

# "ONBOARDING IN THE HUMANITARIAN SECTOR USING DIGITAL PLATFORMS: THE IFRC GLOBAL ONBOARDING PORTAL CASE STUDY"

*Research Paper*

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## **“Abstract”**

*The humanitarian sector faces unique challenges, including the need for rapid mobilisation, cultural diversity and limited resources. Digital transformation, particularly in onboarding processes, offers strategic solutions by streamlining operations, improving efficiency, communication, collaboration and staff engagement, while ensuring alignment with the organisation's mission. This article explores the role of digital platforms, specifically the International Federation of Red Cross and Red Crescent Societies (IFRC) Global Onboarding Portal, in standardising onboarding processes across global teams. In addition, the research highlights the importance of agile project management strategies and human-centred design in the development of the onboarding programme. Future research is recommended to assess the long-term impact of the onboarding programme through longitudinal studies and to explore the potential of artificial intelligence to optimise onboarding processes.*

*Keywords: Humanitarian Sector, Onboarding Solutions, Digital Transformation, Agile Project Management, Human-Centred Design.*

## **1 Introduction**

In the fast-paced humanitarian sector, organisations must operate efficiently and adapt quickly to meet the needs of a diverse, geographically dispersed workforce. Effective onboarding is especially critical in high-stakes environments characterised by rapid mobilisation, emergencies and crisis management. For large international organisations such as the International Federation of Red Cross and Red Crescent Societies (IFRC), onboarding processes have historically been fragmented and inconsistent across regions.

To address these challenges, the IFRC designed and implemented the Global Onboarding Programme, hosted on a digital platform, to standardise procedures and improve staff integration globally. This article examines the programme as a case study in digital transformation, focusing on the use of digital platforms, agile project management techniques and human-centred design to streamline and improve onboarding in a complex humanitarian context. It discusses how these approaches address key organisational challenges such as process standardisation, social inclusion and alignment with the IFRC's strategic objectives, including Strategy 2030 and the IFRC's Fundamental Principles.

### **1.1 Onboarding in the Humanitarian field**

Onboarding is essential for integrating new staff into any organization, and in humanitarian settings, the stakes are higher due to the demands of crisis management. Effective onboarding impacts job

satisfaction, productivity, and retention (Bauer and Erdogan, 2011), ensuring that staff quickly align with the mission, values, and specific challenges of humanitarian work. It extends beyond traditional onboarding by preparing staff for high-stakes, rapidly changing environments.

For example, the IFRC faces challenges with resource mobilization and crisis adaptation, complicating the onboarding process (Alibalaev, 2024). Research has identified barriers such as trust deficits and inadequate capacity-building programs, which can hinder essential information sharing (Saa'da and Suifan, 2020). Programs should provide comprehensive training on crisis response, organizational policies, and inter-organizational coordination (Lu et al., 2013), while integrating principles of neutrality, impartiality, and independence to promote coherence (Horst et al., 2016).

The IFRC's onboarding aligns with strategic goals like Strategy 2030 and the Global Plan 2024, which emphasize developing a workforce that upholds Fundamental Principles: humanity, impartiality, neutrality, independence, voluntary service, unity, and universality. These programs prepare staff to tackle global challenges such as climate change, health crises, and migration (Gallardo et al., 2015).

Onboarding should go beyond administrative formalities, focusing on creating a positive employee experience that fosters engagement and retention (Plaskoff, 2017). This holistic approach supports IFRC's broader goals of agility, inclusion, and staff well-being. Sustainable onboarding practices influence innovation and long-term performance (Srisathan et al., 2020), while misalignment with corporate social responsibility can undermine outcomes (Lee and Kim, 2017).

Research shows that structured onboarding improves job satisfaction and reduces turnover (Lin and Huang, 2020). The integration of technology plays a significant role in this process, particularly with remote working trends. E-learning modules, virtual training, and digital platforms offer consistent training delivery, knowledge retention, and access to resources for globally dispersed staff. Online onboarding aligns with IFRC's digital transformation goals in Strategy 2030, enhancing efficiency, adaptability, and engagement (Sinclair et al., 2015).

## **1.2 Digital Platforms in onboarding**

The use of digital platforms for onboarding processes has changed significantly in recent years, particularly in response to the growing demand for remote solutions during global events such as the COVID-19 pandemic.

