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*Online Onboarding:  
Corporate Governance Training  
in the COVID-19 Era*

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# Online Onboarding: Corporate Governance Training in the COVID-19 Era

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Onboarding new directors is critical in the best of circumstances. What should organizations do when training new board members must be completed online? COVID-19 has forced both ordinary and extraordinary business functions to be conducted primarily online, and online onboarding may be necessary or preferred in a number of business contexts. This Article first reviews the best practices in director onboarding and explains the functional goals of those practices. It then explains how to leverage the power of virtual data rooms and virtual conference software to successfully onboard new corporate directors with virtual meetings. These strategies apply to both for-profit and non-profit boards and can be employed to enhance any online meeting or conference where the goals include informing and engaging participants while encouraging them to socialize.

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## **I. Introduction**

Director onboarding is the process by which an organization facilitates a new director stepping into the role. It is a means by which an incoming director becomes familiar with their new surroundings, the organization, their fellow board members, and other organization leaders. As such, it is an inherently personal experience that has always necessitated face-to-face interaction, whether it takes place in the boardroom and adjacent offices, company retreats, or happy hours. Until 2020, tried-and-true onboarding methods functioned effectively, and there was no reason to reimagine the onboarding process as a potentially virtual procedure. Unfortunately, the novel coronavirus brought about unprecedented and confusing circumstances, and organizations worldwide were forced to shift their entire business platforms online with little or no time to prepare.

In the COVID-19 era, it is increasingly apparent that traditional business models are simply impossible to maintain, and proven methods of director onboarding are no exception. If boards wish to integrate new directors and perform as effectively as they had before the pandemic, they will need to translate their onboarding procedures to an online format. To do so, organizations must first assess their onboarding procedures to identify strengths and weaknesses. To this end, we first must ask: what are the key components of an effective onboarding program in ideal circumstances?

After the key components of director onboarding before COVID-19 are identified, we may attempt to translate those components into their online analogs. As we will see, some components of effective onboarding programs are more easily adaptive to an online format than others. Moreover, organizations may find that methods used to onboard new directors remotely are, in fact, less time-consuming and more efficient than traditional, in-person practices. Moving director onboarding to an online format will include utilizing traditionally pedagogical methods paired with online data sharing applications, as well as using services such as Zoom to stay connected through informal, community-building events.

The pandemic has thrown traditional business practice into disarray. Onboarding organizers should see this as an opportunity to rethink and reshape their onboarding practices. Even after business returns to a state of normalcy, onboarding organizers can employ online techniques to be more efficient and better equipped to handle unforeseen circumstances. Shifting the perspective from a state of chaos to a chance to refine onboarding

practices benefits both current and future directors and results in a more effective board.

## **II. The Essentials of Onboarding**

Before determining how to best move onboarding to an online format, the key components and best practices of pre-pandemic director onboarding must be identified. In this section, we identify and outline those practices which should be implemented in any onboarding program. Director onboarding typically begins with the organization delivering to the new director as much tangible information as possible, as quickly as possible, including details on finances, risks, and business strategies. Informal information, such as details on intangible group dynamics within the organization itself, must also be conveyed.

The delivery of informal information is illustrative of the socialization process, which is equally important to the efficacy of the board as is familiarizing new directors with business data and strategy. Socialization can be achieved through a number of onboarding techniques, including creating a mentor-mentee system in which a fellow director acts as a mentor for the incoming director in the first weeks of their employment. Ethical and responsible behavior from the executive team and onboarding planners will also introduce the new director to board culture, accelerating their understanding of the organization and making their transition into their role as smooth as possible.

The third key component of director onboarding is motivation of new directors, and is perhaps more important now than ever as business moves online and directors work from home. Motivating incoming directors means maintaining a focus on the organization's mission through connecting the mission to the day-to-day goals of the director. Ultimately, the onboarding process should be designed to motivate the new director to "own" their work, internalize the organization's mission, and move toward greater autonomy.

### **A. Information**

At the highest level, directors transform information into value. Therefore, someone transitioning into a director role must learn to access information in order to create value.<sup>3</sup> At the outset, the director onboarding process should provide enough information about the company to enable a new

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<sup>3</sup> Driscoll, M., & Watkins, M. D. (2020, May 18). *Onboarding a New Leader - Remotely*. Harvard Business Review <https://hbr.org/2020/05/onboarding-a-new-leader-remotely>

director to add value as quickly as possible.<sup>4</sup> The starting point for all onboarding programs should be focused on conveying as much company information to the new director as possible. Information on how the company operates and their role in the organizational structure equips an incoming director with the tools necessary to become a valuable member of the board in the shortest amount of time possible. Without the necessary information, a new director may be disoriented in their first crucial weeks or months with the board, severely diminishing their efficacy. In this section, we cover the crucial information that must be conveyed at the outset of the onboarding process, and methods for conveying the information—the “data dump,” personally tailored information, and informal information.

### 1. Data Dump

A data or document “dump” is an effective way to ensure that a new director possesses enough information to adequately familiarize themselves with the company’s tangible characteristics.<sup>5</sup> An initial data dump should include, among other items, any organizational charts, financial reports, the company’s charter and bylaws, codes of ethics and conduct, strategic plans and project documentation, and other key corporate policies.<sup>6</sup> This is usually accomplished in the form of a comprehensive package of key documents assembled by an organization’s secretary or a committee of the board for the incoming director’s review. In a recent survey of 200 senior interim executives, 95% stated that access to such information made them more effective in their first few weeks.<sup>7</sup> Furthermore, access to information broadens the incoming director’s view of the organization and their role in the organizational structure.<sup>8</sup> Minutes for the past few board meetings and all committee meetings, regardless of whether the new director is assigned to a particular committee or committees, will give the director a more comprehensive view of the company as they enter their new executive position.<sup>9</sup>

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<sup>4</sup> KPMG. (2019, March 26). *New Director Onboarding*. KPMG. <https://boardleadership.kpmg.us/content/dam/boardleadership/en/pdf/2016/new-director-onboarding-strategy.pdf>

<sup>5</sup> Driscoll, M., & Watkins, M. D. (2020, May 18).

<sup>6</sup> Levinson, J., Hodgdon, S., & Rasmussen, N. P. (2018, October). *All Aboard! Facing the Challenges of Recruiting and Onboarding Directors*. ACC Docket. [https://www.accdigitaldocket.com/accdocket/october\\_2018/MobilePagedArticle.action?articleId=1427564#articleId1427564](https://www.accdigitaldocket.com/accdocket/october_2018/MobilePagedArticle.action?articleId=1427564#articleId1427564)

<sup>7</sup> Savannah Group. (n.d.). *Interim Candidate Questionnaire*. Savannah Group. <https://savannahgroup.typeform.com/report/Q9PFQz/uYUvkmMrREPwyNhe>

<sup>8</sup> Driscoll, M., & Watkins, M. D. (2020, May 18).

<sup>9</sup> KPMG. (2019, March 26).

