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Holistic Onboarding of a Generation Y Team Member

Rebeca Peacock
Boise State University

Margie Ruppel
Boise State University

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Rebeca Peacock*

Albertsons Library
Boise State University
Boise, ID, US
rebecapeacock@boisestate.edu

and

Margie Ruppel

Albertsons Library
Boise State University
Boise, ID, US

Abstract

Onboarding a new faculty librarian should be done holistically, including integrating them into the organization and the team, and incorporating their individual strengths. Approaching onboarding holistically can improve team functionality in terms of communication, workflow, and strategic planning. This chapter focuses on one example: face-to-face onboarding of a new Generation Y instructional design librarian who joined the library at a medium metropolitan research university. Onboarding methods presented include formal campus orientations, weekly check-in meetings, a team building exercise, background information about the library and Instruction Team projects, and additional socialization strategies. A review of the relevant literature is included.

Keywords: onboarding, Generation Y, teams, holistic, librarian, Millennial, academic library

Introduction

Boise State University is a metropolitan doctoral research institution located in Boise, Idaho with a student population of over 23,000 and 728 full-time faculty (Boise State University, 2017). Boise is the fastest-growing city in the United States, according to Forbes magazine (Sharf, 2018). The city is attracting more and more young professionals as opportunities in higher education, engineering and technology flourish. In this promising but competitive environment, employers will want to explore all possible methods to recruit and retain these new employees. Onboarding includes all of the practices initiated by an organization necessary to facilitate these retention efforts by helping the new employee acclimate to a new organization (Klein & Polin, 2012). Therefore, the overall impact that onboarding must have on workplace planning is to increase retention by harnessing a carefully designed process suited for today's workforce (Abdallah, 2017; Hobbs, 2017).

Albertsons Library, at Boise State University, uses onboarding guidance from the human resources department and the provost's office to welcome new librarians. In addition, all faculty attend a New Faculty Orientation the week before classes begin and have the option to attend a general half day university orientation, called "ONE (Orientation New Employee) Boise State," which presents relevant information such as culture, shared values, branding, payroll, benefits, and holiday schedules. However, the Albertsons Library does not have its own defined process for onboarding librarians in the library. This prompted Margie, who was onboarding a team member for the first time, and Rebeca, to begin to document their process and reflections in order to make recommendations for future new hires at Albertsons Library.

Margie, the Instruction Coordinator, wanted to ensure that the new Instructional Design Librarian (Rebeca), was successfully integrated into the Instruction Team and Albertsons Library, so she researched best practices for onboarding, and found an overwhelming amount of advice. From this search, she realized how important it was to provide a holistic onboarding experience. One strategy for holistic onboarding that resonated, was to show Rebeca that the library valued her instructional design skills and to immediately provide her with opportunities to use these

skills (Keisling and Laning, 2016). At the same time, Margie was sensitive to the fact that the existing team members (including herself) had been doing instructional design activities and that these duties would need to be carefully transferred to Rebeca. Margie took all of this into consideration and customized the activities based on Rebeca's needs. Together, Margie and Rebeca decided to tailor the onboarding experience to the needs of a Generation Y employee and focused on making the onboarding experience holistic in nature.

Overall, Rebeca's onboarding experience included:

- Background Information about the Library and Instruction Team projects (Appendix A)
- Access to pertinent Google documents, Google sites, how-to video files, teaching materials, and shared network drives
- ONE Boise State orientation
- New Faculty Orientation
- Weekly check-in meetings with Margie
- Instruction Team activity for integrating new members (Appendix B)
- Happy hour with colleagues
- Rebeca talked about her instructional design projects at a work meeting

This chapter will cover a review of relevant literature in the field (on characteristics of Generation Y employees, holistic onboarding practices, and organizational socialization strategies), reflections on this particular onboarding experience, and recommendations for developing a more robust onboarding process at Albertsons Library

Literature Review

Generation Y Characteristics

The landscape in the workplace has been shifting in the past decade as Generation Y, also referred to as Millennials, have entered the workforce. Generation Y generally refers to individuals born in the early 1980s through 2000. Human resources literature characterizes these employees as giving high value to work/life balance, craving meaning in their work, desiring regular feedback, being very social, craving respect, wanting to have a voice, and needing information on demand (Brack and Kelly, 2012; Trapero et al., 2017). Other characteristics include being technologically savvy, self-confident and philanthropic (Ferri-Reed, 2013).

