**Client:**

**Technology Service Professionals, Inc.**

**1850 N Greenville Ave Suite 157**

**Richardson, TX 75081**

**Technology Service Professional, Inc. Consulting Project**

Team 5: Daisy Cisneros, Christina Horton, Angie McCormick, Rob Sepeda, and Arohi Vyas

Educational Human Resource Department, Texas A&M University

EHRD 625, Organization Development & Performance in HRD

Dr. Michael Beyerlein

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# Executive Summary

The purpose of the case study is to evaluate an organization that has been awarded multiple customer-endorsed awards for their customizable IT solutions approach. Having chosen Technology Service Professionals (TSP), Inc.’s new hire onboarding training program, this evaluation will enable us to see an HR department’s structure, scope, and influence in action. We aim to gain insight through strategic analysis to provide good feedback to TSP, Inc. This feedback, in the form of a presentation, will allow TSP, Inc. to better align its onboarding program with the company’s working values. TSP, Inc. does not manufacture products or sell software; its products are its personnel. This feature makes the HR department’s role of paramount importance to the company’s overall success. The scope of work included interviewing the organization’s Senior Training Specialist Shawn Foster and surveying the organization’s leadership team to examine the current onboarding training practices. The recommendations outlined in the report will aid TSP, Inc. in increasing employee engagement and enhancing communications and collaboration within the leadership team.

# Introduction

A team of five graduate students attending Texas A&M University (TAMU) participated in a semester-long project for EHRD 625 Organizational Development and Performance in Human Resources Development. The team is a diverse group of individuals with different levels of experience which makes this group unique and well-suited to conduct the evaluations of TSP’s Onboarding Training Program. One member of the team Rob Sepeda who works at Technology Service Professionals with over two decades of Human Resources experience ranging from government and corporate experience. The other team members' experience range from non-profit organizations to working professionals in the academic world.

**Overview of the Company**

The two owners worked together for years at Honeywell’s Computer Support branch before Technology Service Professionals was founded. Then, Honeywell decided to downsize and disband the Computer Support branch leaving Frank Gonzales and Rick Skaggs an opportunity to start their own company. In 2002, Frank and Rick decided to take on the daring risk of forming TSP with nothing more than $500 worth of supplies, two employees, and one room to operate. The business strategy: to build on the combined years of industry experiences, add a human touch to the business, and innovate through people development and culture.

TSP was founded on the belief that people would be the heart and soul of driving them to success. After 20 years of business, “Our Product is Our People” still is the founding principle that provides their customers with exceptional IT services. The owner’s philosophy of nurturing relationships has led to the organization receiving many awards such Dallas, Texas Top Choice Award for the past three years and recently nominated for the 2022 Top Choice Award for the fourth year in a row. TSP also recognized one of the best entrepreneurial companies in American by Entreprenuer Magazine.

**The Assessment**

Team five set out to evaluate TSP’s Onboarding Training Program with the goal of conducting interviews and surveying the client’s employees. Team Five’s scope of work is to examine the current onboarding training practices, identify strengths and weaknesses of the program, provide recommendations to enhance the program, and develop strategies for implementation. TSP’s Onboarding Training Program for newly hired IT Engineers was designed to meet the organization’s business strategy in delivery the best IT solutions and workforce solutions to support there customers. Having chosen TSP, Inc.'s new hire onboarding program, this case study allowed us to see the structure, scope, and influence of an HR department in action to strengthen our understanding of how real-world situations along with the combination of academic learning can have a positive impact our understanding of the course materials learned throughout the semester.

To achieve this goal, our team utilized various theoretical models to implement the project to derive valuable insights for our client. The core principles of our project implementation process was based on Systems Theory, which focuses on the arrangement of and relationships between parts and how they work together as a whole (Ansari, 2004 as cited in Sullivan et al., 2013). The data collected was analyzed using McKinsey’s 7s model which is a holistic approach that considers seven aspects of any organization to understand gaps, teams, processes, and implement change management strategies (Sullivan et al., 2013). The results and recommendations in this report should highlight the strengths and weaknesses of the onboarding training program that offers TSP’s Training Specialist and the leadership team the ability to enhance the program's effectiveness and readiness to adapt to change.

# Framework

In choosing TSP for this project, it is important to note that they do not manufacture products or sell software; instead, their motto is “the company’s products are its people”. TSP believes that by training its people, regardless of years of experience, with the proper training and development program, we can continue to be a top service IT service provider in the industry. Therefore, it is clear that they recognize the value of properly training, continually supporting, and maintaining a workplace culture that allows employees to thrive. This company is hired by other organizations within the United States and Canada to create customized IT systems and workplace solutions affecting efficiency and productivity (*Home - TSP - IT services and Workforce Solutions* 2022).