## 2. Personally Tailored Information

The best onboarding programs are formalized and tailored to take into account the unique backgrounds, experiences, and expected committee responsibilities of each new director.<sup>10</sup> Onboarding organizers must provide new directors with information on their particular role in the organization, such as how to administer and manage company policies and programs.<sup>11</sup> In this area, the challenge for any board is to tailor the program to the specific needs of the new director, as new directors have varying familiarity with the role of the director.<sup>12</sup>

Onboarding organizers should be mindful of the varying experience levels of incoming directors. For this reason, onboarding programs may be separated into two tracts to compensate for a new director's prior experience, or lack thereof. A program incorporating general training on the role of the board and its directors may be necessary for first-time directors without previous board experience.<sup>13</sup> The same program may not be necessary, however, for a more familiar new hire. Some experts suggest that onboarding should be tailored for each individual board member. This may be the best way to ensure that the board members are aware of their duties, but may not be feasible for small organizations. At a minimum, most organizations can provide the bare necessities for both experienced and inexperienced board members. Legal, fundraising, ethical and advocacy responsibilities of the board, as well as any specific matters over which the particular new director is responsible, should be a main focus of onboarding programs.<sup>14</sup> Additionally, any special roles and responsibilities associated with being a representative of a particular stakeholder or constituency must be communicated to the incoming director by senior board members, the executive team, or a combination of the two.<sup>15</sup>

The idea of tailoring the program assumes that onboarding organizers already know something about the new hire. To obtain the necessary

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<sup>10</sup> Spencer Stuart. (2018). *New Director Onboarding: 5 Recommendations for Enhancing Your Program*. Spencer Stuart. <https://www.spencerstuart.com/research-and-insight/new-director-onboarding>

<sup>11</sup> SHRM. (2019, August 16). *Managing the Employee Onboarding and Assimilation Process*. SHRM. <https://www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/onboardingandassimilationprocess.aspx>

<sup>12</sup> Levinson, J., Hodgdon, S., & Rasmussen, N. P. (2018, October).

<sup>13</sup> Spencer Stuart. (2018).

<sup>14</sup> MacDonald, E. G. (2016, May).

<sup>15</sup> MacDonald, E. G. (2016, May).

information, onboarding organizers should assess the new hire's experience in the director capacity, their familiarity with the industry, and any past experience with the company.<sup>16</sup> This can be done with relative ease, and will most likely occur naturally through the interview process and following meetings with the executive team. Once onboarding organizers understand the incoming director's level of experience and familiarity, they will be better equipped to deliver any nuanced or personal information the director may need, such as the sensitive information covered in the following section.

### **3. Informal Information**

Not everything can be conveyed in documents and binders. Some information—especially information about key people and relationships—needs to be communicated in more conversational or subtle ways. A priority for onboarding organizers should be to brief new directors on information regarding potential company influencers, such as employee organizations, shareholder activists, institutional investors, and issue-driven investors.<sup>17</sup> Understanding the interests of potential influencers and the company's past interactions with particular organizations will help a new director contextualize the relationship between the company and the organization in the present, as well as identify potential issues in the foreseeable future.

Informal information may be conveyed casually over happy hour drinks, a cup of coffee, or a regular lunch meeting. The web of relationships and group dynamics inherent in an organization can be hard to navigate for any newcomer, and understanding this information is arguably as critical to the smooth functioning and effectiveness of the organization as the documents and binders provided in the initial data dump. This process of enculturation in the workplace brings about the second component of director onboarding—socialization.

#### **B. Socialization**

Organizational socialization is the process of quickly familiarizing new employees with an organization's practices, culture, and values in order to help them become effective members of the professional community.<sup>18</sup> Socialization is integral to creating and maintaining a productive company culture. Even in elaborate onboarding programs, organizations need to be cognizant of the power of informal interactions between new employees

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<sup>16</sup>Spencer Stuart. (2018).

<sup>17</sup> Katz, D. A., McIntosh, L., Wachtell, Lipton, Rosen & Katz. (2019, March 29).

<sup>18</sup> Acendire Talent. (2015, October 15). *Organizational Socialization & How it Impacts Employee Onboarding*. Acendire. <https://www.acendire.com/blog/posts/organizational-socialization-how-it-impacts-employee-onboarding-part-one/>.



and their peers and superior officers.<sup>19</sup> Here, we discuss three key aspects of socialization that any organization can be attentive of and implement in their onboarding program—setting the tone, mentor-mentee systems, and meetings.

### 1. Setting the Tone

Setting the tone in the workplace means to establish a particular atmosphere and character for the organizational culture.<sup>20</sup> When starting a new job, newcomers must not only learn the tasks and expectations of their work, but must also decipher the unwritten rules and norms of the company's culture to achieve membership and a sense of belonging.<sup>21</sup> Incoming directors are no exception. Boards must keep in mind that document sharing and meetings are not simply tools used to provide new directors with information. Every initial step in the onboarding process sets the tone of the general ethical atmosphere of the board and company leadership at the outset of the onboarding program. The board should convene to determine whether the materials they provide a new director are conveying what is important to the company.<sup>22</sup> Effective onboarding—that which sets the right tone in the boardroom—will produce board members who merit immediate respect and attention of their new colleagues.<sup>23</sup>

Onboarding an incoming director necessitates that the tone be set “from the top.” Onboarding organizers, the executive team, and senior board members can all contribute to setting the tone at the top through several methods, but consistency and integrity should be central to any onboarding program and organization. Unethical and dishonest behavior is a quick way to undermine credibility, especially for company leaders, and is no way to introduce a

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<sup>19</sup> Ellis, A. M., Nifadkar, S. S., Bauer, T. N., & Erdogan, B. (2017, November 16/June 20). *Your New Hires Won't Succeed Unless You Onboard Them Properly*. Harvard Business Review. <https://hbr.org/2017/06/your-new-hires-wont-succeed-unless-you-onboard-them-properly>

<sup>20</sup> Sudhakar, J. (2018, February 7). *LEADERSHIP IT SETTING THE TONE ALWAYS!!!* LinkedIn. <https://www.linkedin.com/pulse/leadership-setting-tone-always-ms-jemi-sudhakar> Sudhakar, J. (2018, February 7). *Leadership It Setting the Tone Always!!!* <https://www.linkedin.com/pulse/leadership-setting-tone-always-ms-jemi-sudhakar>.

<sup>21</sup> Korte, R., & Lin, S. (2013). *Getting on board: Organizational socialization*. Socialization and the contribution of social capital. Social Capital.

<sup>22</sup> Safford, B. (2017, April 8). *Are You Setting the Right Tone at the Beginning?* Compli. <https://www.compli.com/blog/are-you-setting-the-right-tone-at-the-beginning/>

<sup>23</sup> Katz, D. A., McIntosh, L., Wachtell, Lipton, Rosen & Katz. (2019, March 29).

new director to company culture.<sup>24</sup> Instead, the executive team and board must clearly communicate and exude the company's ethics and values, have a written code of conduct, hold frequent staff meetings, and engage in informal conversations that communicate and promote the company's ethics and values.<sup>25</sup> In addition, an effective mentorship program helps existing directors transfer institutional norms to new directors.

