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Learning Solutions

Helping you develop the organization of your dreams.

Train: Don't on-board, socialize!

Why a socialization process is imperative for employee and organizational success – an Archetype Learning Solutions proprietary toolkit

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"If you don't have a structured socialization plan in place, one isn't likely to develop on its own, and if it does its not likely one you want."

INTRODUCTION

Your new hire will make a stay or go decision within the first three-days. Perhaps even worse than a physical turnover is an apathetic team member who stays and does little if no work. While its easy to measure the cost of physical turnover, which can be as much as three-times the annual salary of the replacement, its not as easy to measure the cost of apathy or even sabotage.

For too long, the burden of on-boarding has been placed in the hands of the supervisor and the employee. HR plays a key role in the recruitment process, legal requirements, and orientation, but what happens after that? Employees are frequently left to figure it out on their own. This individual method has been called an isolating experience, leaving new team members to figure it out on their own, while often being "held accountable" for unknown missteps.

Organizational socialization provides a different approach that makes assimilation a partnership between the employer and employee, thereby ensuring success through a thoughtful methodology based on what the employee needs. Socialization measures the needs of new team members in three areas: industry context, organizational content, and organizational culture.

If you're an HR or OD professional seeking a new a better way to engage with your team members from day one, consider a structured socialization approach. Archetype Learning Solutions has developed a unique, one-of-a-kind tool to help everyone succeed.

PRODUCT/SERVICE/METHODOLOGY

The socialization framework journey was the result of my dissertation, exploring the universal dissatisfaction of nurses. Socialization provides a more thoughtful approach to traditional on-boarding and is known to increase job satisfaction by providing a structured process in which new team members can more easily and effectively assimilate knew knowledge and organizational nuances. Role stress, known to be a significant contributor to dissatisfaction, is reduced, while overall organizational commitment is increased.

Initial research used a qualitative, interview approach to understand some of the challenges facing nurses. Now, this work has produced an assessment tool that can be used by any organization to identify gaps in new team member experiences from the macro-environment or industry context, the micro-environment or organizational content, and the overall organizational culture – or those unwritten things that determine our success or failure.

Research included 20 nurses from career-entry to 30 plus years, has now extended into the larger environment and an additional 16 years of research that includes physicians and the City of Seattle (HSD). The facts remain: a structured and thoughtful process ensures a much more committed team member, who puts the success of the organization first.

Sadly, too many in our modern organizations do withhold information. Moreover, many team members simply will not take on the extra burden of showing people the ropes. This was clearly the case in nursing and has shown to be true in most other professions. Whether it's the result of an increasing work load,

lack of a committed team, or the inability to recognize that success is a responsibility of everyone, many new team members are expressing a sense of abandonment.

This research, and the support for better on-boarding, has continued. In 2016 I conducted research with physicians in their transition from clinician to leader. In 2024, I conducted six focus groups of employees with the City of Seattle, Human Services Division. The findings have remained consistent over time. Employees who had an active, supportive member –regardless of that role—had a far greater positive and supportive experience. They experienced less role stress, had far more clarity about their position, and felt socially included – a part of the team from the beginning.

Overtime, we've developed a complete toolkit to assess the specific needs of your new team members and provide a more inclusive, social experience.

KEY FINDINGS

Key Findings #1

"Staff was not supportive or caring, no one was there to help me. It was a tremendous personal liability"

A lack of adequate knowledge transfer was prevalent among veteran nurses. It was reported by participants that they would stand around and watch as novice nurses or new team members struggled to find information or tools necessary to do the job or perform their role.

This has been shown to exist in multiple industries. Philip reported that the individual who had his previous role, refused to meet with him or spend anytime showing him important information.

Key Findings #2

"A manager in an entirely different department took on Sue's work, while tossing her meaningless tasks. Her manager did nothing to correct the situation"

Role stress was consistent in nursing, contributing to anxiety and a reduction in critical thinking. Participants consistently reported that role stress among the study sample was high, leaving them confused and conflicted about the role.