TSP has a Training Center in Richardson, Texas, yet its employees reside throughout the United States. The distance among the team members has the potential to prove challenging in regard to communication and employee culture. As with most organizations, new hires must complete employee onboarding training. But why is onboarding training necessary? Why do organizations value the time and resources spent in completing training during a new team member’s early moments within a new company? And even more so, what information should be prioritized when developing an onboarding training system?

Data supports that employees are more productive when they work at high-trust organizations and are significantly more willing to collaborate when they have a sense of belonging. Alignment with company values aids in team members feeling a sense of connection to the organization’s mission and goals. This is especially true in the onboarding program as it provides the foundation for the employee’s knowledge, feelings, and sense of belonging with their new company (Keswin, 2022). Systems Theory focuses on the relationship between parts and how they work together (Ansari, 2004 as cited in Sullivan et al., 2013). It states that systems are unrestricted and interact with each other and what is around them. Because of this, there are continual changes, growth, adaption, and improvements made (Heylighen and Josyln, 1992 as cited in Sullivan et al., 2013). “Systems theory provides a framework for classifying and evaluating change in organizational settings. It is an interdisciplinary study that fuses multiple disciplines into a coherent body of theory and practice” (Sullivan et al., 2013). While different staff members have various job duties, departments overlap, and most times a level of cohesion is mandatory. Utilizing this theory with respect to evaluating TSP’s onboarding program allows multiple perspectives to be reviewed - both the managers and the participants completing the training - and how they are related to one another. With no portion of TSP isolated, every department, and every team member has some way of being integrated with others. It also allows for different teams to become familiar with the same information structured strategically to reinforce TSP’s values, organizational structure, systems, processes, and how each employee is affected by those. Another benefit of the systems theory can help identify what contributors outside of the training design can and do influence employee and team effectiveness.

Establishing the most effective training program not only helps employee efficiency but also creates a strong foundation for a positive culture and provides ways to integrate individuals into the organization. “The human need to be oriented and build confidence is the underlying objective of onboarding” (Maurer, 2022). The McKinsey 7-S Model is a strategic model for “collectively determining how a company will operate”. The aspects of organization described in McKinsey’s 7S model are Strategy, Structure, Systems, Staff, Style, Skills, and Shared values. These elements can be broken up into hard and soft skills, yet to be successful they must be “aligned and mutually reinforced” (Sullivan et al., 2013). This model can be instrumental in onboarding programs for a number of different reasons, including effective alignment and program design. Incorporating and addressing these 7 elements into onboarding programs assures that all aspects of an organization are covered and information is delivered.

The last framework piece utilized in this case is the Appreciative Inquiry (AI). This focuses on the positives within an organization and allows for building upon the existing strengths. When focusing on things going well, leadership, organizational team members, and everyone involved is able to visualize the problem differently and are more openly able to solve the challenge before us (Meinert, 2018). Specifically, the 4D model of appreciative inquiry, wherein the 4Ds are Discover, Dream, Design, and Destiny (Cooperrider & Godwin, 2011 as cited in Moore, 2022), allows for various phases moving in sequence. This model is useful in interviewing to gather qualitative data as it incorporates open-ended questions and flexibility easily adaptable to any situation. (Moore, 2022).

# Methods

Once Team 5 had received participatory confirmation from our client, we each deepened our understanding of what TSP does and stands for. Rob Sepeda being the Director of Human Resources at TSP. helped a great deal for our team. We could rely on steady communication between the organization and Team 5. Mr. Sepeda also provided answers for team members with any lingering inquiries in regard to the organizational operations. Though Mr. Sepeda is highly experienced in his role at TSP and the organization in general, Team 5 recognized the potential bias that could occur if we were to base all our data gathering and learning on what Mr. Sepeda shared. Therefore, Team 5 sought to collect data via survey distribution and by conducting an interview.

**Data Collection: Survey**

Team 5's first method of data collection was a survey distributed among managers at TSP, Inc. For reference, the survey and survey responses can be located in Appendix A.1 and A.2. Team 5 chose to survey the managers due to their active involvement in onboarding training practices. Our team crafted survey questions that would provide us with deeper insight into what Mr. Sepeda had introduced. We focused on creating a set of questions that ranged from informal to formal, which would give us an idea of what kind of leader each manager is. In addition, the survey served as an opportunity for managers to share any feedback, suggestions, or frustrations. However, since Mr. Sepeda would be the one to distribute the survey among managers, Team 5 made it a priority to assure confidentiality to the survey participants. Therefore, we created an anonymous questionnaire utilizing Google Forms - a platform that TSP managers were already familiar with. The layout of our questionnaire consisted of a Likert Scale, multiple choice, select all that apply, and free response questions. Accordingly, our team crafted the answering mechanism in a uniform fashion so that the user experience would be seamless and clear. Our team found it important to use a familiar, easy-to-navigate platform in order to gather as many thorough responses as possible effectively.