## 2. Mentor-Mentee System

A mentor-mentee system in the context of director onboarding means pairing the incoming director with an experienced peer with whom the new director may confer and consult throughout the onboarding process.<sup>26</sup> It is imperative that the mentor be a peer, and not a leader in the new director's chain of command, as another director will have an immediate understanding of the new director's role in the company and onboarding needs.<sup>27</sup> Onboarding mentors provide incoming directors with context in a situation where context is necessary to fully understand how to contribute to the board and company's success.<sup>28</sup> Additionally, mentors can shed light on cultural and unspoken social norms, broadening the new director's understanding of the organization.<sup>29</sup>

When instituting a mentor-mentee program, onboarding organizers should select knowledgeable board members who embody the mission and direction of the organization.<sup>30</sup> These individuals will be most familiar with the roles and responsibilities the incoming director will be expected to fulfill. Board members who are enthusiastic, empathetic, and well respected in the organization typically make good mentors.<sup>31</sup> Likewise, mentors

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<sup>24</sup> Coates, M. (2014, March 12). *Five ways to set the tone from the Top*. <https://www.theglobeandmail.com/report-on-business/careers/leadership-lab/five-ways-to-set-the-tone-from-the-top>. The Globe and Mail. <https://www.theglobeandmail.com/report-on-business/careers/leadership-lab/five-ways-to-set-the-tone-from-the-top/article17438855/>

<sup>25</sup> Corporate Financial Institute. (2020, January 12). *Tone at the Top*. CFI. <https://corporatefinanceinstitute.com/resources/knowledge/finance/tone-at-the-top/>

<sup>26</sup> Insala. (2019, August 6). *How to Create a Mentoring Program for Onboarding: Step-by-Step Guide*. Insala. <https://www.insala.com/blog/designing-a-mentoring-program-that-improves-onboarding>

<sup>27</sup> Driscoll, M., & Watkins, M. D. (2020, May 18).

<sup>28</sup> Klinghoffer, D., Young, C., & Haspas, D. (2019, June 76). *Every New Employee Needs an Onboarding "Buddy"*. Harvard Business Review. <https://hbr.org/2019/06/every-new-employee-needs-an-onboarding-buddy>

<sup>29</sup> Klinghoffer, D., Young, C., & Haspas, D. (2019, June 6).

<sup>30</sup> Loretto, P. (2017, May 2). *Qualities to Look for in a Mentor*. The Balance Careers. <https://www.thebalancecareers.com/top-qualities-of-a-good-mentor-1986991>

<sup>31</sup> Loretto, P. (2017, May 2).

should possess the skills necessary for constructive dialogue and feedback with mentees. This prevents the repetition of “mentee missteps,” or common self-destructive mistakes.<sup>32</sup> The role of the mentor in the director onboarding context means making an important commitment to the acclimation of the incoming director. The mentor must follow up with the mentee after giving constructive feedback to ensure the new director fully understands what is expected of them.<sup>33</sup>

### 3. Meetings

One-on-one meetings with the CEO, CFO, the CRO (Chief Risk Officer or the equivalent), leaders of operations, marketing, and HR are crucial in the initial weeks of director onboarding.<sup>34</sup> Such meetings are valuable socialization tools that inform the new director about the tone and culture of the organization, the strengths and weaknesses of the board, and candor of communications between management and the board, and among directors.<sup>35</sup> These one-on-one meetings are necessarily formal, although informal get-togethers with the full board have their place in introducing the new director to boardroom dynamics, board culture, and the backgrounds and perspectives of other directors.<sup>36</sup>

Senior board members and executives should encourage the incoming director to attend all committee meetings, regardless of the incoming director’s particular area of focus. Some boards invite new directors to attend all committee meetings during their first year of board service to help new directors gain a full understanding of the range of issues facing the company.<sup>37</sup> Attendance at committee meetings, therefore, familiarizes the new director with their own committee assignments, and provides an introduction to the company and the risks it faces as a whole.<sup>38</sup>

Of course, even in the most ideal circumstances, getting busy individuals to give up time and energy to attend committee meetings can be a chore. People tend to avoid and disregard even mandatory meetings for a variety of reasons, so having practical means of encouraging meeting attendance

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<sup>32</sup> Chopra, V., & Saint, S. (2017, July 24). *6 Things Every Mentor Should Do*. Harvard Business Review. <https://hbr.org/2017/03/6-things-every-mentor-should-do>

<sup>33</sup> Ryan, E. (2020, February 21). *Being Intentional with Your Mentoring Time* - — *Mentorloop*. Mentorloop Mentoring Software. <https://mentorloop.com/blog/intentional-mentoring-time/>

<sup>34</sup> Spencer Stuart. (2018).

<sup>35</sup> KPMG. (2019, March 26).

<sup>36</sup> Spencer Stuart. (2018).

<sup>37</sup> Katz, D. A., McIntosh, L., Wachtell, Lipton, Rosen & Katz. (2019, March 29).

<sup>38</sup> Katz, D. A., McIntosh, L., Wachtell, Lipton, Rosen & Katz. (2019, March 29).

will go a long way in the onboarding process. The easiest, and most obvious method, is to publish the starting and ending times of the meeting, and make a point of sticking to the scheduled times.<sup>39</sup> Additionally, including a meeting agenda in the same memo or email used to invite participants to the meeting makes attendees more likely to understand and appreciate their role at the meeting, and giving attendees extra time to prepare makes the actual meeting progress smoothly and quickly.<sup>40</sup> Encouraging meeting attendance generally comes down to using different means of motivating new directors, but attendance is the bare minimum. The real goal is active participation. In the next section, we explore ways in which onboarding organizers can proactively motivate new directors through the duration of the onboarding process, producing active participation and the most effective director performance.

### C. Motivation

Motivation, in the context of director onboarding, means effectuating within the director a sense of personal identification with the organization's purpose.<sup>41</sup> No matter how thorough an onboarding program is, a director must be properly incentivized in order to perform effectively. In the for-profit context, board directors may be substantially motivated by financial gains. This is not so in the case of non-profit organizations, where it is important to motivate incoming directors through other factors. However, motivational techniques traditionally found in non-profit literature can further incentivize for-profit directors, and should be applied during and beyond the onboarding process of any organization. In this section, we discuss two motivational techniques any organization can implement in their onboarding process with the purpose of encouraging director autonomy.

#### 1. Stay Mission-Oriented

From the outset of the onboarding process, the executive team, onboarding organizers, and senior board members must clearly identify the organization's mission to the incoming director. The executive team must ensure that the new director is aware of how their work contributes to the

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<sup>39</sup> White, M. G. (n.d.).) *Ways to Get People to Attend Business Meetings*. LoveToKnow. <https://business.lovetoknow.com/business-communications-sample-letters/how-have-virtual-meetings>

<sup>40</sup> White, M. G. (n.d.).)