Outside of nursing, many new hires report a lack of structured processes, which contributed to constant conflict and fighting over who got to do what. Physicians experienced role stress through the lack of

developed job description of what it meant to be a Chief Medical Officer. Their expertise was questioned in relation to their new role, all while learning the language of business. Worse, an assumption that because they are physicians, this work will somehow come easily to them. This is woefully incorrect, as it places even more stress on them, as they navigate leadership theory with reality. Many physician-cum-leaders indicate that the executive seat is a lonely role. Others expressed regret in leaving the clinician role behind, stating that they never really felt like they fit into the business seat.

Key Findings #3

"As a new nurse, I was fortunate to be mentored by a few nurses, it was helpful for me to feel successful"

Mentoring is the key to success. Results of the study confirmed that solid mentoring, an important part of effective socialization, was the key to new member assimilation. Mentoring reduces dissonant expectations, while increasing both job satisfaction and organizational commitment. The role of mentors alleviates the loneliness of entering a busy organization as well as assisting with organizational integration. This is especially true of junior or new members in any organization or role.

As it relates to transitioning physicians, 100% of the participants indicated that a peer mentor, role model, or coach was key to their success in transitioning into a non-clinical role.

Participants who had access to such resources were better able to navigate the complexities of the executive table and leadership conduct. Many expressed that they were left to figure it out on their own. Still others indicated that they paid out-of-pocket for a personal leadership coach.   A non-supportive environment has been highly correlated with role stress and burn out that occurs with inadequate development.

Consider the differences in competencies between physicians and traditional business-leaders:

The previous finding referenced the need for time, perhaps even more time to develop than their business counterparts could be in the varying competencies between business- and physician-leaders.

Physicians	Organizational leaders
Autonomous decision makers	Collaborative decision makers
Reactive problem solvers	Proactive problem solvers
Focus on detail	Focus on the system
Analytical – linear thinkers	Creative – intuitive thinkers'
Little tolerance for ambiguity	High tolerance for ambiguity
Patient - centered	Organization/strategic - centered

Navigating these changes requires a very high degree of the content aspect of socialization, which also requires time. Learning, unlike training, requires time. The need for time to learn new ways of thinking and doing things was a significant finding.

Among the City of Seattle members, developmental mentoring was mentioned as key to success was mentioned 16 times among the 26 participants as a crucial piece of understanding their role (both content and context).

> "My supervisor gave me time to get familiar with the specifics of the job, and coordinated training and shadowing with colleagues. I know I can still count on these people as I continue to learn"

Key findings #4

> *"Suddenly I am interacting with these people in a completely different way. You have to learn pretty fast, you don't get 20 years to learn it. I had 25 years of a gradual learning curve, I didn't have 25 years of innate subtleties of what to do or not to do."*

Time to learn
Developmental time, a luxury afforded to few, was a repeated expression with 60 occurrences and 97 specific references from 100% of the physician sample.

Physicians spent years honing their skills; many began as early as high school. Time was the very thing that made them great clinicians. As it relates to physicians, one of the biggest assumptions was that the nature of their IQ makes them impervious to adult learning needs.

Key findings #5

> *"Felt very welcomed on my first day. We had a team lunch prior to NEO. I got to know them before starting the actual work. Even before joining the team my supervisor asked me to share my bio."*

Relationships matter
The "social" or cultural aspects of intentional socialization have also had a significant impact on new team member experiences. This was a particularly impressed upon topic with the City of Seattle team members, mentioned 35 times. This could be a function of the temperament of individuals attracted to social services type of work, but nurses and physicians have expressed similar themes.

Physicians expressed this as a loss of collegial and professional relationships among their physician peers.

> *"Once you give up clinical practice, the residents [physicians] wouldn't even talk to you – they look away and don't even acknowledge you."*

Visual Data

Participant	Prior expectations	Socialization experience	Unmet expectations	Role Dissatisfaction
Sharon	No	Positive	No	No
Sarah	No	Positive	No	No
Jack	No	Positive	No	no
Tami	No	Positive	No	no
Linda	No	Positive	No	No
Tracy	No	Positive	No	No
Mindy	Yes	Positive	No	no
Marla	Yes	Positive	No	No
Nancy	Yes	Positive	No	no
Dena	Yes	Positive	No	no
Jennifer	No	Positive	No	Yes
Robyn	Yes	Positive	No	Yes
Monica	No	Negative	Yes	Yes
Peggy	No	Negative	Yes	Yes
Susan	No	Negative	Yes	Yes
Kim	Yes	Negative	Yes	Yes
Elizabeth	Yes	Negative	Yes	Yes
Carole	Yes	Negative	Yes	Yes
Angie	Yes	Negative	Yes	Yes
Darla	Yes	Negative	Yes	Yes

Of the 20 nurses, the nine, or 45%, nurses who indicated they had a negative socialization also indicated dissatisfaction with the role overall.

