. Training utility refers to the extent to which trainees perceive it to be useful in their job (Saks et al., 2007). It was noted that newcomers regularly didn't know the context or utility of a specific training session or process when it was originally provided in the orientation experience. Many further detailed how it would have been helpful to have access to this information and/or experience at a later date when utility was higher. Both of these issues could be addressed by utilizing the technology that LearnBot already owns and sells. By developing training experiences in the virtual environment supported by the LearnBot artificial intelligence and a VR Virtuoso, a psychologically safe onboarding training experience could be created. Another benefit of the VR simulations at LearnBot is that they are recorded, allowing new hires to review the content and experiences at a later date, when perceived utility has increased.

In the current structure, orientation is delivered on an ad hoc basis. Because the orientation schedule varies, a new hire could receive orientation during their first week on the job or during the second month. This inconsistency results in information that is either too in-depth for the new hire to comprehend or repetitive for those who have already had to learn informally before the orientation. By moving key components of the orientation to pre-recorded sessions or into the virtual environment that can be scheduled as needed, new hires can receive the necessary information and content at the appropriate time, on-demand.

The LearnBot sales team should assess the content and expectations across temporal dimensions but should also examine which components of the onboarding process would benefit from being removed from the live-instructor led sessions to the virtual reality space. An example of the programs that would benefit from the LearnBot product has been outlined in Table 6. This list is not exhaustive and would benefit from internal review and expansion. The example is based on the combination of observation and focus group notes relative to areas where participants expressed discomfort or unpreparedness with engagement in the activity or a lack of psychological safety.

Table 6: Sales Onboarding with Virtual Reality Experience

Experiences / Topic	**Current Delivery**	**Suggested Delivery**	**Follow-Up Opportunity**
Prospecting and Targeting	Live instructor led session (45 minutes) Facilitated by Michael Mitchell during orientation day 1.	Recorded session led by VR- Virtuoso (avatar). Shared during Week 1 of New Hire Experience.	Reminder to review sent during One Month Check-In
Story Time & Case Studies	Live instructor led session (90 minutes) Facilitated by Michael Mitchell during orientation day 1.	Recorded session including various BDDs sharing personal experiences. Shared during Week 2 on the New Hire Experience.	Updated quarterly to include new and additional success stories.
Product Demonstration	Live instructor led session (120 minutes) Facilitated by Michael Mitchell during orientation day 2.	Experience led by a VR-Virtuoso using the Virtual Reality Environment 1:1 with new hire. Multiple opportunities to practice the product demonstration beginning in Week 2 of the New Hire Experience.	Made available ongoing throughout the onboarding experience.
First Meeting Protocol	Live instructor led session (60 minutes) Facilitated by Michael Mitchell during orientation day 2.	Recorded session led by VR- Virtuoso (avatar). Shared during Week 3 of the New Hire Experience.	Available for review ongoing with a reminder shared once the first client meeting has been scheduled.
Follow-on Meetings	Live instructor led session (120 minutes) Facilitated by Michael Mitchell during orientation day 3.	Recorded session led by VR- Virtuoso (avatar). Shared during Week 4 of the New Hire Experience.	Available for review ongoing with a reminder shared once the first client meeting has been completed.

Recommendation 3: Incorporate sales staff throughout the acclimation process

Interviews and focus groups frequently commented on the overfilled and hectic schedules across all departments at LearnBot. This was commonly noted as a rationale for why sales team members and even managers did not regularly engage in the onboarding process for new hires. Newcomers shared that this lack of interaction with peers and managers created a number of issues related to efficiency and time to productivity. It is recommended that all sales staff are required to participate in the onboarding of new sales team members. Klein and Heuser (2015) describe the guide component of onboarding as the practices aimed at providing active, direct assistance to new hires, helping them navigate the transition to effective insider (p. 265). This can include various practices, from assigning buddies or mentors to a formal welcome coordinator who oversees the organization's onboarding and orientation process. The role of the guide dimension within the IWG framework is designed to supplement the new employee behaviors that support socialization, including information-seeking, feedback-seeking and relationship-building (Klein & Heuser, 2008). Although the organization does not directly control new employee behaviors, practices can be implemented, which maximize the effectiveness of proactive new employee behaviors.