Onboarding should therefore cater to these characteristics and take a holistic stance, immersing new employees into "company history, vision, and culture" as well as including practical training (Shepherd and Findley, 2017, para. 12). Not only that, but it should be a process that can last for several months or up to a year, not merely a one-time event. Onboarding can actually begin as early as the recruitment phase (Graybill et al., 2013; Vargas, 2013). In fact, Lawson (2017) recommends a year long process whereby employees not only understand their role in the organization but also build community and create tailored personal development plans for their future. In addition, the employee should be included in the process and give input so that the onboarding process meets their specific needs (Tyler, 2013; Williams-Smith, 2017).

Holistic Perspective

Onboarding from a holistic perspective goes beyond the organization's needs to consider how the new employee's strengths and talents can significantly impact the organization. Rather than molding the new employee into the organization's existing culture and goals, holistic onboarding allows the opposite to occur: the new employee is brought into the organization to help create unique services, solutions, or products. In fact, when a new employee is encouraged to be their authentic selves, they will be more engaged in their work, which can lead to more agile, adaptable organizations (Cable, Gino, & Staats, 2013). J. M. Twenge (2006), in the book *Generation Me* explains that authentic self-expression is very important to Generation Y.

Newcomers and their supervisors can employ various strategies to deepen the synergy between the organization's needs and the new employee's strengths. One strategy is for the new employee and their supervisor to discuss the newcomer's career goals, unique strengths, and create job goals and learning outcomes together. Keisling and Laning's (2016) survey results of academic librarians led them to recommend that organizations should "explain to recently hired librarians and to their new colleagues what strengths led to their selection and create early opportunities to use them on high visibility, high priority projects" (p. 392).

In order to provide this desirable holistic experience, human resources literature suggests a variety of best practices for the onboarding process.

Best Practices for Onboarding Generation Y Employees

The practices described below are widely recognized in human resources trade literature. They are not uniformly adopted in the field, however, due, in part, to a lack of evidence-based empirical research (Klein and Polin, 2012).

1. Provide employees with the means and structure necessary for optimal work/life balance. During onboarding, supervisor and supervisee should discuss any modifications needed in their work environment or schedule, as well as any workstyle characteristics that may help the employee settle in easier (Stimpson, 2009).
2. Members of Generation Y tend to desire regular feedback on their performance: therefore, it is not wise to wait until a yearly review to provide it to them. It would be much better to set up regular check-in meetings from the start to reduce anxiety in the employee (Beus, 2017; Fenenbock, 2015; Petrucelli, 2017). In addition, employer expectations, assumptions and procedures should be spelled out for the employee in order to avoid confusion or misunderstandings (Zabriskie, 2016).
3. Meaningfulness in a job is important to the Generation Y employee and to that end, supervisors should help new employees develop personal plans for their development as well as support the growth of their personal identity (Cable, Gino, & Staats, 2013; Mossberger, 2017).
4. Provide self-directed and eLearning solutions to minimize the large amount of information generally provided at the start of an onboarding process aimed at getting employees up to speed. Instead, it works better to provide just-in-time access to policies, reports, data, etc., which will increase the likelihood that the employee will remember information as they will have more context, unlike on their first day (Fellache, 2017; Harris, 2012; McDonnell, 2017; Putre, 2015; Sujansky & Ferri-Reed, 2010; Walker, 2016; Williams-Smith, 2017).
5. Generation Y employees desire opportunities to mix and mingle with other staff and get to know people outside of their immediate team or unit. Many organizations provide employees with mentorship opportunities and the positive impact of these opportunities is evident in the literature (Neyer and Yelinek, 2011; Putre, 2015; Stimpson, 2009; Sujansky & Ferri-Reed, 2010; Williams-Smith, 2017). Putre (2013) describes "connection coaches" (para. 32) as an alternative to a traditional mentor who may be similar in age and experience to the new employee and thus, to some degree, more relatable. Fenenbock (2015, p. 29) describes a similar experience of "learning buddies" which help with acclimatization and the feeling of being welcomed.
6. All employees desire to be respected and valued in their work lives; however, it is very important to this generation and they wish to know that their input on decisions, processes and more is heard and taken into consideration (Gelinias & Brennan, 2017; Zabriskie, 2016). To that end, allowing employees to help plan their onboarding process can enhance their sense of value (Ferri-Reed, 2013; Williams-Smith, 2017).
7. Finally, transparency is important and the where's and why's should be available to employees when decisions that impact them are made (Bhatia, 2017; Williams-Smith, 2017).