<sup>41</sup> MacDonald, G. (2017, March/January 16). *Motivating Board Members: It's Complicated*. *board members: it's complicated*. Governing Good. <http://www.governinggood.ca/motivating-board-members-its-complicated/>

mission's success.<sup>42</sup> Moving forward, the mission should be central to all board meetings and program and policy discussions.<sup>43</sup> Involving the new director in as many programs and activities as possible in the first months of their employment will highlight the mission's place in the organization's day-to-day operations, helping the director internalize the mission and apply it to their work moving forward. That said, it is paramount that the mission be articulated and expressly aligned with the day-to-day work of the board.<sup>44</sup>

Staying mission-oriented is a concept equally applicable to for-profit and nonprofit organizations alike. Traditionally a facet of nonprofit literature, today many for-profit organizations categorize themselves as "mission-driven." Indeed, some experts indicate that any organization *must* be mission-driven in order to produce the most proactive and engaged employees who will view their contributions to the organization more broadly.<sup>45</sup> A 2014 Gallup study found that mission-driven leadership was linked to greater *marginal* productivity in for-profit organizations.<sup>46</sup> Whether a given organization is for-profit or nonprofit, focusing attention on the organization's societal impact will help leaders make informed, strategic, and mission-oriented decisions.

It is important to note that "mission" refers to the organization's "why." It is the impact or difference the organization as a whole aims to make on society. Mission is closely related to the topic of the next section, "goals," which succinctly describe the organization's mission and values through director expectations.<sup>47</sup> Goals should be thought of as the short-term investments that further the interests of the organization's mission.

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<sup>42</sup> SkillGigs. (2016, December 29). *Ideas Onon How Toto Motivate New Employees - — Employee Onboarding*. SkillGigs. <https://www.skillgigs.com/ways-to-motivate-new-employees/>

<sup>43</sup> Richard Male and Associates. (n.d.). *20 Ways to Involve and Motivate Board Members*. (n.d.) Richard Male and Associates. <http://richardmale.com/20-ways-to-involve-and-motivate-board-members/>

<sup>44</sup> DuVal, D. (2019, October 31). *Staying Mission-Focused During Times of Change*. McKinley Advisors. <https://www.mckinley-advisors.com/blog/staying-mission-focused-during-times-of-change/>

<sup>45</sup> Mullen, L. (2019, November 5). *Write a Mission Statement for Your For-Profit Company*. Prosper Strategies. <https://prosper-strategies.com/for-profit-mission-statement/>

<sup>46</sup> Groscurth, C. (2020, May 14). *Why Your Company Must Be Mission-Driven*. Gallup. <https://www.gallup.com/workplace/236537/why-company-mission-driven.aspx>

<sup>47</sup> Duggan, T. (2018, April 13). *Examples of Corporate Goals*. AZCentral. <https://yourbusiness.azcentral.com/examples-corporate-goals-14839.html>

## 2. Goal Setting

Goals are targets set by an organization as specific, quantifiable outcomes that it commits to attain in order to achieve its mission and objectives.<sup>48</sup> It is no secret that goal setting has a beneficial impact on productivity. Psychologists acknowledge that having a set of goals to work toward helps guide focus and develop strategies to enable performance at the requisite level.<sup>49</sup> Indeed, setting goals in the workplace is an optimal component of employee motivation, and the board room is no exception.<sup>50</sup> Goal setting produces an atmosphere of innovative thinking and collaboration that motivates team members to do their jobs as effectively as possible as they grow to understand that their contributions matter to the goal's achievement.<sup>51</sup>

Any organization onboarding a new director should bear in mind, as a priority, the importance of communicating goals clearly linked to the success of the organization. Of companies with effective performance management systems, 91% say that goals are linked to business priorities. The reason for the effective performance is that individual employees are more motivated to achieve if they can see how their individual goals fit into the big picture.<sup>52</sup> When onboarding a new director, it is paramount that they grasp as quickly as possible the company's culture and where they fit in the achievement of the organization's mission. Clear, concise, and business-prioritized goal setting can help facilitate each of these critical onboarding components.

Onboarding organizers must operate with the intention that incoming directors be comfortable setting goals for themselves as quickly as possible. Director onboarding is, in essence, a process designed to allow the

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<sup>48</sup> Writing Help Center. (n.d.). *How To Write Corporate Goals*. Writing Help Center. <http://www.writinghelp-central.com/corporate-goals.html> *A Corporate Goal Is a Specific Target Set by an Organization*. How to Write Corporate Goals. (n.d.) <http://www.writinghelp-central.com/corporate-goals.html>.

<sup>49</sup> Riopel, L. (2020, April 26). *The Importance, Benefits, and Value of Goal Setting*. Positive Psychology. <https://positivepsychology.com/benefits-goal-setting/>

<sup>50</sup> Parks, A. (2014, October 30). *Motivation in the Workplace: The Value of Setting Goals*. TEDS. <http://blog.teds.com/motivation-in-the-workplace-the-value-of-setting-goals> People Resource Planning—A TEDS Blog. <http://blog.teds.com/motivation-in-the-workplace-the-value-of-setting-goals>.

<sup>51</sup> Parks, A. (2014, October 30).

<sup>52</sup> Chowdhury, S., & Hioe, E. (2017, December 27). *How Effective Goal-Setting Motivates Employees*. effective goal-setting motivates employees. McKinsey & Company. <https://www.mckinsey.com/business-functions/organization/our-insights/the-organization-blog/how-effective-goal-setting-motivates-employees#>



incoming director to internalize the organization's mission and set personal goals in accordance with the organization's direction. Director autonomy, or the freedom of external control, enables new directors to take charge of their transition and manage their day-to-day operations.<sup>53</sup>

### 3. Moving to Greater Autonomy

Director autonomy comes directly from the organization's board culture. It is the freedom of directors to think for themselves, to make decisions independently, and to "own" their roles.<sup>54</sup> Ultimately, the purpose of a thorough onboarding program is to set up a new hire to effectively work on their own.<sup>55</sup> An incoming director's position is inherently one that they must be trusted to fill, or else they would not (or should not) have been hired. Moving toward autonomy, and thus the natural end of the onboarding process, really finds its roots in the beginning: recruiting potential directors with the right mindset and attitude, who thrive on their own initiative and innovation.<sup>56</sup> Self-direction is at the core of humankind's natural inclination, so it makes sense for executives to motivate incoming directors through "autonomy support," or giving the director the appropriate flexibility and choice, when possible, to engage in business-prioritized work that mirrors personal values and interests.<sup>57</sup>

There are several practical ways to promote autonomy in the boardroom, but the first step is always creating a culture of trust. Senior board members or executives must consult the new director on projects and tasks, allowing trust to grow and new ideas to emerge.<sup>58</sup> Consultations of this sort manifest as inviting directors to share their thoughts and feelings on various work activities, demonstrating patience and providing time for self-learning, and providing meaningful information and feedback regarding choices.<sup>59</sup> This

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<sup>53</sup> Simmons, G. (2019, August 29). *Want Onboarding That Drives New Hire Productivity?* TiER1 Performance. <https://tier1performance.com/onboarding-and-new-hire-productivity/>

<sup>54</sup> Lee, D. (2019, May 8). *For More Motivated, Engaged Employees, Give Them More Autonomy.* TLNT. <https://www.tlnt.com/for-more-motivated-engaged-employees-give-them-more-autonomy/>

<sup>55</sup> *Ideas on How to Motivate New Employees—Employee Onboarding.* SkillGigs. (2016, December 29).