**Data Collection: Interview**

Team 5’s additional method of data collection was an interview with the Senior Trainer at TSP. For reference, interview questions and key responses can be located in Appendix B. Our team chose to conduct an interview with the Senior Trainer due to his frequent interaction with the managers who partake in the onboarding training processes for newly hired team members. Due to the varying locations between the Senior Trainer and Team 5 members, the interview was conducted virtually via the Zoom platform. To ensure an unbiased and more welcoming approach, our team agreed to have Mr. Sepeda be absent during the conduction of the interview. The Senior Trainer granted permission to our team for the interview interaction to be audio recorded. Having this extra method of data collection made the provided answers much more accessible for our team, especially when conducting analyses. We were able to pinpoint the exact timestamps of the answers to each question and replay as many times necessary for our understanding. Accordingly, during the interview, our participating team members served different roles. Prior to the interview, we designated who would pose questions and who would be the note-taker. Having these roles assigned ahead of time made the interview process run smoothly allowing us to provide the Senior Trainer with a rundown of what to expect during our interaction.

# Results

The data collected from the survey among managers and the interview with Senior Trainer, Mr. Shawn Foster, provided our team with insight into various factors that affect the onboarding training program and its implementation. Considering how the survey was distributed to the managers who oversee the new hires and are responsible for the implementation of the onboarding program, the questionnaire’s focus was to get an understanding of the strategies used to support the new hires as well as the challenges faced by the managers to help reach the 45-day deadline for the onboarding training program.

The first theme that was explored through the survey was “Connection”. Team 5 asked questions that gave us an idea of how often managers performed check-ins with their new hires as well as other managers and their HR, and how this connection influenced the implementation of the onboarding training program. In regards to checking in with the new hires, 30% of the managers responded that they connected once a week, while the other 30% of the managers responded that they connected with their new hires every day. Furthermore, to understand how this connection was made, we asked the managers to highlight the strategies they use to support their new hires, to which around 80% of them responded that they used “email reminders” while 50% of the managers responded that they supported by way of verbal reminders and/or helping their subordinates get started with the Learning Management System.

To extend the theme of connection, another question was asked to know if the managers connected with other managers. Our team found it interesting that while 40% of the respondents agreed that they connected with other managers, 40% of managers responded in disagreement. Effective integration of managers with their peers can create strong leadership and enriched team (Carter et. al, 2013). This can be a point of focus when looking at improvements to implement within the organization, which is to increase the connection of managers with each other.

Our survey also explored the theme of “Value” by checking if the managers felt that their work added value to the organization. The survey showed that 40% of the managers believed that their role in overseeing the onboarding training program for the new hires did not make a difference for either the organization or the trainee. This question was aimed at understanding whether the managers felt that they added value to the organization and their subordinates, to which the data shows that the majority of them disagreed. This is an area that can be improved upon to help middle managers realize that their actions add value to the organization and its goals. Furthermore, the survey showcased that the majority of the subordinates were open to feedback and receptive to new ideas which highlight that the staff at TSP promotes open communication and positive relationships between managers and their subordinates. This theme is further discussed in the analysis of the data collected from the interview with Mr. Foster.

Managers also shared the challenges they face in implementing the onboarding training program. Some of the challenges described by the manager are, “unrealistic onboarding times”, “lack of time to connect with the new hires”, “too many direct reportees”, “too many employees to oversee” etc. These challenges indicate that managers understand the importance of “connecting” with the new hires to support them but are not able to do so due to a lack of time or too many direct reportees.

To understand the structure of the training program and how it is implemented we asked Mr. Foster to brief us about the onboarding training program during the interview. It was stated that the company policy requires all IT Engineers to achieve the required NetApp and Pure Storage certification before the employee can be signed off to perform the IT services in the field. Once hired, all employees must complete 14 training modules that go over various topics such as “compliance training, email etiquette, password management, timesheet and expense reporting, code of conduct, etc.” Additionally, all employees are required to complete safety training, which includes topics such as first aid, proper lifting, slip and fall prevention, and active shooter, among others. Employees are given a 45-day completion deadline for all of the training except the driver safety training, which must be completed within 30 days of hire.

In our interview, Mr. Foster identified multiple strengths of the current processes. First, he discussed how advantageous the transition of the onboarding training from an externally created generic presentation of information to an internally created system presenting information personalized to TSP systems, structures, values, and ways. Previously, benefits information was explained via a phone call with no way of revisiting the information whereas now a TSP-specific module is continually accessible to employees. Another strength Mr. Foster mentioned as a key element to team success, is a culture of open and consistent communication, in fact referring to it as an “open door policy”. Because of this, TSP works to create a comfortable relationship allowing team members the comfort to provide honest feedback - no matter positive or negative. Also mentioned in regards to the onboarding training and systems, was the use of internal surveys for providing feedback specifics to employee onboarding. These surveys are distributed at week 1 and 90 days to new hires and also include the use of exit surveys. The information gathered in these surveys is reviewed and the programs are reevaluated biannually, utilizing the data to incorporate improvements as necessary. The final strength mentioned during the interview, shared that in the near future, a new online program will provide the opportunity to ask managers and trainees, “Is there anything you feel you need that you are not getting?” via an online discussion. This is a critical step in providing an additional avenue for providing feedback.

