

The onboarding process: a review

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Abstract

Purpose – Before the onset of the COVID-19 pandemic, most employees worked from their employers' offices, and new team members were integrated into their roles through standard onboarding procedures. However, in response to the pandemic, organizations quickly reestablished new remote onboarding strategies. As hybrid employment gains popularity, the onboarding process has been affected by the digital transformation (DT) phenomenon, and organizations must now implement remote strategies to onboard new employees.

Design/methodology/approach – In this context, by considering the major changes that happen in the field, the purpose of this article is to provide a literature review of the onboarding process (OP), using the context-interventions-mechanisms-outcomes framework.

Findings – The review identifies four mechanisms describing the complexity of the OP and the impact of DT: basic onboarding, advanced onboarding, integration of newcomers and remote onboarding.

Originality/value – The findings have implications for both HR professionals concerned with onboarding strategy, and researchers studying the OP.

Keywords Onboarding, Digital onboarding, Hybrid onboarding, CIMO

Paper type Literature review

Introduction

In any circumstances, starting a new job can be a challenging experience, as it involves learning the way the organization functions so the newcomer can adapt and feel comfortable in an unknown environment (Carlos and Muralles, 2021). Many organizations have specific practices they apply to facilitate the introduction of the new employee to the structure and culture of the working environment. The process of new employees joining and integrating into an organization is referred to as onboarding (Gregory *et al.*, 2022). One of the most cited definitions in the onboarding literature is provided by Bauer and Erdogan (2010) who assimilated onboarding with organizational socialization as the process through which new employees move from being organizational outsiders to becoming organizational insiders. But there are other approaches as well. For example, more recently, Carlos and Muralles (2021) defined onboarding as a broader term that encompasses orientation and socialization.

Onboarding involves introducing a newcomer to their role while providing them with an understanding of the company's values, goals, policies, processes and organizational culture



(Bauer and Erdogan, 2014; Caldwell and Peters, 2018). Although onboarding was first addressed in literature in the 1970s, when Maanen and Schein (1977) introduced the terms of organizational socialization, newcomers, insiders and outsiders, it is still a hot topic in the current reality when the workforce market faces new challenges. The purpose of onboarding is to ensure that the new employee can effectively participate in and contribute to the organization's success (Bauer, 2010; Caldwell and Peters, 2018; Gruman and Saks, 2011). The employee onboarding process is a vital aspect for organizations to guarantee that newcomers feel valued and equipped with the necessary tools to excel in their new positions (Kowtha, 2018). Furthermore, an efficient onboarding process that is optimized and, in some cases, partially automated, can result in a reduction of overall time spent, benefiting all parties involved (Korte *et al.*, 2015).

Onboarding has undergone significant changes in recent years, driven by both the COVID-19 pandemic and the ongoing digital transformation (DT) that is affecting all industries. Before the pandemic, onboarding typically took place with newcomers meeting their team, learning their responsibilities and getting a sense of the company culture. However, due to social distancing measures, remote onboarding became more frequent (Scott *et al.*, 2021). As a result, companies had to find new ways to connect with newcomers and ensure that they felt supported and integrated into their new roles. DT became in this case both the solution and the challenge.