<sup>56</sup> Harriss, L. (2019, September 24). *Why job autonomy is vital* Job Autonomy Is Vital for success – and how Success—And How to encourage it. CIPHR. <https://www.ciphr.com/advice/employee-autonomy/Encourage It.https://www.ciphr.com/advice/employee-autonomy/>

<sup>57</sup> Stone, C. (2020, May 7). *Examples of Autonomy In Thein the Workplace & How Toto Get More Of of It .* GQR. <https://www.gqrgm.com/examples-of-autonomy-in-the-workplace-how-to-get-more-of-it/>

<sup>58</sup> Harriss, L. (2019, September 24).

<sup>59</sup> Stone, C. (2020, May 7).

type of communication produces a cycle of autonomy and motivation: trusting a director to make good decisions and contributions motivates the director to step into that role and add value, which in turn furthers the organization's initial vote of confidence, triggering intrinsic motivation to continue adding value.<sup>60</sup>

Motivation is no easy task when onboarding under normal circumstances, and the barriers created by an online format will only increase the difficulty. As all facets of business move online as a result of the coronavirus, it is important for business leaders and onboarding organizers to be mindful of what made things work before the crises and attempt to implement similar methods online. The next section focuses on how to apply the key components of corporate onboarding in an online, post-COVID era.

### **III. How to Move Onboarding Online**

When the novel coronavirus promoted a worldwide economic shutdown, many businesses were forced to continue operating online. The experience was trying, and some firms failed this stress test.<sup>61</sup> But this disaster also prompted many to think critically about many aspects of life to determine which activities are essential. Many reconsidered how to go about these activities differently. The silver lining is that the pandemic revealed myriad ways to go about things more efficiently. Necessity is the mother of invention—and that invention can be useful even after it is no longer necessary.

This section will discuss how to succeed in the essential activity of onboarding new corporate directors when in-person meetings are impossible. But the advice herein is not limited to these trying times. Rather, some or all of these techniques can be implemented for in-person onboarding, too. By drawing comparisons between how things were done before and how things are done in the new normal, this Essay highlights how all of these processes can be improved.

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<sup>60</sup> Nielson, C. (2020, June 16). *Autonomy: Empowering the Individual to Do Their Best Work*. DecisionWise. <https://decision-wise.com/autonomy-empowering-the-individual-to-do-their-best-work/>

<sup>61</sup> Indiana Lawyer Staff. (2020, March 14). *One of City's Largest Law Firms Closes Offices Amid Coronavirus Concerns*. city's largest law firms closes offices amid coronavirus concerns. Indianapolis Business Journal. <https://www.ibj.com/articles/one-of-citys-largest-law-firms-has-closed-its-offices-amid-coronavirus-concerns>



### **A. Provide Information Ahead of Time (The Flipped Boardroom)**

Traditional in-person onboarding often occurs at a one half- or full-day retreat. But online onboarding need not be so sharply time-bound. Instead, online board education can occur over a longer period of time. Moreover, board members can learn at their own pace. This self-paced learning is especially useful where board members have different backgrounds, expertise, and experience levels with corporate governance in general and this corporation in particular. By giving board members information ahead of time, organization leaders can shorten the live portion of online onboarding. This makes planning easier for busy executive schedules while making learning more effective and efficient.

Presenting information ahead of time is part of a tried-and-true pedagogical method called “flipping the classroom.” In a standard classroom, information is presented in class. In a flipped classroom, information is presented before class, thus freeing up class time for discussions, problem solving questions, group work, and other engaging learning activities. This has been shown to be more effective than lecture as measured by students’ long-term retention and comprehension of material.<sup>62</sup>

This Essay suggests that “flipping the boardroom” can be equally effective for onboarding directors. This requires onboarding organizations to be strategic and deliberate about creating informative learning resources and engaging the board in active learning exercises, but the investment will pay dividends over time. A flipped onboarding program will generate efficiencies in board member time and retention of key information—and flipped programs are more fun and engaging for participants, too.

### **1. Create a Virtual Data Room**

The online analog to the physical data dump—which often amounts to little more than giving new directors reams of information in three-ring binders—is a virtual data room (VDR). Put simply, a VDR is a digital space where files are organized and stored. When properly implemented, data rooms have many advantages for the conveying of generic information to several new directors at once. VDR may be more secure, more affordable, and easier to set up and use than the traditional data dump. Onboarding organizers should consider employing a VDR even after it becomes an option again to hand a new director a towering stack of paper.

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<sup>62</sup> Mihai, L. (2017, October 11). *8 Flipped Classroom Benefits Forfor Students Andand Teachers*. eLearning Industry. <https://elearningindustry.com/8-flipped-classroom-benefits-students-teachers>

VDR can be made very secure. Professional solutions offer 256-bit AES encryption and various data center certifications.<sup>63</sup> More modest security needs can be met by common enterprise apps like Box.<sup>64</sup> On a small scale, or when information is not competitively sensitive, users can create VDR environments in free apps like Dropbox.<sup>65</sup> VDR administrators can even prevent viewers from downloading, printing, or even taking screenshots of highly sensitive information. Access can be controlled remotely and in real time—which can be useful for offboarding as well.

VDR is affordable. An annual subscription to Box can cost less than professionally printing and shipping just one dozen onboarding information binders.<sup>66</sup> While professionally managed high-security VDR platforms are available for high-end customers, most organizations can simply administer their own onboarding VDR using already established corporate cloud solutions like Box, Google Drive, Microsoft OneDrive and others.

VDR is easy to set up and use. Data rooms function like hard drives on a computer. Documents can be organized just as they would be in printed tabbed binders, or new organization can be applied using app features like hashtags and comments. In addition, VDR hosts large Excel spreadsheets, high-resolution graphics, video clips and other hard-to-print items. This creates new opportunities to explain and personalize onboarding information, even before the live onboarding event begins. The next section will discuss how to create personalized content that will engage new board members with the significant work of absorbing corporate information.

## 2. Tailor VDR Content

VDR enables video and other interactive content to be shared with new directors in advance of the onboarding program. This creates new opportunities to begin the onboarding learning process in advance of a live meeting, enabling a more swift and efficient live session that reduces “Zoom fatigue” and enhances learning and engagement.