Also identified were challenges faced with the current processes. First and foremost, the high volume of unmet deadlines for all training proves challenging. With a 30+ member team for each manager, often new hires are not completing the training in the set time frame. The manpower used in monitoring onboarding training completion deducts from organizational efficiency and productivity. Another challenge Mr. Foster discussed is that while the internally created training includes a wide range of information, it is perhaps too long in time and depth of content.

Through the survey and the interview, the team was able to gain an insight into various aspects like structure, system, style, strength, and challenges of the onboarding training program and the members of the organization who were responsible for the implementation of the training program. In our analysis of the data collected we identified themes such as connection, values, and leadership that impacted the success of the completion of the onboarding training program within the set timeline.

# Discussion

Based on the analysis of our gathered results, Team 5 identified a number of effective HRD, OD, and T&D practices modeled by TSP. All practices go hand-in-hand in contributing to delivering a successful onboarding training experience for newly hired employees. TSP believes that effective and committed employees result from an informative and well-delivered onboarding training process. Accordingly, the organization models effective practices by carefully crafting each onboarding training, engaging the newly hired team members in the company values, and by demonstrating Appreciative Inquiry towards onboarding development efforts.

**Role of McKinsey’s 7s Model**

Firstly, the analysis of our collected data revealed that TSP consistently models the seven aspects described in the McKinsey model as Strategy, Structure, Systems, Staff, Style, Skills, and Shared values. The McKinsey 7s “framework surpasses the classic simplistic notion that 'structure follows strategy' as it links strategy not only with structure but also with other five elements” (Channon & Caldert, 2015, p. 1). This framework makes TSP more effective in adapting and addressing its onboarding training practices.

A great practice that TSP adheres to during its onboarding training process is emphasizing how much of an impact each new team member has on the organization. “Our people are our company” is what Senior Trainer, Shawn Foster proudly exclaimed. This practice models Shared Values, Strategy, and Structure of McKinsey’s 7s Framework. “Shared values define the organization’s key beliefs and aspirations and form the core of its corporate culture” (Channon & Calder, 2015, p. 2). Suitably, TSP makes it a priority to engrave its core value of “Empowered Difference Makers Thrive Here” (mytsp.net) into the values of its new hires. The Strategy aspect of the McKinsey 7s framework enables an organization’s competitive position by providing a unique value (Channon & Caldert, 2015, p. 1). Thus, by instilling this company culture, TSP promotes long-term organizational growth. Our team believes doing this is a great strength for the organization as “training and leading by example can serve as effective methodologies for… bringing about culture change in organizations” (Schraeder et al., 2005, p. 492).

Another effective practice done by TSP is that they are consistent in updating their onboarding training programs. This practice models the Shared values, Structure, Systems, Staff, and Style components of McKinsey’s 7s model. Mr. Foster admitted that initially, the organization’s onboarding training material was very broad and generic. However, Team 5 believes the company was effective in recognizing the downsides to this method, and, in turn, entirely revamping the material and delivery. “Employees who know what to expect from their company’s culture and work environment make better decisions that are more aligned with the accepted practices of the company” (Maurer, 2019, p. 2). Team 5 recognizes that an organization’s culture and environment may change over time, therefore, TSP is effective in accommodating any such changes by regularly reviewing their current onboarding training material and updating it as needed.

**Role of Appreciative Inquiry**

The Senior Trainer proudly expressed how managers have crafted an interactive onboarding method that keeps the participants engaged. Tactics include hosting an enjoyable instructor-led training component and implementing an open-door policy. These practices model the Design and Destiny components of the 4 D Appreciative Inquiry (AI) cycle (Cram, 2010, p. 6). This cycle makes TSP more effective in identifying the most successful factors of their current onboarding training doings. Like Mr. Foster, Team 5 believes that these methods make up a great process and strength for the future of TSP. “Co-constructing what is ideal and planning how to get there” (Cram, 2010, p. 6) is part of *designing* interactive onboarding pieces, in this case, the engaging instructor-led portion resulted in being successful. As for the Destiny component of the 4 D AI cycle, maintaining an open door policy “[sustains] supportive relationships” among TSP managers and newly-hired team members (Cram, 2010, p. 6).