DT of onboarding includes the use of digital tools and platforms to streamline the process of filling out paperwork, training and communication between the employer and the newcomer (Petrilli *et al.*, 2022). Remote onboarding can include portals where new employees can access information and training materials, electronic forms for completing paperwork and automated processes that can help speed up the overall process. The use of digital tools can improve efficiency, reduce errors and provide better overall experience for new employees, which can ultimately help to improve retention and productivity (Verma *et al.*, 2022), but a need to reevaluate and refocus on the increasing remote onboarding procedures is also revealed (Stewart *et al.*, 2021). Shufutinsky and Cox (2019) observed that employees who were dissatisfied with the onboarding procedure during the first three months were less productive or even quit within one year of hire. This concern is relevant to both on-site and remote onboarding (Moran, 2019). Recent shifts to remote work in many industries highlight the need to establish and execute systematic onboarding processes (Stewart *et al.*, 2021). The shift to remote onboarding not only affected how information was delivered but also by whom (e.g. via video rather than in-person) (Morrison-Smith and Ruiz, 2020; Rodeghero and Microsoft, 2021). In addition, the pandemic highlighted the importance of team building and social connection, as well as the need to socialize with a diverse group of people during the onboarding process (Brown, 2021; Rodeghero and Microsoft, 2021; Stewart *et al.*, 2021). To adapt to the situation, companies had to modify their onboarding procedures for new employees. This involved using video conferencing for virtual meetings with colleagues and supervisors to familiarize newcomers with the work environment in a nonphysical setting (Carlos and Muralles, 2021). Digital resources such as tutorial documents and videos were also provided to new employees, and online forms and surveys were used as digital tools to ensure an efficient onboarding process (Rodeghero *et al.*, 2021b). These changes resulted in a significant transformation of the onboarding process, with virtual meetings and online forms replacing traditional physical interactions (Carlos and Muralles, 2021). The new approach to onboarding comes with a series of challenges, Carlos and Muralles (2021) mention the lack of unseen and unspoken physical cues that can cumber the communication and the integration of the newcomer in the team.

In this context of major changes concerning the OP, but also considering the lack of a systematic analysis of the field, this article aims to provide a holistic understanding of the phenomenon, addressing the context in which onboarding takes place, the practices and the achieved results, and to observe how DT has changed it. Previous literature reviews on onboarding new employees lack a comprehensive analysis of the onboarding practices and the changes that emerged in this field in the last years. This study aims to fill this research gap and answer the following research questions:

- RQ1. What are the different forms of onboarding? and
- RQ2. How has DT affected OP?

To address this question, we adopted the context-interventions-mechanisms-outcomes (CIMO) framework, which is a design science methodology that enables the creation of new knowledge by conducting a systematic literature review (Denyer *et al.*, 2008; Halminen *et al.*, 2021), capable of explaining how in different contexts different solutions (interventions) lead to specific outcomes. These explanations are called mechanisms.

The paper further contains the following sections: the methodology used, the results of the CIMO analysis and the discussion and conclusions section.

The research methodology

This systemic review follows the recommendations by Tranfield *et al.* (2003) and comprises three stages:

- (1) planning, which includes identification of the research question;
- (2) searching for relevant literature and analysis (screening, extracting and coding); and
- (3) reporting, as described in Figure 1.

Following the recommendations by Torres-Carrión and Institute on Electrical and Engineers Torres-Carrión (2018), we started our search considering the two terms that describe the onboarding process: “organizational socialization” and “onboarding.”

Search

In January 2023, we performed searches on both the Web of Science and Scopus databases. The review process for this research was thorough and methodical. The objective was to

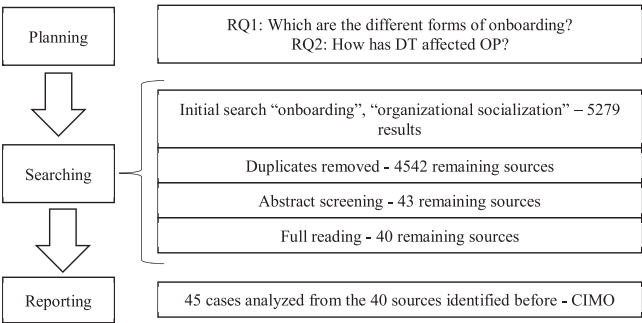


Figure 1.
Summary of the
research process

Source: Authors’ own work

select sources that would provide the most comprehensive and up-to-date information on the topic. The first step in the review process was identifying the most relevant and reliable sources.

Following the removal of the duplicate papers (5,279), we assessed the remaining 4,542 papers based on their titles and abstracts. We examined the abstracts of these papers for inclusion (sources that discuss cases of organizational socialization, onboarding and newcomers), as well as exclusion criteria (sources that focus on a different topic, or those that do not specifically address onboarding and socialization). As a result, we have identified 43 papers that were relevant to our research objectives. Subsequently, all 43 papers were read, and 40 of them were selected for further analysis and review.