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<sup>63</sup> Patel, K. (2020, June 12). *The Ultimate Guide to Virtual Data Rooms (VDRs)*. DealRoom. <https://dealroom.net/faq/what-is-virtual-data-room> (n.d.) <https://dealroom.net/faq/what-is-virtual-data-room>

<sup>64</sup> Box Support. (n.d.). *Enhanced Security*. Box. <https://support.box.com/hc/en-us/articles/360043693854-Enhanced-Security> (n.d.) *Enhanced Security*. Box Support. <https://support.box.com/hc/en-us/articles/360043693854-Enhanced-Security>.

<sup>65</sup> Fazackarley, J. (2018, October 30). *File Sharing via Dropbox or a VDR: What's What's the Difference?* Deal Making Wire. <https://www.idealsvdr.com/blog/virtual-data-rooms-file-sharing/>

<sup>66</sup> Pardo-Bunte, M. (2019, June 2412). *Box Pricing: Features, Costs and Top DMS Alternatives*. Better Buys. <https://www.betterbuys.com/dms/box-pricing/>

Tailoring VDR content means creating videos that personally introduce the corporation's new board members to the institution, first, and then to the onboarding environment. Corporations with sufficient resources should record a tightly edited two- to five-minute video that briefly welcomes the new director to the board, then explains the organization and intentionality behind the data room. Directors must be given clear direction about which files and folders to review carefully, and which are meant to be skimmed as background or merely maintained for reference.

VDR personalization is also an opportunity for the corporation to show its new directors that they are valued. For example, the CEO may record a 30-second personal address to each new member, followed by a 2-minute description of the VDR from the CFO.

The VDR content itself can also be customized for specific directors or groups of directors. For example, a folder with information about executive compensation can be shared only with new directors who are assigned to serve on the compensation committee. In this way, both enhanced security and a more tailored and streamlined user experience can be achieved online.

### **3. Engage!**

Receiving huge reams of information can be boring or overwhelming, whether in binders or online. To avoid information overload, design learning activities that engage the new directors in learning about the most important information. This section will introduce how learning activities are offered ahead of the meeting to complement a data dump, and ensure that data is processed by the new directors so they acquire information efficiently. The next part will focus on how to reinforce information acquisition at the live session. Once again, we can draw upon classic pedagogical tools to engage adult learners: the Testing Principle and Learning by Doing.

The Testing Principle states that people learn better when they take a practice test on the material rather than restudy it.<sup>67</sup> The idea is that the test primes the mind for learning the material, much like a warmup primes the body for a workout. Depending on corporate culture, however, it may not be appropriate to give new directors a pop quiz. Instead, onboarding organizers

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<sup>67</sup> Mayer, R. E. (2011, January 16). *Applying the Science of Learning to Undergraduate Science Education*.  
[https://sites.nationalacademies.org/cs/groups/dbassesite/documents/webpage/dbasse\\_072589.pdf](https://sites.nationalacademies.org/cs/groups/dbassesite/documents/webpage/dbasse_072589.pdf)

can achieve the testing effect though more conventional means, as discussed below.

Learning by Doing means learning from experiences resulting directly from one's own actions, as contrasted with learning from watching others perform, reading others' instructions or descriptions, or listening to others' instructions or lectures.<sup>68</sup> Although a director may access a vast amount of information by getting access to a VDR, the director will not automatically become familiar with how to access specific information or may not even be aware of what information is in the VDR. To accelerate directors' familiarity with important information, onboarding organizers should encourage directors to explore and use the VDR.

Instead of a formal quiz, present the directors with a checklist that sets forth tasks that require each new director to explore the VDR. For example, if the VDR employs tags, ask each director to identify which tags correspond to their expertise. This requires the director to learn how to use tags in a VDR while providing the corporation with actionable information about director expertise.

Videos may facilitate learning by doing. Consider making a video that shows the directors how to use VDR features (like tagging files), and then make that video available in the VDR so directors can reference it when going about their tasks. These videos thus serve the additional purpose of "flipping the boardroom." By covering low-level information like this before the directors' first meeting, onboarding organizations can make the meeting more efficient and focused on high-level understanding.

Directors should also complete a brief survey during their pre-meeting learning time. The survey should ask questions that aim to reveal the directors' skill set and interests. This information will help onboarding organizers plan the upcoming meeting. As discussed in the next section, the online meeting should be tailored to meet the needs and skills of the incoming directors.

Offer a checklist of key information to be learned in advance of the meeting. This is also the first opportunity to set the tone<sup>69</sup> as goal oriented.<sup>70</sup> A task list or agenda for the upcoming live onboarding meeting also clues in

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<sup>68</sup> Reese, H. W. (2011). *The Learning-By-Doing Principle*. Behavioral Development Bulletin. <https://psycnet.apa.org/fulltext/2014-55719-001.pdf>

<sup>69</sup> INFRA

<sup>70</sup> INFRA

directors as to what they will be required to know. Organizers should endeavor to connect the introductory checklist, the VDR activities, and the meeting agenda so that directors intuit the value of preparing for the meeting by exploring the VDR.

### **B. Host a Virtual Meeting**

Onboarding generally requires a meeting. There are aspects of the onboarding experience, such as socialization, that cannot be readily accomplished on one's own time. The meeting traditionally occurred in person as a half-day or full-day retreat. But an in-person retreat may be impossible or impracticable. For example, governments prohibit large in-person gatherings due to the COVID-19 pandemic. But even when in-person meetings are possible, are they the optimal use of corporate resources? In some cases, such as where directors live far from corporate headquarters, or where the corporation lacks the funds to host a day-long event, a virtual meeting may be a good substitute.

Virtual meetings can be buggy and boring. But careful planning and strategic use of online meeting technology can result in a great experience for new directors. Once again, onboarding organizers need to think like online educators. Here are some tips and tricks from the online law professor's playbook that are sure to engage board members in active learning and socialization.

#### **1. Plan a Plenary Session**

Plenary sessions—where all board members and executives are to attend—are a great opportunity to kick off the onboarding experience with motivation and energy.<sup>71</sup> They are especially helpful in online onboarding. The plenary session is the organization's opportunity to introduce substantive goals, handle technical concerns, and set the tone for the meeting and the work going forward.

There are many different formats for plenary sessions, but a good rule of thumb is to keep them short. To give people time to log on and work out any technical issues, plan to spend the first ten minutes or so in an unstructured format. Ask the directors to turn on their microphone and webcam and briefly introduce themselves as they enter the meeting. This

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<sup>71</sup> Hard, R. (2019, August 10). *Why Conferences Begin With A Plenary Session*. The Balance Small Business. <https://www.thebalancesmb.com/why-conferences-begin-with-an-opening-general-session-1223626> (n.d.) <https://www.thebalancesmb.com/why-conferences-begin-with-an-opening-general-session-1223626>

will reveal any audio and video problems. During this introductory time, display a slide that provides the agenda and other key information while organizers communicate one-on-one with any directors who are having trouble with connectivity. Wise conference organizers will have alternative contact information (such as a cell phone number) so they can reach directors and help them get online before the conference begins.

After any technical bugs are worked out, the plenary session can proceed much as it would in real life. Usually, the CEO or Chair of the Board makes brief welcome remarks to kick off the event. The master of ceremonies, who may be the CEO or the conference organizers, should explain how the rest of the event will work. Creative organizers might also use the plenary sessions to demonstrate how the breakout groups, discussed below, will operate.