To maximize proactive behaviors without burdening individual sales staff with over-scheduled calendars, three integration methods are suggested: (1) sales staff hosts orientation on a rotating schedule; (2) a new hire mentorship program is designed; and (3) sales staff host monthly learning sessions to support ongoing development.

Recommend 3a: Require sales staff to host orientation

The current orientation agenda is spread across three to four days, including multiple speakers with one constant facilitator to thread together the disparate segments. The current facilitator is Michael Mitchell, Vice President of Sales. As uncovered in the focus groups and interviews, Mr. Mitchell's role in facilitating the orientation results in multiple negative consequences. As a senior sales leader, this is not an ideal use of resource to dedicate four days a week multiple times per year. Also, given the nature of his role as a senior leader, it limits the level of risk taking and freedom of questions that new hires feel comfortable asking during the orientation programs. Breaking the orientation agenda into smaller segments that are hosted by sales staff, such as eight half-day programs, would allow for Mr. Mitchell to continue to engage in orienting practices without expending such significant time and energy solely on orientation. This would also open the opportunity for expanded network and relationship building for new hires, by increased exposure to team members during orientation.

Recommendation 3b: Formalize a new hire mentorship program

A significant discovery in socialization research is the importance of access to organizational insiders (Caldwell & Peters, 2018). The role of a mentor is an excellent way to formalize the access to organizational insiders who can provide answers to questions that employees may not feel comfortable asking managers. Mentors can also offer advice on job performance and expectations, as well as provide social support (Allen et al., 2006). According to Ostroff and Kozlowski (1993), newcomers who are assigned a mentor are more knowledgeable about the organization and its culture than those who are not assigned a formal mentor. The role of a new hire mentor or buddy is not required to be a significant investment of time for employees participating. The role of new hire mentor can be designed to include specific welcome practices and support throughout the ongoing socialization process as needed by the new employee.

Recommendation 3c: Develop monthly learning sessions and roundtables led by sales staff

Newcomers' ability to learn and apply socialization content on the job is increased through the learning principles developed by Gagné (Richey, 2000). A significant component of the knowledge an organization requires a newcomer to learn is embedded in individual employees (Argote & Ingram, 2000). By creating learning sessions and roundtables led by seasoned LearnBot sales staff, newcomers could simultaneously access critical embedded knowledge and further relationship-building. These sessions would also allow new hires to develop in-time learning solutions related to specific sales needs. Each sales team member could be assigned to a specific topic or timeline to present to other team members. This method provides the opportunity to actively engage sales staff in guiding new hires' onboarding practices while also filling a gap in the knowledge-sharing process.

Conclusion

As a leading provider of live, avatar-based simulations across the world and a renowned leader in immersive virtual reality (VR) training, LearnBot has come across issues maintaining a consistent onboarding program to acclimate new hires. This quality improvement research study reviewed their sales team onboarding practices and identified gaps in the orienting practices within the sales team. While it was suspected that these issues were related to the remote workforce, virtual environment, and multiple time zones, this study revealed that most challenges of the current onboarding program are instead based on foundational socialization practices.

Upon researching which factors prevent new hire productivity and which contribute to an effective virtual sales onboarding program, the researcher designed three recommendations to improve the new-hire experience. First, it is recommended that LearnBot create a sales-specific

Welcome Guide & Roadmap for New Hires and Managers to address findings related to isolation, networking, and the new hire ability to participate actively in onboarding practices. Second, that LearnBot integrate their virtual reality products into the onboarding practices and processes, which would increase psychological safety across the newcomer experience. The final recommendation is to incorporate sales staff throughout the acclimation process so that welcome tactics are regularly practiced and to increase network building and collaboration. Updating the onboarding program and orientation to follow evidence-based practices that increase socialization, LearnBot sales staff will meet productivity expectations more quickly. It is also likely that the recommended orienting tactics, specifically those related to the Welcome and Guide categories of the Inform Welcome Guide framework, will increase collaboration across vertical sales teams long-term beyond the new hire population.

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Appendix I

Outreach Communication Request

Greetings,

I am currently a doctoral candidate in Vanderbilt University's Doctor of Education in Leadership and Learning in Organizations. Beginning in our sixth term of study, we engage with an organization to complete a capstone project over the course of one year.