Digital transformation has redefined traditional onboarding methods by centralising resources and streamlining communication, as noted by Krasman (2015). This shift is particularly beneficial for global organisations, with the IFRC serving as a prime example. The IFRC's Global Onboarding Portal consolidates all onboarding materials - such as policies, manuals, checklists, e-guides, internal and external links, training modules and resources - into a single, accessible digital hub. This approach ensures that staff have equal access to essential tools, regardless of location.

A key feature of the portal is its customisable learning pathways, which provide role-specific training and content tailored to regional needs. This personalisation reduces information overload and provides employees with relevant information tailored to their position. Digital platforms also allow for real-time updates, ensuring that onboarding content remains current and responsive to global crises or organisational changes - an essential factor in high-pressure environments such as humanitarian organisations.

Digital onboarding typically involves guiding new users or employees through initial interactions to promote engagement and retention. Research suggests that effective onboarding strategies often incorporate personalisation and user-centred design (Duran et al., 2023). However, implementing digital onboarding can be challenging, particularly for users with limited digital literacy. Hernandez-Ramos et al. (2021) found that providing additional human support during onboarding significantly reduces digital literacy barriers, although it may not eliminate them altogether.

Studies also suggest that onboarding on multifaceted platforms is complicated by the need to serve different user groups simultaneously, requiring significant customisation and ongoing monitoring (Reuver et al., 2018). Furthermore, for platforms supporting older users, digital maturity and trust are critical factors influencing the onboarding experience, requiring age-appropriate design considerations (Frishammar et al., 2023).

Technological innovations play a key role in improving onboarding processes on digital platforms. The use of frameworks to provide visually appealing walkthroughs can improve the user experience and increase engagement (Hidayat and Sungkwo, 2020). In addition, smartphone access to onboarding materials facilitates engagement - especially in sectors such as humanitarian work and disaster management, where remote guidance and quick access to educational content are essential.

While digital platforms offer significant opportunities for onboarding, they also present unique challenges. A successful digital onboarding strategy requires a blend of human-centred design, technological innovation, and adaptable approaches to meet diverse user needs. Integrating supportive practices - such as remote access, easy access to contacts and resources, and personalised content - can help overcome digital barriers and improve the user experience across industries.

### **1.3 Human-Centred Design**

Human-Centered Design (HCD) emphasizes understanding users' needs, preferences, and experiences to create intuitive and effective solutions. When applied to onboarding programs, HCD increases employee engagement, supports adaptation, and enhances the overall experience by tailoring the process to the unique requirements of newcomers, onboarding teams, and the organization's mission (Eardley et al., 2022).

Research shows that involving end-users in the design process helps identify potential challenges early, resulting in higher satisfaction and usability (Eardley et al., 2022). The HCD approach is particularly effective in addressing onboarding challenges such as adapting to organizational culture, learning complex processes, and navigating digital platforms. Studies like Cheng (2017) emphasize the importance of simplifying tasks and providing contextual support to ease transitions. Similarly, Stevenson and Oscarsson (2021) showed how iterative design ensured a maternity care app met users' unique needs - an approach that could be applied to onboarding to create more personalized learning experiences.

In building the IFRC Global Onboarding Portal, focus groups were used as an HCD strategy to involve participants in shaping the solution based on their experiences and needs. This participatory approach ensured the final design addressed real user challenges and remained adaptable to different contexts, emphasizing empathy and continuous improvement. By actively engaging users in the design

process, the onboarding solution was able to reflect diverse perspectives and meet the varied needs of IFRC staff across regions.

In addition to leveraging technology, human interaction is essential in onboarding, with the Buddy System serving as a key strategy. Pairing newcomers with a dedicated "buddy", an experienced colleague, facilitates integration, boosts engagement, and enhances overall satisfaction. The personalized support provided by buddies helps new employees navigate their roles and organizational culture more effectively, fostering a sense of connection and community. This approach is particularly valuable for social inclusion, as it positively impacts mental health during the transition period. For example, Burkhart (2013) found that buddy systems can enhance self-regulation and emotional support in behavioral change interventions, highlighting the social component's influence on successful outcomes. Similarly, a study by Viviani and Murphy (2019) found that buddy systems accelerate integration, improve productivity, and help newcomers quickly adapt to company culture through regular, supportive interactions.