The plenary session is a good time to introduce the new directors to each other. An effective way to do this while highlighting positive attributes of the incoming team members is to discuss the skills and interests that were highlighted by the survey that was discussed in the prior section.

## **2. Break Out for Active Learning**

Depending on the size of the incoming class of directors, it may be necessary to break up into smaller groups. Online meeting attendees tend to participate less frequently in large groups than small ones. Large groups are hard for online presenters to monitor. Larger groups tend to have more problems with microphones being off mute and disruptive background noise. When more people are added to an online conference room, each person's image gets smaller, and some software cannot display more than a certain number of attendees at one time. Seeing one another is an important aspect of socializing new team members, and this is lost when the group is too large. Limit groups to ten or fewer members.

Each group or cohort can rotate through four or five learning stations. Each station will cover a different topic and should be facilitated by the key institutional person for that knowledge domain. For example, the general counsel may lead a discussion on fiduciary duties, while the Chief Financial Officer reviews accounting basics. By using breakout rooms on virtual meeting software such as Zoom, these learning stations can occur simultaneously for maximum efficiency.

Onboarding organizers should make these breakout sessions as interactive as possible. This can be accomplished in many ways. A popular teaching

device for adult learners is called the Socratic method. In this method, the discussion leader will ask questions to various participants. The questions are designed to lead the participants to identify, understand, and analyze issues that may arise during their tenure as board members. If the groups are small enough, the discussion leader should be able to call on each attendee during the breakout group. This keeps attendees mentally engaged and attentive.

Keeping the breakout groups short is key to their success. Although the techniques discussed in this section help to engage adult learners online, attendees will still experience “Zoom fatigue.”<sup>72</sup> Ideally, breakout activities are limited to about 20 minutes, and then five minutes should be provided for questions and answers and another five for an off-camera comfort break. In this manner, six training activities can be completed within three hours.

If the corporation needs certain directors to specialize on certain functions, such as accounting professionals serving on the audit committee, then the breakout rooms can be designed accordingly. Members of the audit committee should be grouped as a cohort that attends a session on advanced accounting, while the rest of the class may not need to attend that session.

As for which topics to address in breakout sessions, these are the same important topics for new directors to discuss during in-person sessions. Corporate needs will vary, but the following are generally regarded as important aspects to cover:

- Corporate Governance and Fiduciary Duties
- Accounting and Finance
- Operations
- Products, Services, Customers, and Chief Competitors
- Acquisition Strategy
- Risk Management<sup>73</sup>

The breakout sessions should deliberately be designed to be relatively fast paced. Shifting between concept areas and having new discussion leaders every thirty minutes or so will help keep directors engaged in learning their new role and stave off Zoom fatigue.

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<sup>72</sup> Fosslien, L., Duffy, M.W. (2020, April 29). *How To Combat Zoom Fatigue*. Harvard Business Review. <https://hbr.org/2020/04/how-to-combat-zoom-fatigue>

<sup>73</sup> KPMG. (2019, March 26).

### **3. Come Together for Hot Topics**

After the breakout sessions are complete, bring the group back together for a final all-hands session. Accomplish this technically by setting all the breakout rooms to expire simultaneously, returning all members to the main virtual room for concluding remarks. This last session is the organizer's best opportunity to motivate the directors to succeed in their new role and to begin the socialization process.

One way to achieve this is to hold a discussion on hot topics. The CEO or Chair of the Board can raise an issue that currently and substantially impacts the corporation, and then ask the new board members to discuss it. This experience should resemble a mock board meeting, except that mundane and dull topics that must be handled in real board meetings should be excluded from the hot topics sessions. The CEO or Chair should establish that the goal of the meeting is to come up with action-oriented resolutions to deal with the issue, and then he or she should facilitate the conversation.

Facilitating a conversation among a large group of online attendees can be challenging (hence the suggestion for breakout rooms above) but learning how to do so effectively is an important skill for organizational leaders in this online era. Online onboarding thus became an opportunity for existing leadership to extend their skill set.

If the breakout sessions went well, the new directors should be warmed up and ready to engage in dialogue. If the group contains less than about 30 members, the online host may ask people to virtually raise their hands and be called upon, at which point the attendee should unmute their microphone and speak their point to the group.

When online groups are larger than about 30 members, it becomes harder to manage the raise hands function. Instead, the chat function is the best way to gather input from a large number of people in an online meeting. Participants can chat to everyone and thus express their views in writing, or they can chat to the host and ask him or her to recognize the speaker or to read the comment aloud.

However, the host manages participation in the meeting. The host should keep the meeting focused, short, and goal oriented. The hot topic must be straightforward enough that it can be communicated and discussed within about a half hour. The host should start to wrap up the discussion at least ten minutes before the end of the allotted time period so he or she can



express the emerging consensus of the group and effectuate it by writing up a resolution. The meeting should conclude with a yay-or-nay vote on the resolution, using the polling feature in the video conferencing software. In this way, the group will learn how to be an effective online board member by actually practicing the process. Staying goal oriented and accomplishing the stated objective provides a positive model for an effective meeting that the new board members will carry forward into their future work for the corporation.

After the issue is resolved, the CEO or Chair should take a few minutes to amplify the importance of the Board in accomplishing the organization's goals. This is also the opportunity to inspire the directors to greater service by discussing how the organization can make a significant positive impact on society. Remember that the directors have just succeeded in tackling a major issue of concern, so this is the moment to reinforce the message that the board can and will accomplish major strategic goals.

In order words, inspire them to create connections before opening up the meeting for relatively unstructured social time. Make concluding remarks timely, brief, and positive—a call to action and inspiration: We will lead this organization through any adversity! Hopefully, that inspiration will encourage directors to converse about how to advance corporate goals during that unstructured socialization period.

### **C. Socially-Distant Socialization**

Most in-person onboarding retreats offer many opportunities for new and old board members and corporate leadership to get to know each other.<sup>74</sup> These social interactions are not as easy to cultivate online. But there are several strategies to help start the socialization process with new board members online.

#### **1. Virtual Happy Hour**

In-person meetings typically conclude with a happy hour. This social event can be brought into the online space. Consider physically mailing each of your directors a commemorative glass that features the corporate logo and arrives before the in-person meeting. Depending on state liquor laws, the corporation might also include a small bottle of wine. Directors will be pleased to receive gifts, and they can be employed to enhance the social atmosphere and the feeling of community.

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<sup>74</sup> Basta Pasta. (2018, January 26). *4 Benefits of a Corporate Happy Hour*. Basta Pasta. <https://www.bastapastamd.com/blog/4-benefits-corporate-happy-hour/>

At the conclusion of the hot topics sessions, the Chair can kick off the happy hour by inviting all attendees to grab their glasses and join in a virtual toast online. Attendees fill their glass with their beverage of choice. The experience of all drinking from the same glass, so to speak, despite being separated in space provides a team atmosphere of a common community.