While there are a variety of best practices, those practices that define organizational socialization have remained some of the most impactful on the onboarding process.

Organizational Socialization

Decades of psychology, sociology, and human resources research illuminates the fact that socialization is a primary factor in whether a new employee feels like they fit into a new organization, and thus, whether they plan to stay in their new position. The most cited definition of organizational socialization is from 1979: the “process by which an individual acquires the social knowledge and skills necessary to assume an organizational role” (van Maanen & Schein, p. 211). Chao (2012) highlighted the differences between onboarding and socialization: “in contrast to the term onboarding, the term organizational socialization (a) captures the broader learning and adjustment processes that individuals go through when they adapt to a new role, and (b) includes efforts on the part of both the organization and the individual” (p. 18).

Ashford and Nurmohamed (2012) discuss the importance of the socialization process:

There is something inherently interesting about the socialization process. Perhaps it is because we have gone through it at various times throughout our lives and can vividly remember the feelings of anxiety, hope, expectation, and joy that accompanied it. Perhaps it is because the importance of the process for organizations is so readily apparent... Or perhaps it is the tensions inherent in the process that make it so intriguing. The contrast between the organization’s desire to mold and shape individuals to gain efficiencies and organizational performance pressures that draw mentors’ time and attention away from the effort; between the individual’s desire to fit in and succeed, but also to maintain freedom and self-expression; or between the organization’s desire for increased conformity to gain efficiency and its simultaneous need for innovation and flexibility. (p. 8)

The socialization literature has focused on the actions of both the organization and the newcomer, the interactionist perspective, for the past thirty years (Reichers, 1987). Bauer and Erdogan (2011) defined organizational socialization as “a process through which new employees move from being organizational outsiders to becoming organizational insiders” (p. 51). Their summary process model of socialization illustrates that specific employee characteristics (such as openness) and proactive employee behaviors, combined with organizational efforts at socialization, help pave the way for new employee adjustment and outcomes such as job satisfaction, commitment, retention, and job performance (Bauer & Erdogan, 2011).

Organizational efforts at socialization are shown to be most helpful to newcomer adjustment when they include realistic job previews, formal orientation programs, and mentors (Bauer and Erdogan, 2011). In addition, research shows that managers play a role in the newcomer’s socialization, particularly with job satisfaction and performance (Korte, Brunhaver, & Sheppard, 2015), learning the organization’s social norms and role behaviors (Jokisaari, 2013), reducing feelings of isolation, and connecting newcomers to important resources and individuals (Black and Leyson, 2002).

Onboarding Team Members

Newcomers’ socialization occurs at several different levels within the organization, including at the team level or work group. Research illuminates the important role that existing team members play in the socialization process, and therefore, the onboarding process for newcomers (Chen, 2005; Smith et al., 2012; Lu and Tjosvold, 2013; Rink et al., 2013; Rink and Kane, 2014).

Lu and Tjosvold’s (2013) research on goal interdependence within teams shows that managers help newcomers become socialized by acting as a role model and providing positive social support. At the same time, the manager strengthens the team by creating opportunities for achieving cooperative goals, shared aspirations, and common tasks. In a similar vein, managers can prepare the existing team members for the newcomer’s arrival and ask them to ...” consider newcomer knowledge, and ultimately give up time-tested practices to adopt the unique newcomer knowledge” (Rink and Kane, 2014, p. 216). In fact, when team members validate a newcomer’s behaviors, and promote fairness within the team, it can result in the newcomer’s satisfaction at both the team and organization levels (Smith et al., 2012).

Managers should empower newcomers with challenging work by involving them in key team decisions (Chen, 2005), setting challenging team goals (Chen, 2005), and utilizing an egalitarian communication and decision-making climate, and reflective practices among team members (Rink et al., 2013).