**Barriers**

A major barrier within TSP are time constraints. Mr. Sepeda expressed the organization-wide challenge for managers to complete their post-onboarding items within the desired timeframe. From our data analysis, our team determined that perhaps each manager has too many new hires under their responsibility, leading to another challenge faced by the company which is determining what number of employees is the right number for a manager to administrate. Mr. Sepeda admitted that this has been an ongoing difficulty and have yet to determine an effective solution.

# Summary and Conclusions

As a team we greatly appreciated Technology Service Professional Incorporated’s eagerness to improve and upgrade, as well as the company’s humility in welcoming graduate students to research, analyze and speak about what opportunities for growth we see. In fact, these two qualities, eagerness to grow and humility, at a leadership level, will be essential for TSP to navigate the complex corporate waters they are charting, achieving success in whatever way they choose to define it. Jennings notes that an organization that is humble at its core will do, “The best job of consistently growing revenues,” thanks to the communicative, creative and engaging atmosphere that humility hosts (p.14, Jennings, 2012). While we did not speak directly with TSPs founders we were able to experience the values they have instilled in the company through our interactions with the HR and training department leads. Also in the area of leadership, we were encouraged by TSP’s nuanced engagement with all parts of McKinsey’s framework on a leadership level. This demonstrates that this company has the systemic capacity to achieve excellence in its field. Our interview questions intentionally sought to draw out positive growth areas while giving ample space to expose gaps that might be hiding within the weak points of the company’s framework. Our conclusion is that there is a lot of strength in the holistic structure of TSP.

After analyzing the data from our research, interview, and surveys, one of the main issues we have identified is the quality of connection among managers and between managers and their supervisors. These middle managers operate within a critical role for both the company and the customer, yet can easily fall prey to “middle bashing.” (p.120, Carter, 2013). As many companies have learned, infamously Kodak, managers matter to the wellbeing of your company. (Oren, 2019). An additional issue of concern is the lack of confidence on the part of the managers that their role adds value to the TSP community or makes a difference for those involved in the training. As reflected in our results section, our surveys indicated that aspects of the company culture tell a polarizing story with experiences widely varying despite strong values, vision, and leadership. Though an earlier understanding of organizational development would suggest the need to explore each detail, current OD practices encourage a more systemic and dynamic view of change. In light of this, we suggest two interventions that could address these multifaceted challenges and strengthen what is already a strong company. Suggested Interventions:

1. As TSP looks to create a more defined leadership training for its managers, introduce the vision of a manager's peer group strategy as discussed by Oshry including the vision of peers dispersing and integrating to create a “virtuous cycle” that enriches the individual and the group. (chapter 8, Carter, 2013). See Appendix C for the diagram.
2. As TSP looks to be a learning organization, roll out 2023 Crucial Conversations Training for all senior staff and managers. The temptation with organizational change is to find an external structure to tweak in order to squeeze out greater profitability, but in the case of TSP, the systems and policies are in good form. Change from good to great levels will need to be internal, personal ones and Crucial Conversations Training has been documented to show that “performance rose more in units that reported better dialogue.” (p.487, Carter, 2013). There are multiple avenues for training to consider and even different training content depending on the needs of the company. See training opportunities here: <https://cruciallearning.com/crucial-conversations-for-dialogue/> See a three-minute summary of Crucial Conversations Training here: <https://www.youtube.com/watch?v=UX-ArZJJJ1U>

An additional issue our team would suggest needs further attention after analyzing the data is the ratio of direct reports (new hires) to any given manager. The uncomfortable sense expressed by the HR department of “managers being overwhelmed” and the intractable problem of too many trainees to oversee each manager is an issue that needs greater attention. The human resource and the training departments both expressed their belief that the people are the resources of the company, yet in the issue we highlighted here, these “resources” are being overdrawn and spent too recklessly for sustainability much less growth. The two interventions proposed above will have a long-term beneficial impact on this *ratio of trainees*’ dynamic through indirect means, but our team believes that more timely intervention is needed to stave off an unnecessary loss. This could be in the form of an intentional appreciative inquiry (AI) with the managers. The benefit of AI in this circumstance is that it invites participation from the managers, who themselves are feeling overwhelmed and undervalued, to contribute positively to possibilities, while minimizing skeptics and critics of standard evaluation practices. (Chapter 9, Carter, 2013). We would recommend following up with Dr. Michael Beyerlein at Texas A&M University to inquire after a graduate student group in the Spring of 2023 to assist you in planning and carrying out this particular focused appreciative inquiry.  
 In conclusion, we are encouraged by Technology Service Professional, Inc’s trajectory toward growth, and we suggest two interventions to maximize this growth. Furthermore, we suggest one additional area of exploration to minimize the known and unknown barriers along the growth path. It has been our pleasure and privilege to work with the fine people at TSP and we wish them all the best.