Overall, HCD provides a robust framework for creating onboarding programs that are user-friendly, engaging, and adaptable, leading to improved experiences, stronger social connections, and higher retention rates. By combining technology with strategies like focus groups and the Buddy System, onboarding solutions can effectively address diverse user needs and support continuous improvement.

## **2 Methodology**

This research adopted a mixed methods approach, combining both qualitative and quantitative methods to provide a comprehensive examination of onboarding practices within the IFRC. By integrating these methods, the study aimed to capture both the detailed individual experiences of stakeholders and broader trends across the organisation, as recommended by Glesne (2011), to ensure a thorough exploration of the research topics from multiple perspectives.

The qualitative aspect of the research focused on capturing in-depth insights through semi-structured interviews and focus groups. Semi-structured interviews were conducted with various stakeholders, including HR managers, global leadership and other organisations, allowing participants to express their experiences and perceptions in their own words. This method helped to uncover the nuances of onboarding practices and identify areas for improvement. In addition, the focus groups provided an opportunity for collective discussion with HR stakeholders, providing insights into group dynamics and the overall culture of onboarding within the IFRC. This approach is consistent with Glesne's (2011) emphasis on participant-centred inquiry, allowing for a rich understanding of organisational culture and individual experiences, and a human-centred design approach to building the programme together based on their needs.

Thematic and content analysis was used to process the qualitative data, drawing on the frameworks of Erickson (1985) and Banister et al. (2011). This method, rooted in qualitative research traditions, allowed for the extraction of recurring themes and patterns. Following the suggestions of Glesne (2011), the researcher adopted a reflexive stance throughout the process, ensuring that the interpretation of the data remained sensitive to the cultural and contextual dynamics of the participants.

The quantitative component of the study was based on surveys distributed to newcomers who joined the IFRC between 2020 and 2022. These surveys included both closed and open-ended questions,

allowing for the collection of both numerical data and personal insights. This method is consistent with the approach advocated by Creswell (2014), who suggests that quantitative surveys can effectively complement qualitative methods by providing broader generalisations. The data was processed using statistical tools, with a focus on identifying key trends in onboarding satisfaction, challenges and areas in need of standardisation. By analysing the quantitative data, the study provided measurable insights into the overall effectiveness of the onboarding programme, in line with the purpose of quantitative methods (Creswell, 2014).

The integration of both qualitative and quantitative methods allowed for a deeper understanding of the research problem. The qualitative findings provided context and depth to the statistical data, while the quantitative findings helped to generalise the experiences to a wider population. This methodological triangulation, supported by the work of Creswell (2014) and Teddlie and Tashakkori (2009), strengthened the validity and reliability of the findings and provided a well-rounded perspective on onboarding practices within a global, diverse humanitarian organisation. The mixed methods approach enabled the study to address the complex, multifaceted nature of onboarding at the IFRC, ensuring that both individual experiences and organisational trends were thoroughly explored. Table 1 illustrates the intricate relationship between the research design and the research questions:

<b>Research Question</b>	<b>What was the experience of newcomers during the period between 2020 and 2022?</b>	<b>What are the existing onboarding practices within the IFRC?</b>	<b>What is the vision of the global leadership about a global onboarding for IFRC?</b>	<b>What are the HR stakeholders' requirements in a global onboarding?</b>	<b>What are the benchmarks for onboarding outside the IFRC?</b>
Instruments	Survey multiple-choice and open question.	Semi-Structured Interview	Semi-Structured Interview	Focus Group Interview	Semi-Structured Interview
Analysis	Quantitative and Qualitative	Content and thematic analysis	Content and thematic analysis	Content and thematic analysis	Content and thematic analysis
Research Type	Evaluation Research	Descriptive Research	Descriptive Research	Exploratory Research	Descriptive Research
Participants	Newcomers hired between 2020-2022	Managers	Global Leadership Team	HR stakeholders	Other organizations and sectors.
Sample	242	24	8	32	7
Total	313				

Table 1 – Research Questions and Methodologies

### 3 Results

The analysis of the onboarding process at the IFRC revealed key insights, particularly in the areas of social inclusion, learning and development, and the structuring of onboarding practices. These findings were derived from in-depth thematic and content analysis of interviews with key stakeholders, including managers, HR representatives, and global leadership, other organisations as well as surveys conducted among newcomers.