Methodology

This exploratory case study presents an in-depth investigation of an onboarding event involving two academic librarians: a Generation X librarian (Margie, the supervisor and Instruction Coordinator) and a Generation Y librarian (Rebeca, the Instructional Design Librarian). The authors used a multi-modal approach to the case study, employing observations and a review of institutional documents and personal notes. The chapter takes the form of narrative description and interpretation accompanied by a review of the relevant literature in library and information science, psychology, business, and general onboarding websites.

Institutional Review Board Statement

The authors did not seek IRB approval as the study involved their personal onboarding experiences. No other human subjects were studied.

Discussion

Margie was excited about welcoming Rebeca into the library and into the Instruction Team. However, she would be unavailable during the first few weeks and wished to provide as much support as possible virtually. Taking this campus onboarding guidance into consideration, Margie created a list of items she would have covered with Rebeca (Appendix A), had she been available, and shared it with Rebeca via email:

- Links to library organizational chart, staff directory, and library liaisons
- Instruction Team mission, goals, meeting minutes, annual reports, current and past projects, assessment reports, and network drives
- Instruction Program mission and learning outcomes
- Library Instruction Google Site
- Website for library's how-to videos
- Description of the Library's shared first-year instruction and location of teaching materials
- High-priority instructional design projects

In Margie's absence, Rebeca attended the ONE Boise State orientation the morning of her first day and then the Associate Dean and Shelly, a long-time member of the Instruction Team, welcomed her to the library. Shelly was instrumental in Rebeca's first weeks as she performed the role of a "sponsor" (Stibitz, 2015, para. 4) and helped her get access to special drives, provided account information for various programs used in the library and helped locate any files necessary to complete high-priority projects.

Rebeca also attended the two-day New Faculty Orientation delivered by the Center for Teaching and Learning (CTL), which acquainted her with additional university policies, opportunities and resources for faculty, and allowed her to network with new and experienced faculty from all over the university. As a part of the New Faculty Orientation, the CTL provided a voluntary mentoring experience, which Rebeca took advantage of and was partnered with a tenured faculty from the Linguistics Department.

Upon Margie's return to work, she and Rebeca got to know each other better, including Rebeca's insights into her Generation Y mindset. They discussed some of what Margie had included in her team onboarding document, and outlined their working relationship. They also completed onboarding activities recommended by human resource services and the provost's office. Human Resource Service's checklist includes tasks to do before the new employee arrives and during their first week of work, such as adding the employee to directories, communicating expectations and responsibilities, and familiarizing them with co-worker's job functions. Interestingly, the checklist states that prior to the new employee's arrival, the department should select a buddy or mentor for the first few weeks and outline areas to cover. There is no incentive to follow up on this, however, despite research that says a mentor is integral to the onboarding and organizational socialization processes (Benjes-Small and Miller, 2017; Korte and Lin, 2013; Lee, Oh, & Burnett, 2016; Nigah, Davis, & Hurrell, 2017; Ostroff and Kozlowski, 1993; Oud, 2008; Simmons-Welburn & Welburn, 2003).

The Office of the Provost's guide is more specific in regard to onboarding new faculty members, and was created with feedback from second-year faculty (Boise State University, 2015). The document points out that while faculty are appreciative of university-wide programs and services, "they especially love it when their own departments make a sincere effort to communicate a warm welcome and to demonstrate their support for a successful start" (Boise State University, 2015, p. 1). The guide lists three key ideas for every department to consider: 1) personal connections matter, 2) get everyone involved, 3) timing is everything, plus more specific ideas such as:

- Welcome activities, some that include families as well as colleagues.
- Provide training on policies, processes, and technologies right away.
- Make as many personal introductions as possible.
- Introduce new faculty to campus resources for guidance in teaching, research, and service activities.
- Go over the department, college, and university policies and procedures related to workload, tenure and promotion, and annual performance evaluation.

Margie created a team-building activity to help the existing Instruction Team members and Rebeca get to know each other better, and learn about the team's work, based on an activity from organization development firm 3COze (Appendix B). The activity prompted each team member to complete sentence stems such as "The unique value we're focused on adding is..." and "My strengths and the things I'm good at..." (Davey, 2013). It turned out to be one of the most enlightening onboarding activities because all team members learned more about each other. Margie, especially, learned more about the existing team members' perceptions of the team's overall mission and their strengths, as well as learning more about Rebeca.