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# Appendices

**Appendix A.1**

**Survey Questions**

You are invited to participate in a survey conducted by Team 5, a group of graduate students from the course Organizational Development and Performance Management in HRD in the College of Education and Human Development at Texas A&M University. The purpose of this survey is to allow our graduate student team the opportunity to synthesize course material through the study of an organization. This area of focus is the onboarding training program of Technology Service Professionals (TSP) to determine areas of growth that can be achieved through human resources development best practices.

Your feedback will be available to Team 5, the Course Professor at Texas A&M University, as well as the HR Leadership team at TSP. Your participation in this survey is voluntary. If you agree to participate, please complete this one-time, 10-minute survey.

If there are any questions you may contact Dr. Beyerlein at Texas A&M University, [beyerlein@tamu.edu](mailto:beyerlein@tamu.edu).

1. How long have you been with TSP?
   1. Less than 1 year
   2. 1 to 3 years
   3. 3 to 5 years
   4. 5 or more years

**These 5 statements will be on a level of agreement or disagreement, place an X in the appropriate box**

| **Strongly Agree** | **Agree** | **Neither Agree or Disagree** | **Disagree** | **Strongly Disagree** |
| --- | --- | --- | --- | --- |
| **1** | **2** | **3** | **4** | **5** |

|  | **1** | **2** | **3** | **4** | **5** |
| --- | --- | --- | --- | --- | --- |
| 1. I regularly connect with other managers in TSP. |  |  |  |  |  |
| 1. I feel encouraged through my connections with other managers to consider new or more effective methods in the onboarding process. |  |  |  |  |  |
| 1. I feel equipped through my connections with HR to consider new or more effective methods in the onboarding process. |  |  |  |  |  |
| 1. My subordinates are receptive to feedback and new ideas. |  |  |  |  |  |
| 1. What I do in overseeing the trainees makes a difference for the trainee and for TSP. |  |  |  |  |  |

**These questions will be a mixture of multiple-choice and short-answer responses**

1. I connect with my new hires to check on the progress of their onboarding training modules \_\_\_\_.
   1. Every day
   2. Once a week
   3. Once a month
   4. Twice a month
   5. Never/Seldom
   6. Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. What strategies do you use to support your newly hired trainees in their onboarding process/to complete their onboarding training requirements? (*please check all that apply*)
   1. Weekly/monthly/frequent email reminders
   2. Help them get started with the Learning Management System (LMS) and modules
   3. Verbal Reminders
   4. Set team deadlines
   5. Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. What factors have you noticed to be motivating for your trainees in the onboarding training program (choose as many as applicable):
   1. Connection with supervisor
   2. Connection with colleagues
   3. training methods
   4. training content
   5. training context
   6. future application
   7. personal determination
   8. Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Appendix A.2**Forms response chart. Question title: How long have you been with TSP?
. Number of responses: 10 responses.Forms response chart. Question title: I regularly connect with other managers in TSP
. Number of responses: 10 responses.

Forms response chart. Question title: My subordinates are receptive to feedback and new ideas.
. Number of responses: 10 responses.Forms response chart. Question title: I feel equipped through my connections with HR to consider new or more effective methods in the onboarding process.
. Number of responses: 10 responses.Forms response chart. Question title: I feel encouraged through my connections with other managers to consider new or more effective methods in the onboarding process.
. Number of responses: 10 responses.

**Forms response chart. Question title: What strategies do you use to support your newly hired trainees in their onboarding process/to complete their onboarding training requirements?
(Select all that apply)
. Number of responses: 10 responses.**Forms response chart. Question title: I connect with my new hires to check on the progress of their onboarding training modules  ________.
. Number of responses: 10 responses.Forms response chart. Question title: What I do in overseeing the trainees makes a difference for the trainee and for TSP.
. Number of responses: 10 responses.

Forms response chart. Question title: What factors have you noticed to be motivating for your trainees in the onboarding training program? 
(Select all that apply). Number of responses: 10 responses.

**Appendix B.1**

**Interview Questions**

Introduction:

We are a team of graduate students from the course Organizational Development and Performance Management in HRD in the College of Education and Human Development at Texas A&M University. This interview is a part of the case study whose purpose is to allow our team the opportunity to examine and come alongside a human resource department in the real world while examining and providing feedback to TSP, Inc. on the onboarding training program. The goal of this interview is to understand more about the onboarding training program from the perspective of the trainer. Our team would integrate and analyze the data from this interview and a survey with the selected group of managers to determine areas of growth that can be achieved through human resources development best practices.

The information you share and discuss during the interview will be kept strictly confidential and not be shared with any external parties. Team 5 has committed to only share gathered information amongst ourselves and with the course instructor, Dr. Beyerlein.