The most frequently mentioned topics were social inclusion and learning and development, with significant input from both global leadership and managers. These two themes highlight the importance of creating an inclusive environment where new recruits can seamlessly integrate into the organizational culture and receive ongoing professional development through structured e-learning modules and training. The emphasis on social inclusion reflects the IFRC’s commitment to fostering a sense of belonging among newcomers, which is vital for ensuring their long-term engagement and productivity.

The topics of IFRC culture and onboarding monitoring also featured prominently. These discussions emphasized the necessity of aligning newcomers with the organization’s values, as well as the need for consistent progress tracking to ensure the onboarding process is smooth and effective. HR Stakeholders emphasized the importance of monitoring tools and regular feedback loops to assess the onboarding experience in real-time.

Further analysis of onboarding practices and steps pointed to the need for clear structuring and practical implementation. Managers, in particular, highlighted the importance of providing newcomers with a well-defined framework for understanding their roles and responsibilities. This clarity was seen as a crucial factor in reducing confusion and helping new staff become productive more quickly.

While administrative and technical issues were mentioned less frequently, they were still acknowledged as important elements that need to be addressed to ensure operational efficiency. As shown in the Figure 1, the topics reflect the organization's focus on integrating newcomers into its culture and ensuring they have access to continuous learning opportunities. Other notable topics, such as onboarding monitoring and onboarding practices, indicate a strong organizational focus on structure and accountability. This distribution of topics underscores the balanced approach the IFRC takes towards both cultural integration and the practicalities of onboarding.

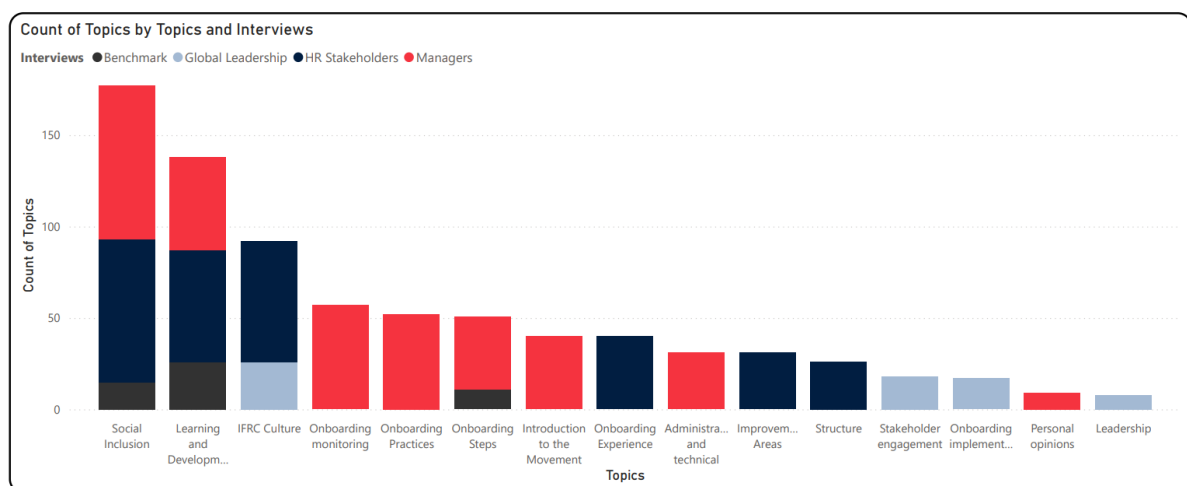


Figure 1. Topics by Stakeholders

A critical tool in this onboarding process was the IFRC Global Onboarding Portal, a SharePoint site build dedicated to present the programme, which played a key role in ensuring a centralized and consistent experience across all departments. Through this platform all onboarding resources were made easily accessible to everyone with ifrc.org email, allowing for the standardization of the onboarding process across a distributed and global workforce. The portal helps modernize operations and make the onboarding process scalable and adaptable to the organization's global reach.

The use of agile project management techniques was also a fundamental aspect of the onboarding program's design. The agile approach emphasized collaboration, flexibility, and continuous improvement, enabling the onboarding program to be adaptable to the rapidly changing needs of the humanitarian sector. By incorporating iterative development cycles, the program could continuously refine its processes based on real-time feedback from both newcomers and stakeholders, ensuring that it remained relevant, efficient, and adaptable.