The purpose is to allow us, under faculty supervision, to use what we have learned to solve a problem of practice or to understand a phenomenon important to our partner organization. I would be interested in partnering with your organization on a challenge related to remote learning and/or diversity and inclusion.

During the engagement, I would use a model of evidence-based practice that requires me to gather various types of data to help understand what you need in your organization. For the issue you want examined, I will use several sources of information:

- What I have learned in my courses and my own professional experience
- Information about your organization and the context in which it operates from you and any data collected about the organization and its environment
- The perspectives of the key stakeholders of your organization
- Research literature

Throughout the process, I will conduct interviews and focus groups with representatives of your organization, as well as stakeholders that you believe important to addressing the problem. Any preexisting data or previously collected information that led the organization to believe there is an issue to be addressed will be incorporated (as appropriate). With your permission, I may conduct a survey to collect additional information that may help further define the issue and provide context.

Once the data collection process is complete, I will begin to develop an intervention or solution for the organization. All information will be synthesized into a proposal in the format of your preference (short proposal, paper, or presentation).

In the last phase of our collaboration, I will develop a program evaluation plan for you. Although you are not required to implement my proposal, I will commit to providing you with an evaluation plan for the project should you decide to utilize it. If you choose to implement my proposal, you will have a well vetted evaluation plan that will give you a means to assess its success. Again, I will present this information to you for feedback and make amendments to the final proposal as needed.

The entire project will be completed by the end of my ninth term (the end of my third and final year), roughly 15 months from now. The first four months will involve developing the scope of the project, setting research questions, and developing data collection instruments. Once the research is approved by the Institutional Review Board, we can schedule the data collection itself.

Similar to the role of a consultant, I hope to be able to help you understand a problem or issue in new ways, provide you with what the current research literature says about the problem or issue, and craft a solution or intervention customized for your organization.
In our initial conversations, we will make some decisions about whether you want your organization to be identified in my final paper which will be published in the Vanderbilt Library's Archives. Please be assured that my research plan will be evaluated and approved by Vanderbilt's Institutional Research Board, a group charged with protecting those who agree to participate in research at Vanderbilt. We take such protections of privacy and confidentiality very seriously.

I am especially grateful for your interest in being a part of this exciting, final experience of my doctoral education and look forward to answering any questions you may have about our potential collaboration.

Thank you for your consideration,

Kate Hayes Carhart

Doctor of Education Candidate
Peabody College, Vanderbilt University

Email: katie.hayes@vanderbilt.edu
Phone: 321-436-8009

Appendix II

Sample Orientation Agenda

Monday: WHAT ARE WE SELLING?

Time	Theme	Activities	Goal	Resources + Prework	Facilitator(s)
9:00	Welcome & Focus	Opening remarks, overview of plan for 2020-21.	Clarity on where we are going and how we are going to get there.	Series B Deck	Michael / Lillie
9:30	Org Design	Presentation and discussion of LearnBot new "Teams" structure for finding, landing, renewing and expanding customers. Review of values.	Clarity on roles, responsibilities, ROEs, performance metrics and accountability.	Dream Team Deck Organizational Values	Lillie/Michael
9:45	Product		Team understands what we are selling today and what's coming tomorrow.	- LearnBot overview video LearnBot Private Practice vs. LearnBot Social - LearnBot Product Explanation - Demo Deck	Arwen / Michael
10:30	Branding	LILLIE		- Watch a webinar - Website - Brand guidelines / Copy	Lillie
10:45	Competitor Analysis	Presentation on our competitors and communication practice for our value.	Communicate LearnBot's value prop in relation to other tools.	Competitor Analysis 2020 FAQ	Lillie / Michael
11:30	Lunch Break Day 1	CUSTOMER STORIES Customer Service/Onboarding Tax Comany (Arwen + Michael) Hotel Chain (Michael)	SDRs/BDDs can tell spoken client success stories with clarity and confidence.		Courtney - Tax Michael - Hotel
1:00 - 3:00	Experience Product	BDDs log into the portal to schedule and experience a simulation in ML3. Debrief.	Learners have a deeper understanding of how our product works.	Not relevant.	Michael

Tuesday: WHO BUYS LEARNBOT? HOW DO WE MEET THEM?