Assessment of studies

We used the Critical Appraisal Skills Program (CASP) scale to analyze the validity, reliability and rigor of the studies included in our review, based on the work of [Dybå and Dingsøyr \(2008\)](#) and [Tursunbayeva et al. \(2017\)](#). CASP includes a list of eight quality criteria such as research objective, research design, sampling, data collection, data analysis, reflexivity, findings and research value. To establish the extent to which the papers can be valuable to the review process, two authors rated independently each criterion and noted with yes/no/not sure. For the papers marked “not sure,” a second round of reading was performed and a common appraisal was agreed.

Furthermore, we used the CIMO logic framework used in systemic literature reviews ([Costa et al., 2018](#)) to analyze the remaining 40 articles related to onboarding and newcomers’ integration resulting in 45 research instances, as some studies depicted more cases ([Britto et al., 2017](#)). By using this framework, we were able to generate prescriptive knowledge on how specific interventions (I) lead to various outcomes (O) within different contexts (C), where the mechanisms (M) represent the interpretation of the relationships between context, intervention and outcome.

Results

Considering the 40 sources, all published in journals indexed in Web of Science or Scopus databases between 1994 and 2022, 12 of these articles were published between 2015 and 2022, and are within the employment context of remote work, most of them focusing on recent years (except [Ahuja and Galvin, 2003](#)). The remaining 28 articles exploring the context of offline contexts were published between 2002 and 2020, with one of them dating back to 1994 ([Dutton et al., 1994](#)). This analysis reveals the emergence of the digitally transformed onboarding process.

Context-interventions-mechanisms-outcomes analysis

In the following section, we detail the results concerning context, intervention and outcomes associated with the onboarding process identified in each study. For the context, the analysis was made regarding within the described cases whether the onboarding process has been made on-site or remotely, for the Intervention analysis we have reviewed and grouped the different practices that altogether represent the onboarding process, while for the outcomes we have analyzed the results of the onboarding process.

Context

In the CIMO framework of research, we split the context into on-site work and remote work, but we also have cases in which a combination of the two is described ([Britto et al., 2017](#),

2020). The COVID-19 pandemic has played a major role in driving interest in remote work research (Petrilli *et al.*, 2022; Rodeghero *et al.*, 2021b). With many organizations forced to implement remote work policies to comply with social distancing guidelines and keep employees safe, there has been a heightened interest in understanding the challenges and benefits of remote work. With the rise of communication tools like video conferencing and instant messaging, it has become easier for remote teams to collaborate effectively and stay connected (Miller *et al.*, 2021; Rodeghero *et al.*, 2021a, 2021b). This has led to a greater interest in understanding the dynamics of remote work and how to manage remote teams for optimal productivity and success (Britto *et al.*, 2020).

On-site work

Out of a total of 28 articles within the context of on-site work, five were conducted in software/technology domain operating companies (Bauer *et al.*, 2021; Cho and Huang, 2012; Ellis *et al.*, 2015; Ellis *et al.*, 2017; Korte *et al.*, 2015; Nifadkar and Bauer, 2016), while the rest were conducted within various other sectors.

Remote work

All 12 articles within the context of remote work, were conducted in software/technology domain operating companies. Reasons for this trend include the increased demand for software, improved access to technology and the growth of tech startups (Britto *et al.*, 2020; Petrilli *et al.*, 2022; Sharma and Stol, 2020). As mentioned, we also identified case studies in which remote onboarding is mixed with onsite one, particularly in two global teams in Ericson located in Sweden and India (Britto *et al.*, 2017, 2020).

Intervention

In the mentioned contexts, we have identified in the analyzed cases the following types of interventions, revealing the way organizations approach and design the onboarding process.

Onboarding formal programs and practices refer to the process of designing and executing a formalized orientation process for new employees that helps them to become acclimated to their new work environment and to be successful in their roles (Britto *et al.*, 2017, 2020; Liu *et al.*, 2018; Rodeghero and Microsoft, 2021; Sharma and Stol, 2020). This intervention reveals a focus on formalized activities designed to properly include newcomers in organizations.