Later, during the fall semester, Margie organized a happy hour for Rebeca to get to know the other librarians socially. Also, during the fall semester, Rebeca talked about her current instructional design projects at a unit meeting, which helped achieve the goal of helping librarians understand her role at the library, and how they can collaborate on instruction.

Boise State's general and new faculty orientations clearly emulate many of the best practices described in the literature; however, both of those experiences occurred within the first 30 days and no further contact was initiated by either program. This seems contrary to what the literature describes as year-long processes (Lawson, 2017). While there are specific programs one can opt into, such as a tenure focused support curriculum, provided by the Center for Teaching and Learning, and the first-year mentor program, both are voluntary and not well advertised beyond some pre-start date emails from human resources or handouts given during an orientation. And although the university human resource department did work to send preliminary emails before the start date, a recommendation Gelinas and Brennan (2017) reiterate, they failed to ensure that the recipient had received communication that their email was activated which is where preliminary resources had been sent. It also appears that Human Resources was not active in helping specific departments define onboarding processes beyond providing the general checklist, leaving departments to define their own programs.

Work/Life Balance

Margie and Rebeca met one-on-one when Margie returned to work after a leave, to discuss their styles and expectations that they both might have for each other. This allowed Rebeca to define slightly different hours from many other staff allowing her to reduce traffic conflicts to and from work. Shelly worked hard in Margie's preliminary absence to help Rebeca connect to the community outside of work and get to know Boise better by adding her to a compiled website of suggested things to do in the area.

Regular Feedback

Organizational socialization researchers recommend establishing a way for the supervisor to support the new employee, in terms of connecting them to resources (Black & Leysen, 2002) as well as learning social norms and role behaviors (Jokisaari, 2013). Margie established weekly check-in meetings early on to address these issues and provide a continued connection. Margie helped troubleshoot questions such as tenure requirements, managing personalities outside of the team, and various liaison-related responsibilities.

Meaningfulness

Margie did some preliminary work to find projects for Rebeca to work on with other librarians, which was helpful as it provided immediate opportunities for Rebeca to use her skills, a practice recommended by Keisling and Laning (2016) for successful onboarding. In addition, Margie set aside time during a unit instruction meeting for Rebeca to discuss her role and possible ways to help others with instructional design. It has helped that the library has had instructional designers integrated into the unit in the past, making the concept of instructional design more or less familiar.

On Demand Learning

As in many higher education institutions, there is quite a lot of institutional knowledge that makes finding information as a new employee difficult. Albertsons Library utilizes both Google Apps and network drives to store information, however, there is not always a clear organizational structure to the information. During the first few weeks, Rebeca spent a large amount of time familiarizing herself with the information listed in Margie's onboarding document. However, as the weeks progressed she found that she did not remember exactly what she had read or where to find the information when others referred to it. Fortunately, Shelly was able to refer Rebeca to the information when she could not find it herself and has continued to connect her to information as need for it arises. While the information is all electronic, the system's ability to provide on-demand support is low and the ability of the new employee to be independent is impeded due to needing to constantly ask a person for help locating information.

Social

Because she had had great success with mentors in the past, Rebeca welcomed participation in a voluntary faculty mentorship opportunity when she received an email about it from the New Faculty Orientation organizers during her first week. This proactive behavior by a newcomer (Bauer and Erdogan, 2011; Chao, 2012) has allowed her to connect with additional faculty in other departments on campus and discuss tenure related things such as research questions. In addition, Margie organized a cocktail hour for Rebeca during her first 3 months, providing opportunities to connect with library faculty in other units. The area of social engagement remains a somewhat weak point in the library in general and Rebeca has considered asking a more senior librarian to provide some mentoring, especially when she may not feel comfortable asking Margie in her supervisor capacity. Also, unlike Rebeca's experience in previous institutions, there is no organized cohort of newer librarians to help create social bonds and comradery. Most of the other librarians at Boise State are at a 2+ year mark, however, so a general pre-tenure group could potentially be formed.