1. Prior expectations were identified from either experience or expectations established as part of nursing education.
2. Some indicated that they had some negative experiences as part of their socialization process, but viewed it as positive overall.
3. All names have been changed as per research and ethical standards

From the chart above, it is easy to see that a negative assimilation process contributes to unmet expectations, role stress, and overall dissatisfaction. Most interesting in this finding is that even with previous experience, inadequate assimilation led to dissatisfaction among the sample. This is important because we often make an assumption that team members with prior experience do not require the same socialization practices.

Of the 16 physicians, the need for mentors, peer support, or coaches was a significant, mentioned by 100% of the sample. The focus groups of 26 from the City of Seattle, strongly related a positive socialization experience with the ability to be very clear about the work (content) as well as the social (culture) elements of satisfaction overall.

What's included?

Socialization is a highly effective retention and engagement strategy. Through this inclusive process new team members receive the information they need in a structured manner that provides them with the information and expectations that allows them to function in a system of which they most likely do not have any knowledge. The Archetype Learning Solutions socialization package is a complete solution for ensuring the effective socialization of your new hires. Successfully socialized team members are far more likely to have a higher commitment to your organization.

Socialization covers three key elements of your organization context, content, and culture.

Context

Your organization functions in a unique macro-environment. Be it manufacturing, healthcare, or hospitality, there are specific regulations and requirements that all team members need to be aware of to make organizationally beneficial decisions.

Content

The content most often refers to the policies/procedures and organizational history. Often overlooked these are the "cultural characteristics" that make up the organization as a whole.

Culture

Organizational culture refers to associated behaviors and expectations, values, and the overall, "it's just the way we do things around here" statement. This is also helpful in establishing professional relationships early on, which can make a significant in overall engagement.

We provide a socialization toolkit that includes:

1. Organizational traditional or adaptive system assessment: Begin by understanding your own organization and tolerance for ambiguity and creativity (adaptive) or if it's a traditional system. This will help you understand how structured, or unstructured, your socialization process needs to be.
2. A new-hire socialization-needs assessment: This is a quick, employee completed assessment to determine which of the three areas your new team member needs in order to function at their highest level, and get up to speed more quickly. This also includes best-practices in the areas of context, content, and culture. This ensures that you are developing a socialization process that is unique to each new hire.
3. "About Me" PowerPoint posters: to ensure that your current team members are quickly introduced to new hires. This helps to quickly establish relationships based on commonalities.
4. A "welcome" letter: This is a quick letter to acknowledge new members as well as provide a reminder about the organization's mission, core values, some key behavioral expectations, and a *Recognition Recipe* card.
5. Three-, 30-, and 90-day check in tools: Research has demonstrated that your new-hire will make a stay or go decision within the first three days of hire! Research also shows that identifying and meeting new hire needs quickly sends a strong message of support to everyone.
6. An organizational introduction field guide: This tool allows you to customize the significant operational areas, identifying the key players, their role in the organization allowing new team members to not only meet key members but make important connections to their own work.

We can also provide training, mentoring best-practices, and change management to ensure that your organization understands the power of socialization!

The toolkit
A complete set of socialization tools, all available for white label.

1. Organizational assessment: traditional or adaptive

Are you in a traditional or adaptive organization? Does it matter? For socialization purposes it does. Completing the assessment will give you a better understanding of your own organizational needs as it relates to bringing on new team members. This may also aid in your recruitment practices as well!

Hard-copy form

2. New hire socialization assessment and best practices

Get the best understanding of your new team member needs through our socialization assessment. Prepare a customized plan with known best-practices to ensure they get the right information from the right person at the right time.

Hard-copy form

3. About Me posters

There really is no better way to get to know new team members than with an *About Me* poster. Share widely with the existing team to make immediate connections. There are five posters each contains a placeholder for your logo.