Time	Theme	Activities	Goal	Resources + Pre/Postwork	Facilitator(s)
9:00	Targeting	Who buys LearnBot? 1. Channels and Lead Rating 2. Buyer Personas 3. SDR Presentation on Horizontal / Verticals. 4. Developing an Account Plan	SDR/BDDs can qualify prospects quickly and target energy to high value leads.	1. Lead Rating Rules (slide) 2. Hot verticals post COVID 3. Developing territory / account plans & Tips and Tricks deck 4. Account Planning Deck	1.Lillie/Michael / Dawn 2. Lillie 3. Lillie/Jacob 4. Julia
10:00	Prospecting	1. Delivering key messages (give/get) 2. Handling objections 3. Writing Good Prospecting Emails Tips and Tricks 4. Managing your personal brand for selling LearnBot as a Trusted Advisor. 5. Prospecting Tips	SDRs and BDDs can make an effective cold call in their VOICE that incorporates our key messages and customer success/value.	- 60 second commercial - High Impact Call Sheet - Common Objections Sheet (To be created from FAQ) - Prospecting Primer	1. Lillie / Conner 2. Lillie / Conner 3. Lillie/Conner Email/Tips and tricks 4. Conner / Michael 5. Oscar
11:00	Lunch Break Day 2	Story Time - Diversity / Inclusion • Cell Phone Company - Michael • Finance - Oscar • Consulting Firm - Julia/Raheem	SDRs/BDDs can tell spoken client success stories with clarity, confidence within the context of a sales convo.		Oscar Michael Julia /Raheem
1:00	Application	Booth Simulation: BDDs/SDRs practice their 60 second pitch to an avatar in booth.	SDRs/BDDs can do an effective LearnBot elevator pitch.	Prework: BDDs / SDRs craft their elevator pitch before going into the simulator	Michael give feedback on the booth pitches.

Wednesday: WHAT'S OUR PLAYBOOK FOR DISCOVERY CALLS?

Time	Theme	Activities	Goals	Resources + Prework	Facilitator

8:30	Demo / First Meeting	1. Scheduling a demo 2. Delivering a demo 3. First Call Agenda / Give-Get framework	SDRs and BDDs can lead an effective first meeting and dig into higher order discovery questions.	Sales Playbook • Session Deck • Setting Up a Demo • Dirty Dozen Demos - First Call Framework - Qualifying Critical Use - Give-Gets by Stage - Spoken Success Stories - Buying Roadmap Qs - 3 Level Discover Qs. - Watch exemplar videos	1. Brittany / Dawn 2. Michael
10:30	Lunch Break Day 3	Story Time • Leadership • Alexie – Coffee House • Conner – Health Care			Michael Oscar
1:00 - 2:30	Application	Demo Presentation	BDDs can run a good discovery call		Alexie Rosie

Thursday: WHAT IS OUR PLAYBOOK FOR LANDING CUSTOMERS?

Time	**Theme**	**Activities**	**Goal**	**Resources + Prework**	**Facilitator**
9:00	First Meeting Follow Up	1. Review pricing 2. Generating proposal 3. Qualifying a Proposal 4. Stage Give - Gets 5. When to involve Ops/Finance	Everyone understands and commits to using our pricing and proposal templates.	- Second Mtg Deck - Pricing Deck - Pricing Calculator - Follow Up Email (temp) Sample Proposals	Michael / Alexie Dawn
10:00	Follow On Meetings	1. Follow On Mtg Agenda A. Check in on critical use case (application)	Everyone understands how to utilize the 3 part meeting	- First Mtg Follow Up Deck - Give-Gets by Stage	Michael / Alexie

		B. Check for other value pathways (other apps) C. Custom Demo? D. Demo Portal? E. Review Proposal F. Call to Action - Contracting	framework into follow up meetings.	- Custom Demos - Land and Expand Post Retreat: - BDDs build own custom deck, revise success & partnership slides	
11:00	Lunch Break Day 3	Story Time /Sales • Banking/Financial Firms • Sales Coaching • Healthcare			Oscar Alexie Michael
1:00 - 2:30	Application	Demo Discovery	BDDs can run a good discovery call		