Valued/Respected

The team activity Margie used helped Rebeca feel as though she was a valued team member while also giving her clear insight into other team members' working styles and behaviors as well as providing them with insight into Rebeca's work style and behaviors. Margie provided ample opportunities for Rebeca to review and offer gentle criticism on team policies, procedures and previous projects. The team also transferred all of their instructional design projects to Rebeca, an example of adopting the newcomer's knowledge (Rink and Kane, 2014). A few months after Rebeca joined Albertsons Library, the Instruction Team began reimagining the first-year information literacy program by going through the instructional design process. After completing the needs assessment and gathering input from everyone involved, the team and the instruction librarians decided to create online modules and digital badges (micro-credentials) for first-year and second-year information literacy instruction. These opportunities reflect researchers' conclusions about integrating a new team member into an existing team, specifically: involving the newcomer in key team decisions (Chen, 2005), and establishing goal interdependence (Lub and Tjosvold, 2013).

Transparency

Margie was upfront with Rebeca about the fact that onboarding was a new process for her, which allowed them to learn and grow together during this process. Margie also provided Rebeca with a lot of the strategic planning and legacy documentation from previous projects that showed how practices in place today came about. Margie and Rebeca believe that being open with each other is critical for newcomers, because it encourages them to ask questions and learn about their new organization.

Belonging

As stated in the literature review, decades of organizational socialization research has uncovered the fact that whether a new employee feels like they fit into a new organization determines whether they plan to stay in their new position. All of the onboarding activities described in this chapter helped Rebeca become an “organizational insider” (Bauer and Erdogan, 2011). Both the university’s efforts (university, library, team, and supervisor efforts) and Rebeca’s proactive behaviors contributed to her organizational socialization and onboarding experience, a prime example of Reichers’ interactionist perspective (1987).

Conclusion

Libraries will hire more and more Gen Y librarians in the coming years, making it imperative for libraries to closely examine those practices which increase retention of new talent. Based on their personal onboarding experiences and what they have learned about best practices in holistic onboarding of a Gen Y team member, Margie and Rebeca are making a few recommendations for the Albertsons Library (or any academic library). These include a formal, required, year-long onboarding process that include various socialization opportunities, mentoring, and making information accessible at the point of need rather than relying on an early deluge of information.

Offering a variety of socialization opportunities is important for success in general but is particularly important to Gen Y employees who value these opportunities. Mentoring, in particular, is a critical component of socialization as it gives the newcomer a resource for learning about organizational culture. In addition, it has proven successful in reducing turnover. Creating on demand, easy to access information via a thoughtful website, content management system or even a mobile app will allow new librarians to refer to necessary information at the point of need.

Margie and Rebeca are excited to engage other librarians and staff in discussion about what has been learned and to find out exactly what they think will be most helpful in the onboarding process. Input from colleagues will help determine what a mentoring program should look like, and what types of social activities to offer newcomers. In addition, specific onboarding topics can range widely from diversity to the scholarly communication process, and therefore, in the spirit of transparency, should be decided in a collaborative fashion.

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Appendix A



Dear Rebeca,

Welcome! We are glad you have joined Albertsons Library. I have gathered some information that will help you become more familiar with instruction at Albertsons Library. In addition, I have included a list of priority projects.

About the Library and Instruction Program

[Albertsons Library Organizational Chart](#)
[Library Liaisons](#)
[Instruction Team Goals 2016](#)
[Instruction Team Meeting Minutes](#)
[Library Instruction Google Site](#) (internal)
[Library How-to Videos](#)
[Albertsons Library Assessment](#)

Instruction Program Mission

To actively empower individuals in becoming lifelong learners through critical engagement with information.

Instruction Team Mission

Albertsons Library's Instruction Team is responsible for the development, implementation, and assessment of information literacy learning for Boise State University students.

Priority Projects

- Conduct needs assessment for first-year instruction.
- Familiarize all librarians and staff with your role.
- Instructional design for BUSCOM 201. Meet with business library liaisons.
- Create a programmatic model for instructional design, development, and improvement.

Looking forward to seeing you in August!

Sincerely,
Margie

1910 University Drive Boise, Idaho 83725-1430
Phone (208) 426-1234 library.boisestate.edu

This letter is an electronic communication from Boise State University

Appendix B

The Facts:

The mandate of our team from the organization is...

The unique value we're focused on adding is...

Our goals and initiatives for this year are...

The Norms:

The three things our team values most are...

The one no-no you should know is...

The hardest thing for people to figure out about the team is...

The Characters:

My strengths and the things I'm good at...

My foibles, character flaws, and blind spots are...

Three guidelines for getting the best out of me are...