The findings from the thematic analysis were applied to refine various aspects of the onboarding program:

- Social integration tactics were enhanced by introducing a buddy system and incorporating team-building activities, briefing with other departments, teams group for newcomers, which improved the sense of belonging for newcomers.
- The use of agile techniques allowed the program to remain flexible and responsive to feedback. This made the onboarding process more dynamic and personalized to meet the needs of users of onboarding.
- Digital tools such as Microsoft Forms and PowerBI dashboards were employed to collect, analyze, and visualize data. These tools provided actionable insights that informed the continuous improvement of the onboarding process.

The IFRC Global Onboarding framework, as depicted in the figure 2, integrates multiple projects and processes to ensure a comprehensive onboarding experience. Key projects include the IFRC Buddy, IFRC Newcomer, and IFRC Onboarding Team, each providing manuals, e-guides, links, and meetings for support. The intranet site serves as a centralized digital platform, offering five main pages and two resource libraries. Supporting processes include a Quality Framework, incorporating surveys, focus groups, and meetings for continuous improvement. Onboarding Solutions with visual identity tools, and a Communication Strategy utilizing articles, emails, meetings, and posters to engage and inform newcomers effectively, while supporting the buddies and the onboarding team. The programme structure ensures a consistent and effective global onboarding implementation, aligned with the organization's strategic objectives.

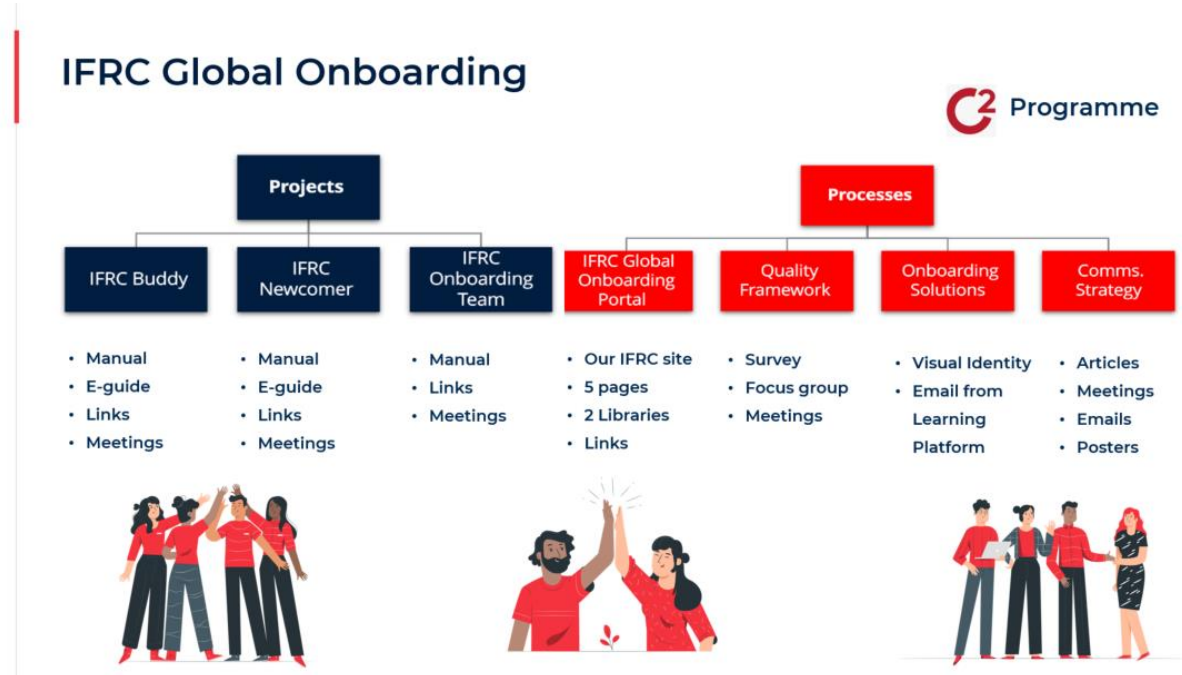


Figure 2. IFRC Global Onboarding Programme Framework

## 4 Discussion

The development and implementation of the IFRC's global onboarding programme provides valuable insights into the use of digital platforms to standardise processes across a diverse, global organisation. When compared to existing literature, the IFRC's approach aligns with key themes such as the importance of centralization and accessibility in onboarding (Bauer and Erdogan, 2011), while also reflecting the organization's unique challenges of operating in a humanitarian context. Similar studies highlight the need for standardisation to improve the consistency of the new employee experience, and the IFRC's onboarding portal addresses these needs by creating a centralised repository of onboarding materials. However, the IFRC's specific focus on fostering a sense of community and aligning the onboarding process with organisational values goes beyond the standard onboarding literature and highlights the critical role of onboarding in promoting cultural integration and mission alignment.