Organizational socialization activities contain more activities that help new employees to adjust to and become integrated into their new work environment (Cho and Huang, 2012; Dutton *et al.*, 1994; Taormina, 2009), the focus being here on improved socialization. Perceived organizational support (POS) plays a critical role in the relationship between socialization tactics and socialization outcomes. Under low POS conditions, socialization tactics have a positive relationship with socialization outcomes.

Employee engagement and retention activities refer to implementing activities that increase the level of commitment and motivation that employees have toward their work and the organization they work for. Commitment relates negatively to withdrawal cognition and turnover, which play an important role in employee retention (Meyer *et al.*, 2002).

Proactive behaviour-related activities were also found in the examined sources, this behaviour being viewed by their managers as their commitment to adjust (Ellis *et al.*, 2017). The study performed by Milanov and Shepherd (2013) shows that the reputation of a newcomer's first partners positively influences the newcomer's future status over and above more proximate network conditions in an on-site work context in a panel of 272 venture capital firms.

Adjustment of the expectations and experiences of newcomers refers to the process by which individuals who have recently joined a new organization, community, or culture modify their beliefs, attitudes and behaviours to align with the norms and expectations of the new environment (Ahuja and Galvin, 2003; Bauer *et al.*, 2021; Steinmacher *et al.*, 2015).

Outcomes

In our analysis concerning outcomes, we have operationalized these outcomes based on the interventions in terms of benefits associated with onboarding in the four categories: increased organizational commitment, increased employee engagement and retention, effective onboarding and increased organizational success and improvement in new employees' experience.

Improvement in new employees' experience is by far the most frequently encountered outcome present in 21 out of the 40 articles we examined. When adjusting the expectations and experiences of newcomers, companies see an improvement in employees' experience accordingly (Ahuja and Galvin, 2003; Bauer *et al.*, 2021; Bauer and Erdogan, 2014; Korte *et al.*, 2015; Nifadkar and Bauer, 2016; Simon *et al.*, 2019; Steinmacher *et al.*, 2015). This outcome is achieved both in on- and off-site contexts when facilitating organizational socialization (Perrot *et al.*, 2014; Tomprou and Lee, 2022), and by implementing onboarding programs and practices (Caldwell and Peters, 2018; Heimburger *et al.*, 2020; Petrilli *et al.*, 2022; Rodeghero *et al.*, 2021b).

Increased organizational commitment is the second most frequently mentioned outcome, present in 12 papers, indicating that effective socialization tactics and information-seeking can lead to an increased adjustment in the context of on-site work which in turn leads to higher levels of organizational commitment (Bauer *et al.*, 2007; Ellis *et al.*, 2015).

Increased employee engagement and retention tends to be a less frequent outcome, mentioned by only six studies. Facilitating organizational socialization, proactive behavior and the evaluation of newcomers are all interventions that can lead to increased employee engagement and retention.

Effective onboarding and increased organizational success is the most complex outcome and hence the least popular one, present in only five studies. To ensure effective onboarding the onboarding strategy must be well planned and consider the sociocultural background of the newcomers.

Negative outcomes

Besides these positive and desired outcomes, we also identified some negative ones. A poor fit between formal training and newcomers' expectations can result in new employees lacking the necessary knowledge before starting their actual work. This was observed in a case study on Ericsson in Sweden, where mismatched training led to incomplete preparedness among newcomers (Britto *et al.*, 2020).

Mechanisms

The main contribution of our literature review, generated by considering the CIMO framework, is the explanatory mechanisms of onboarding newcomers in organizations. The mechanisms are interpretations of the authors based on analyzing the contexts, interventions and outcomes. The focus here is to identify logical explanations (mechanisms) on how specific contexts are linked to specific interventions and specific outcomes.

After analyzing the research articles using the CIMO framework, we have identified four mechanisms. Three of these mechanisms pertain to on-site context, while the fourth pertains to remote-work context. The fourth mechanism is associated with how the COVID-19

pandemic has caused a shift from traditional onboarding toward digital onboarding and accelerated its adoption.