Friday: LANDING & EXPANDING CUSTOMERS

Time	Theme	Activities	Goal	Resources + Prework	Facilitator
9:00	Procurement	1. Preso on LearnBot template and key terms 2. Tips and tricks from Alexie and Michael on how to accelerate this proccess.	BDDs and SDRs understand the most important aspects of our contract.	- Contracts Deck - MSA - SOW Template - SOW Table/Cal2b.Pilot SOW Template.docx (Make a Copy)c - Memo on IP for customers - ML3 Tech Test - Pro tips for Procurement	Dawn Michael +Alexie
9:30	Security	1. Preso of key features. 2. Best practices to accelerate 3. Handling FAQs	- SDRs and BDDs understand and can confidently answer basic Info/Sec questions.	All Security / Major Product Info is here	Kie
10:00	Landing	What do I need to know about how LearnBot executes our initial engagements? What can I do to make sure our engagements are successful?	BDDs and SDRs understand what makes for a successful engagement.	Presentation from 7/17/2020 New scenario design process. Bank Scenarios	Leyla + PMs + Dacie Kaufman

Appendix III

Interview and Focus Group Protocols

Research Questions:

Research Question 1: What are the current factors that prevent new hire productivity at LearnBot?
Research Question 2: What factors contribute to an effective virtual sales onboarding program?

Protocol:

- **Interviews**
  - Leaders and Senior BDDs recommended by Michael Mitchell. Interviews schedule through follow-up communication after participant confirmed interest and availability.
- **Focus Groups**
  - All new hires beginning from January 2021 invited to participate. Focus Groups will be schedule by Michael Mitchell, who will also provide the introduction and outline of research purpose.
- **Observation**
  - Observation of Orientation Programs facilitated by Michael Mitchell. An introduction of the researcher will be provided on Day 1 of programing. Reminders at the beginning of each day will be shared with participants regarding the researcher's role.

Introduction: Hello, my name is Kate Hayes Carhart. I am currently a doctoral candidate in Vanderbilt University's Doctor of Education in Leadership and Learning in Organizations. I appreciate you taking time out of your schedule to talk to me about your experience in the onboarding process at LearnBot. The information you share today will not be attributed to you and all comments will be shared at the aggregate level only. I am looking at themes and trends across these conversations and your contributions will help inform the future on orienting practices at LearnBot. Your participation is voluntary. The recording of this conversation will be used for transcription purposes only and will not be shared beyond the researcher.

Appendix IV

Communication of Request for Leadership Interviews

Team,

As many of you know, the Sales Team has been overhauling our sales onboarding process. We have engaged with Kate Carhart (CCd) who is conducting her dissertation on supporting a remote salesforce as part of a doctorate program on instructional design with Vanderbilt University. She would like to schedule interviews with each of you in the coming weeks.

Here is the focus:

- Sandy Wisneski, CRO: As the person who oversees the entire department your take on this endeavor is of obvious importance.
- Dawn Edison, Dir of Sales Ops: As the person responsible for Sales Enablement at LearnBot, your perspective is mission critical here.
- Brooke Hernandez, CLO: Your perspective on both how the training is set up from a design perspective and how/when we could be training the team better on the product as it relates to off-the-shelf content and scenario design will be key.
- Sabri 'Adil Fakhoury: you have already added so much value with your work on the LearnBot Product 101 landing page, etc. Your input on how BDDs get trained on the technical aspects of our product is essential.
- Danny Chan, Chief of Staff: We need your help in advising: (a) how BDDs are better prepared to step into their role in owning customer success and working with our customer success managers; and (b) how BDDs are being good collaborators across the organization.
- Janna Paterson, Head of People & Culture: Ensuring that the BDD onboarding training is reinforcing the values we are promoting for all staff.

Kate will be reaching out separately to each of you to schedule these interviews. Please let me know if you have questions.

Thanks in advance for your willingness to participate in this!

Michael Mitchell | VP of Sales
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YouTube Channel | LinkedIn | LearnBot Overview Video

Appendix V

Sample Stakeholder Analysis

Category	**Stakeholder Name**	**Power**	**Interest**	**Engagement Strategy**	**Notes**
Team					
Management & Leadership					
External Functions & Peers					
Clients					