What happens after the toast depends on the size of the group. If the group is relatively small, the host can stimulate conversation by asking casual questions and continuing to keep the conversation going until the appointed time for the conclusion of the happy hour. If the group contains more than about a dozen people, however, conversation and socialization may be better served by the host playing matchmaker.

## **2. Pair and Share: Play Matchmaker**

Pair and Share is a pedagogical term for the practice of organizing students into small groups and giving them discussion questions to resolve. This same concept can be applied strategically to online onboarding. When members have similar interests, the host can play matchmaker and group them in a small breakout room to meet and greet during the virtual happy hour. Encourage three to four members to discuss a topic related to their board function while hoisting a glass “together.”

The survey described earlier can be a good source of information about directors’ interests that can be applied here to pair directors who are likely to have commonalities. Posing discussion questions to each small group can help spark conversation about those interests. One can never guarantee that two people are going to connect, but a carefully planned group of three or four directors who are selected for their common interests and given an on-point discussion question is likely to result in worthwhile conversation and connections.

Consider inviting existing directors and leadership staff to the virtual happy hour. Staff members can each be responsible for connecting a small group of directors. If the corporation has a staggered board, or a board made up of different classes of directors that serve different term lengths and are elected at different times of the year,<sup>75</sup> having both new and existing directors helps integrate new board members. Pairing directors in this way also may lead to

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<sup>75</sup> UpCounsel. (n.d.). *Staggered Board: UpCounsel 2020*. UpCounsel.  
<https://www.upcounsel.com/staggered-board>

organic mentor-mentee relationships. For suggestions on how to stimulate these relationships, see the next section.

### 3. Mentor-Mentee Pairs

In the real world, directors with common interests may simply find each other during happy hour and strike up a conversation organically. Unfortunately, it is not easy for online meeting attendees to self-select their happy hour group on the spot. But empowering directors to select a mentor or mentee, and then putting those mentor-mentee pairs into the same happy hour group, can be an effective way of jump-starting a long-term relationship.

Although the effectiveness of corporate mentoring programs is unclear,<sup>76</sup> research shows that board members benefit both from mentoring and becoming a mentor.<sup>77</sup> There are several purposes for corporate mentoring programs, including leadership development.<sup>78</sup> Setting up mentor-mentee pairs that match new and existing directors can improve director retention and deepen both mentor and mentee leadership strength. Mentorship programs may especially help develop female leaders.<sup>79</sup> Improving diversity on corporate boards is just one of many reasons why an effective mentorship program can improve corporate leadership.

Online mentoring, also called e-mentoring, has grown in popularity over the last 20 years.<sup>80</sup> In older e-mentoring programs, the mentoring was delivered asynchronously, via email, message board, chat, or text functions.<sup>81</sup> More recently, massive multiplayer online games such as Second Life have created virtual spaces where mentoring takes place.<sup>82</sup> If that sounds too futuristic and far out for your board members, do not be concerned. E-

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<sup>76</sup> For a thorough analysis of whether and when corporate mentoring programs are impactful, see Christina M. Underhill, [The Effectiveness of Mentoring Programs in Corporate Settings: A Meta-Analytical Review of the Literature](#), 68 J. Vocational Behavior 292-307 (2006); for a more anecdotal approach, see Mel Jones, [Why Can't Companies Get Mentorship Programs Right?](#), The Atlantic (June 2, 2017).

<sup>77</sup> David F. Melcher and A. John Procopio, Board Members Benefits from Becoming Mentors, Harvard Business Review (Dec. 16, 2014)

<sup>78</sup> Chronus, [The Top 5 Workplace Mentoring Program Types](#), Chronus.com

<sup>79</sup> Chrystal Turner-Moffatt, The Power of Mentorship: [Strengthening Women in Leadership Roles](#), 64 Professional Safety 17-19 (2019)

<sup>80</sup> National Mentoring Institute, [E-Mentoring](#).

<sup>81</sup> Id.

<sup>82</sup> See Christopher Langston, Nathan Moon, Robert Todd, Noel Gregg, and Gerri Wolfe, [Leveraging Virtual Worlds for Electronic Mentoring](#), Universal Access in Human-Computer Interaction, Access to Learning, Health and Well Being 137-148.

mentoring can occur in much more familiar ways, such as on Zoom web conferencing or even via phone calls.

To facilitate the development of mentoring relationships between new and existing board members, the first step is to think carefully about establishing pairs that are likely to be compatible. Organizers can accomplish this by asking the directors to take a DISC assessment, which reveals “how” a person does what they do.<sup>83</sup> To keep mentors and mentees engaged, try pairing them up based on their DISC styles.<sup>84</sup> You might also pair based on skill set and common interests, but this may lead to the pitfall of mistaking superficial similarities such as a shared interest in golfing for a deeper foundation on which to build a long term relationship of trust and confidence.

However, onboarding organizers establish mentorship pairs, they should remember that online interactions require much more deliberate forethought. At an in-person happy hour, directors might circulate among each other until pairs click, forming natural and unofficial mentoring relationships. This does not happen as easily online (unless the directors are all hanging out together in Second Life during their free time), so a deliberate effort to pair the right people at the right time is essential to getting a director mentoring program to work well. If an organizer follows the suggestion above about having a virtual happy hour, consider using breakout rooms during the happy hour to introduce the mentor-mentee pairs to each other.

#### **IV. Conclusions**

Moving director onboarding online presents new challenges. But the inability to meet in person should not prevent corporations from moving forward with vital processes such as onboarding. This Article has shown how essential components of the onboarding process are translated to the online format. Moving onboarding online may also be preferable in some respects due to greater efficiency and sustainability. Even after the existential threat posed by the novel coronavirus has passed, replacing three-ring binders with VDRs and holding meetings through Zoom may become more commonplace. Online alternatives offer greater flexibility in the onboarding process, making the move toward greater autonomy more organic.

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<sup>83</sup> TTI Success Insights, [Mentoring Using DISC](#) (Feb. 27, 2019)

<sup>84</sup> TTI Success Insights provides suggestions for pairing up mentors and mentees based on DISC styles on their web site, [Mentoring Using DISC](#).

While nothing can replace the comradery of meeting for a casual drink at the local bar, online team building exercises like virtual happy hours and matchmaking must fill the socialization role for the time being. At the very least, it will familiarize the new director with other members of the board in advance of work resuming in person. It will be difficult for new directors to navigate the ins and outs of the organizational culture through virtual communications. Onboarding organizers can, however, mitigate that difficulty by being attentive of the new board member's engagement during online team building exercises. Virtual communication may not ideal for all things, but an effective onboarding program will make the best of online technology.

In making the transition to online formats, onboarding organizers in the post-COVID-19 era must be adaptive. They must be prepared to deal with a process of trial and error, as all organizations are unique and there is no single, uniform onboarding program. By maintaining an open and adaptive state of mind and implementing the methods and techniques described in this Article, onboarding organizers can begin to shape a comprehensive online onboarding program that works for their organization.