*Electronic form for customization*

4. Welcome letter

Most new team members have told us that there was not only a general lack of expectations from day one, but no real sense of excitement about their addition to the team. And, because recognition is key, our *Recognition Recipe* cards are included! Ensure that you can Recognize Right from day one. This is also key to great engagement.

Electronic form for customization

5. 3-, 30-, & 90-day check in toolkit

Get a better sense of what your new team members are experiencing. A copy for your managers and new team members for complete transparency.
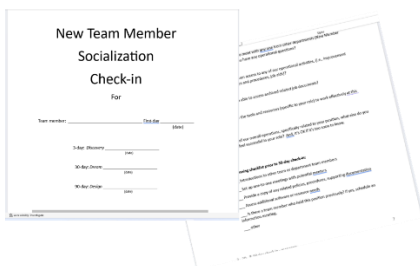
Hard-copy form

6. New Team member introduction field guide

Facilitate greater engagement between new and existing team members with the field guide. This tool ensures that new team members are quickly introduced to key functions, initiatives, roles, and other team members to make immediate personal and operational connections.

Electronic form for customization

A tale of two experiences
Your new hire is entering a system of which they have no knowledge...

Employee: Philip's story	Business owner: Andy's story
Philip had close to 40 years of experience in his field. Hired into a position he was well-qualified and well-prepared for, yet the environment was very different. Despite his years of experience, there were still several unknowns: - The industry (context) was different. As such different regulatory requirements, etc., - The position (content), while similar, had unique elements like proprietary software, documents, different processes, etc., - The environment (culture) was toxic with a great deal of apathy. His new hire experience was limited to a series of videos to watch prior to starting. On day one, he was isolated in an office with no introduction to team members, knowledge transfer, or tools to conduct his work. Even the individual in the previous role has not had any contact with him. Further, a different manager is directing his work, and he has not had any meetings with his own direct supervisor. At four months into his role, he does not feel that he has been set up to be successful in his position or within the organization. Like most within the organization, he has very little engagement.	Andy began his small business two years ago. The last several months have been very profitable for his start up, but an unseen event brought operations to a halt, therefore his revenue. Like many, Andy's experience of bringing on new team members was limited to his previous employment experience. As such, he was not aware that there was a different way. As a business owner, he used the Archetype Socialization documents and processes (as well as the Archetype Leadership Learning series) putting an emphasis on the team member relationship above all else. At the time of the revenue disruption, Andy discussed the challenges with his small team. He was very transparent and open about the situation, confessing that he would not be able to make payroll. His team rallied around him and the business stating that the relationship that Andy had fostered with the team, his empathetic leadership approach, and his authenticity was nothing like they had ever experienced and would remain with him as long as they could.

Ensure that your team members are committed to your organization, your vision, and your goals. Set them up for success and a great business relationship from day one!

Conclusion

"Its not about knowing what to do , its about knowing how to do it, in a system in which your new team members has no knowledge"

While many of these results were the conclusion of 20 nurses, results such as this are frequently generalized to other populations who experience similar conditions. While nursing has been known to be an emotionally and mentally cruel career, there are other careers that experience similar conditions. If effective organizational socialization can assist in a career known to be difficult, imagine how it can transform the experience in environments that are less stressful. That said, stress exists in all aspects of our busy world, easing the way for any new team member can provide increased opportunities for them to operate far more effectively in a reduced amount of time.

There is a better way. Let Archetype learning Solutions provide you with a tool to socialize right! We have a tool that measures team members' exposure to and knowledge of the industry context, the organizational content, and the organizational culture that addresses the key findings from the research. In addition, we provide developmental best practices to ensure your new team members are successful.

Key Takeaways
- Provide effective mentors, even for team members with previous experience.
- Leaders must take an active role in ensuring success of all team members, especially new hires.
- Be aware of bad organizational citizenship. Sadly, it does exist.
- Take an active role in the socialization of your new team members to ensure they are set up for success!

Check out our other *Train* white papers to ensure your team learns together:
- Begin from Within - Leadership development foundations
- Shared Leadership – Learning to lead

You can also find a copy of my research *Perspectives on Socialization* on our website.