Audience: Senior Trainor - Shawn

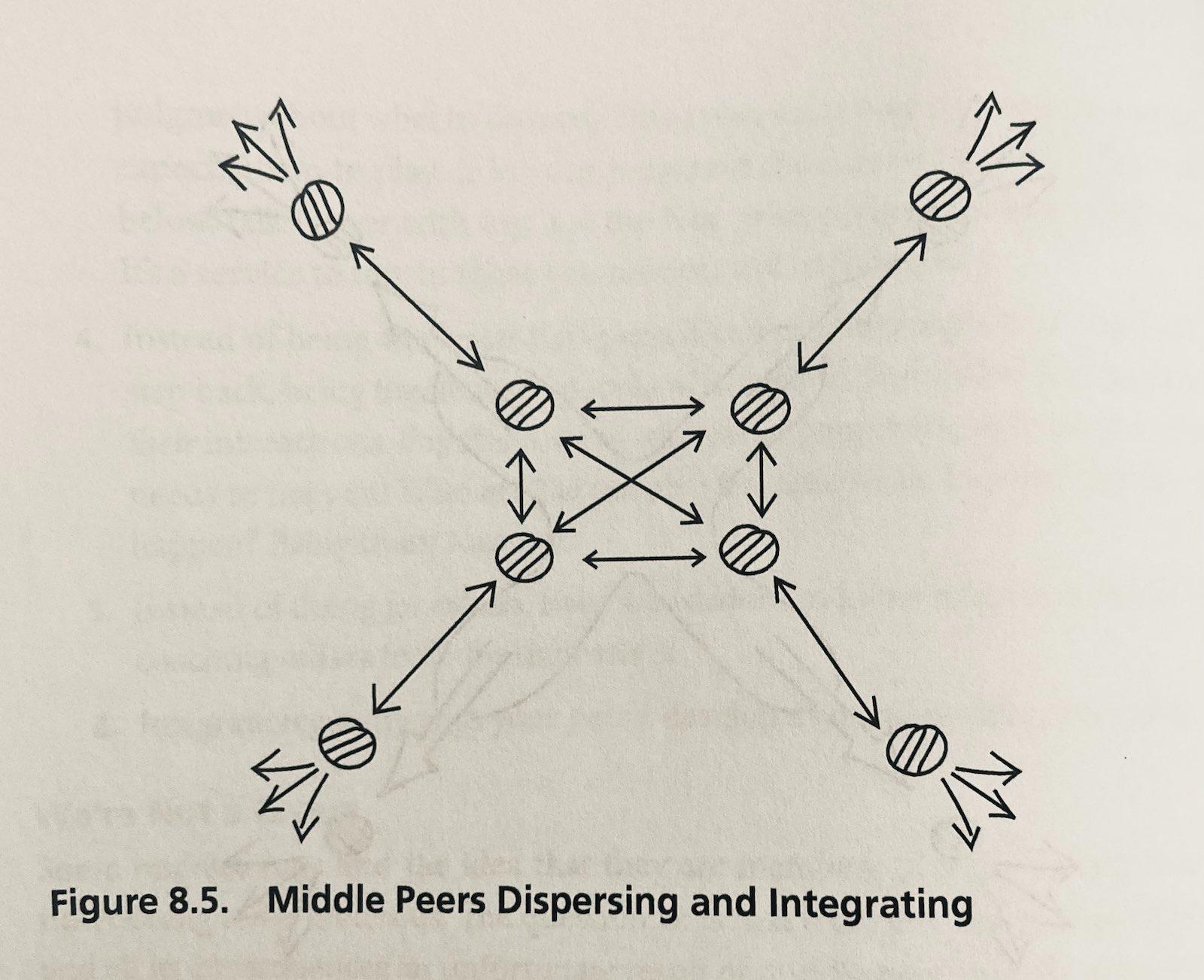
1. Please describe the onboarding training process and how is it delivered to the trainees. (If they don’t specify ask: What kind of technology/learning environment do you use to deliver the onboarding training modules? Virtual, Hybrid, in-person)
2. How do you update and develop the training program for trainees? How often are the training updated?
3. Please describe your leadership style as a Senior Trainer at TSP. (Follow-up questions: How do the strengths of your leadership style impact the training? What other impacts on the training come from your leadership?)
4. This past year, what would you describe as a significant learning experience as a Senior Trainer at TSP?
5. Describe an accomplishment or achievement of the managers who implement your onboarding training that made you proud during your time as a Senior Trainer at TSP.
6. How are TSPs values exhibited throughout the onboarding training process? (i.e. “empowered difference makers thrive here”, and “real conversations are welcomed”)
7. Describe an instance when the onboarding training program succeeded. What made it a success, and how could it be improved?
8. What kind of support is given to the managers to help them achieve their goals in regard to the onboarding program?
9. How do you gather feedback from the managers and trainees in the onboarding training process?
10. To conclude the interview, we want to ask a *blue sky dreaming* question. How do you envision an excellent onboarding program to look like?