The practical implications of the onboarding programme are significant. By providing newcomers with easy access to learning materials and a clear introduction to the IFRC's mission, the programme accelerates the integration of newcomers, reducing the time it takes for employees to become productive members of the organisation. The programme also improves talent retention by creating a supportive environment where new employees feel valued and connected to their teams. The introduction of digital tools are critical to maintaining the relevance and effectiveness of the onboarding process. Overall, the platform not only ensures operational efficiency, but also strengthens the IFRC's capacity to respond to humanitarian needs by preparing staff quickly and effectively.

However, a number of challenges and limitations need to be addressed. User adoption can be a challenge, especially among employees with limited digital literacy or resistance to new technologies. While the platform provides a standardised process, the lack of customisation for regional or departmental differences can lead to disengagement or ineffective onboarding in certain contexts. In



addition, content maintenance requires ownership and an ongoing effort to keep materials up to date, and data security must be rigorously enforced to protect sensitive employee information.

Programme success metrics are primarily measured through user engagement statistics, such as frequency of portal visits and completion rates of e-learning modules. However, collecting qualitative and quantitative data from newcomers and managers is important to assess the true effectiveness of the onboarding programme and identify broader trends. This data-driven approach, combined with agile methodologies, enables the organisation to make continuous improvements based on real-time insights, ensuring that the onboarding programme remains adaptable and relevant to the evolving needs of the organisation.

Looking ahead, the IFRC could explore several avenues for future research and improvement. One possibility is to integrate artificial intelligence (AI) into the platform, allowing for a more personalised onboarding experience that addresses the specific needs of different regions and departments. Another potential area for future study is to conduct longitudinal research to assess the long-term impact of the onboarding programme on employee engagement, retention, job satisfaction and performance. This would provide more comprehensive data on the effectiveness of the onboarding programme beyond the initial onboarding period.

Throughout the design and implementation of the Global Onboarding Programme, several lessons have been learned. The use of agile project management techniques allowed for flexibility and adaptability, allowing the programme to evolve based on feedback from users and stakeholders. A key lesson is the importance of involving multiple stakeholders in a human centred design - including HR, global leadership, management and newcomers, besides other organisations - in the design process to ensure that the programme meets the needs of all stakeholders. It also highlighted the need for customisation, as different regions and departments require slightly different approaches to onboarding to meet their specific operational needs.

In conclusion, the IFRC's global onboarding programme is a key component of the organisation's digital transformation and strategic growth. The platform's centralisation of resources, alignment with the IFRC's strategic goals, and use of agile methodologies contribute to its overall success. However, ongoing evaluation, user feedback and continuous improvement are essential to ensure that the programme remains effective and relevant in the face of changing organisational needs. By embracing digital platforms and remaining adaptable, the IFRC can continue to improve its onboarding process, ultimately enhancing staff readiness and organisational effectiveness in humanitarian operations.

## **5 Conclusion**

The IFRC's Global Onboarding Programme demonstrates the transformative potential of digital platforms in standardising onboarding processes across a global organisation. By centralising resources and fostering a sense of community, the programme has effectively improved the integration of newcomers while aligning with the IFRC's strategic objectives. Agile project management techniques, combined with human centred design and continuous monitoring, have ensured that the onboarding process remains flexible and responsive to the evolving needs of the organisation.

Looking ahead, the integration of advanced technologies such as artificial intelligence and the exploration of long-term impacts through longitudinal studies will be critical to further refining the programme. By continuing to adapt and innovate, the IFRC can strengthen its onboarding process,

ultimately improving staff preparedness and strengthening its ability to respond efficiently and effectively to global humanitarian challenges.

A final disclaimer note: The views and opinions expressed in this article are solely those of the researcher and do not necessarily reflect the official position of the IFRC.

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