Basic onboarding

This mechanism includes the procedures and guidelines that companies implement to ensure that newcomers are introduced successfully to their roles, teams and organizations. The outcomes from this mechanism can be effective onboarding and increased organizational success (Sanchez *et al.*, 2020), improvement in new employee experience (Caldwell and Peters, 2018), increased organizational commitment (Becker and Bish, 2021; Cable *et al.*, 2013; Corbin, 2020; Depura and Garg, 2012; Klein *et al.*, 2015) and increased employee engagement and retention (Gupta *et al.*, 2018; Solinger *et al.*, 2013).

Advanced onboarding

This mechanism refers to employees' emotional attachment and loyalty to their organization. Organizational commitment is influenced by factors such as employee job satisfaction, perceived fairness in the workplace and opportunities for professional development. Effective onboarding programs can positively influence organizational commitment by providing a positive initial experience for new employees. The outcomes from this mechanism can be improvement in new employee experience (Perrot *et al.*, 2014), increased organizational commitment (Bauer *et al.*, 2007; Dutton *et al.*, 1994; Ellis *et al.*, 2015; Hartman and Barber, 2020; Meyer *et al.*, 2002; Taormina, 2009) and increased employee engagement and retention (Cho and Huang, 2012; Kotlyar, 2018; Meyer *et al.*, 2002; Perrot *et al.*, 2014; Selden and Sowa, 2015).

Integration of newcomers

This mechanism refers to the process by which newcomers become integrated into their new work environment. This process can be challenging for newcomers, as they must navigate new social and work-related expectations. The outcome of this mechanism can be an improvement in the newcomers' experience (Bauer and Erdogan, 2014; Bauer *et al.*, 2019; Ellis *et al.*, 2017; Korte *et al.*, 2015; Milanov and Shepherd, 2013; Nifadkar and Bauer, 2016; Simon *et al.*, 2019).

Remote onboarding

This mechanism refers to the shift from in-person onboarding to remote onboarding, which became necessary due to the pandemic and has become increasingly common due to the rise of remote work (Hemphill and Begel, 2011; Scott *et al.*, 2021). Remote onboarding involves using digital tools and technologies to facilitate the onboarding process, such as video conferencing, virtual tours of the workplace and online training modules (Petrilli *et al.*, 2022; Rodeghero *et al.*, 2021b).

Discussion and conclusions

Overall, onboarding has evolved significantly over time and continues to evolve as companies strive to provide newcomers with a comprehensive and meaningful onboarding experience. Companies now recognize the importance of providing newcomers with detailed information, ongoing support and personalized experiences to ensure they succeed (Perrot *et al.*, 2014). Our results reveal that the onboarding process includes different specific activities from formal programs and practices to activities which focus more on the

relationships newcomers build within the organization, to their proactive behaviour and their retention.

In recent years, there has been a significant increase in the number of companies offering remote work options to their employees. The COVID-19 pandemic in 2020 played a major role in accelerating the shift toward remote work, as many companies adopted remote work as a necessary measure to prevent the spread of the virus. As a result, many companies have since decided to continue offering remote work options even after the pandemic is over.

The main theoretical contribution of our literature review, generated by considering the CIMO framework, is the identification of the explanatory mechanisms of the onboarding process (basic, advanced, integration and remote). These mechanisms reveal that the new remote OP is rather a distinct form from the previously existing ones, reshaping the practice of the onboarding process. However, this mechanism could be considered as an emerging one, because the focus is currently on the adoption of remote technologies to facilitate OP instead of focusing on better outcomes in comparison to the OP traditional forms. For practitioners, our review provides the best practices reference concerning their OP. Considering the four identified mechanisms, they can estimate the complexity of their current OP and establish plans for passing to the next level. A major concern for both theoreticians and practitioners for the future is identifying ways in which remote and on-site onboarding should be combined to generate the best outcomes that fit both the needs of the employer and the newcomers.

The limitations we identified in our study are rooted in focusing solely on two databases, Web of Science and Scopus. Future research could expand to all relevant databases and identify areas where companies are falling short in terms of their use of technology in the onboarding process. For example, it may highlight companies that have not yet fully embraced automation in their onboarding processes, or those that are not using data analytics to track the effectiveness of their onboarding programs. Furthermore, future research could include more quantitative research on the onboarding process as most of the studies identified in our sample use qualitative research methods.

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