**Appendix B.2**

**Interview Response Coding**

| **Time Stamp** | **Question Number** | **McKinsey 7S** | **AI** | **Comments** |
| --- | --- | --- | --- | --- |
| 7.04-7.20 | 1 | Style, Strategy, Systems |  |  |
| 3:20 | 1 | Structure, Staff & Skills |  | 3 Training and Development Instructors who lead the technical skills training for the organizations in NetApp and Pure Storage Storage software and equipment. NetApp has three levels of the certification course. Pure Storage has two levels of certifications. TSP has a Training Center located in Richardson, Texas that requires all IT Engineers to achieve the required NetApp and Pure Storage certification before the employee can be signed off to perform the IT services in the field. |
|  |  | Structure, Strategy, Skills |  | All employees upon hire must complete a 14 training module that goes over various topics such as "compliance training, email etiquettes and password management, timesheet and expense reporting, code of conduct, etc." |
| 5:15 | 1 | Skills |  | All employees are required to complete the Safety Training that includes but not all first aid, proper lifting, slip and fall prevention, active shooter. Employees have 45 days to complete the training. |
| 5:48 | 1 | Skills |  | All employees are required to complete the Driver Safety Training within 30 days of hire. The purpose of the course is to promote driver awareness and meet the organization's auto insurance policy requirements |
| 6:10 | 1 | Skills |  | The final training requirement for IT Engineers is to partake in Data Center Safety Training |
| 7:00 | 1 | Skills |  | Texas Instruments take additional safety training that the customer requires all contractors. |
| 8:26 | 1 | Skills |  | Shawn evaluates the training (he has an extensive background in IT training) |
| 8:29 | 1 | Strategy, Values |  | "fingers on keyboards as fast as possible" |
| 8:48, 9:15 | 1, 2 | Shared values |  | run surveys after every training. Clearly a high value for effective and efficient training |
| 9:48 | 2 | Staff, Structure |  | "i firmly believe" statement is strong- no designing in a vacuum- |
| 9:08 | 2 | Strategy, Staff, Structure, Shared Values |  | Shawn is the sole Training and Development Specialist he evaluates and collaborates with Subject Matter Experts (i.e., IT Field Engineers, Operations Coordinators, etc.) on current training programs to determine if the content is the most current information. |
| 10:25- 10:48 | 3 | Structure |  | Shawn is the training dept, he didn't seem to connect his leadership style with indirect influence beyond the team he leads |
| 10:30 - 11:46 | 3 | Shared Values, Strategy |  | Shawn formed a Learning and Development Committee once a month to collaborate about the organization's current and future training needs. The L&D committee is made up of individuals from various departments. |
| 13:40 | 3 | Style |  | Shawn mentioned is strength is effective communication with others that builds trust. Having these skills as lead the training to have fresh training content |
| 13:55 - 15:08 | 4 | Systems, Skills |  | Shawn mentioned in the past year, he focused on learning new software tools such as Articulate 360 and Rise including learning how to implement AI Voice Software to the training content. The organizations appears to be focused on ensuring training is ADA Compliant |
| 16:00 | 5 | Staff, Skills, Systems | \*\* | Shawn expressed how the managers would consistently make modifications and made instructor-led training enjoyable and engaging. \*\*Appreciative Inquiry is modeled in how Shawn recognizes this achievement to be a great process and a strength for the organization. |
| 18:00 | 6 | Shared Values, Strategy, Structure |  | Shawn described how they emphasize that "our people are our company"-- they are representing TSP |
| 20:07 | 7 | Shared values, Structure, Systems, Staff, Style |  | Onboarding training transitioned to being internally created therefore presenting generic information to personalized to TSP. Originally benefit information was explained via a phone call vs now a TSP-specific module is continually accessible to employees. While it is in-depth, perhaps too long in time (20 minutes) and depth of content. |
| 23:19 | 8 | Structure, systems, staff, style | \*\* | Open and consistent communication, an "open door policy" and a comfortable relationship to provide feedback are all key elements to team success. The internal survey was utilized for feedback regarding onboarding (distributed at week 1 and 90 days to new hires) and exit surveys. Programs are evaluated biannually utilizing survey data to incorporate improvements as necessary. |
| 25:35:00 | 9 | Structure, systems, staff, style, skills | \*\* | Upcoming new online program will have the opportunity to ask managers and trainees "Is there anything you feel you need that you are not getting?" via an online discussion providing an additional avenue for providing feedback. |
| 26:42:00 | 10 | Shared values, structure, systems, staff, style, skills | \*\* | Ultimate goals for onboarding program: concise, brief, informative, engaging, better avenues for feedback, milestone check-in; flawless top to bottom including manager's tool kit; smooth and easy process |

**Appendix C**

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(p. 128, Carter, 2013)