

OPERATIONAL EXCELLENCE

A Leadership Case Study

How People-First Leadership helped new employees feel more comfortable with the technology and the company

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MAKING TECHNOLOGY WORK FOR PEOPLE

The best onboarding isn't remembered for being impressive. It's remembered because nothing stood in the way of someone doing their job.

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Executive Summary

Every new employee begins a new position with excitement, anticipation, and a desire to succeed. During their first few days, they are introduced to new coworkers, organizational processes, and the technology they will depend on every day. While orientation provides an essential foundation, it also delivers an extraordinary amount of information in a very short period of time. No matter how well it is presented, employees inevitably leave with questions that arise only after they begin doing their work.

As those questions surfaced, employees often had to interrupt their work to seek assistance from IT. While helping users has always been an important part of my role, I recognized an opportunity to improve the experience. Rather than repeatedly answering the same questions, I wanted to equip new employees with the confidence to find answers independently while always knowing IT remained available to help when needed.

To bridge the gap between orientation and day-to-day work, I developed a comprehensive IT Welcome Guide that employees could keep at their desk or in their laptop case. This was not simply another document. It was intentionally designed around how people actually sought help—placing practical answers within reach at the moment they were needed rather than expecting employees to remember where to search for them.

This case study explores how listening to users, understanding their experiences, and designing with empathy can turn routine documentation into a tool for operational excellence. The result was more than a reference manual—it was an investment in employee confidence, productivity, and the belief that technology should help people succeed, never stand in their way.

Author's Note

Throughout my career, I have discovered that the best technology solutions rarely begin with technology. They begin with people. Before I think about software, documentation, or processes, I find myself asking different questions. How do people actually work? Where do they become frustrated? What makes them hesitate? What gives them confidence?

Those questions have shaped every project I have led. Whether implementing a new communication system, improving an onboarding experience, or creating documentation, my goal has never been to ask people to adapt to technology. Instead, I have tried to adapt technology to the people who depend on it every day.

This case study is one example of that philosophy in practice. What began as a simple welcome guide gradually became something much more—a way to reduce uncertainty, build confidence, and help new employees begin their work knowing that the answers they needed were never far away.

I have long believed that technology should work for people, not the other way around. This project reminded me that sometimes the most meaningful improvements are not the ones that introduce new technology, but the ones that make existing technology easier for people to understand, trust, and use.

Welcome Aboard

Starting a new job is exciting. It is also overwhelming.

During the first few days, a new employee encounters to new coworkers, new policies, unfamiliar technology, and the culture of an organization they are only beginning to understand. Names blur together. Acronyms appear before anyone explains them. Passwords, procedures, phone numbers, and software are presented one after another, each one important, each one competing for attention.

Everyone conducting orientation wants new employees to succeed. Human Resources explains benefits and policies. Managers introduce expectations. Coworkers offer encouragement. IT provides the technology that will allow them to do their work. Every part of the organization is trying to help.

The challenge is not the quality of the information. The challenge is the quantity. No matter how well orientation is delivered, people simply cannot absorb everything in a single day. The questions that matter most rarely arise during orientation itself. They appear later—when someone sits down at their desk, opens their laptop, and begins doing the job for the first time.

That is when confidence is tested.

I came to believe that a new employee should never feel:

- Lost
- Alone
- Afraid to ask questions
- Worried about fitting in
- Confused about how to accomplish their work

Instead, by the end of their first week, they should feel:

- Empowered
- Comfortable in their role
- Confident they know where to find answers
- Welcomed by both their department and the organization
- Ready to contribute

Those goals had very little to do with technology.

They had everything to do with people.

Stepping Into Conversation

The Welcome Guide was never intended to replace conversations with IT. It was intended to begin them. It bridged the gap between orientation and the moment someone found themselves alone at their desk with a question. The guide gave people the confidence to move forward while reminding them they were never expected to figure everything out by themselves. But it also let them know that IT cared enough about them as people to make sure they had the tools and support they needed to succeed.

Anyone can slap together a few pages of notes, hand it off and say, “Good Luck.” But I never thought that way. That is why the guide started with an introduction. Not the “How do you change your password”, but rather, “Hey, this is your IT team. We are here to help. You can contact us in one of several ways, feel free to use the one that best works for you.” Yes, I explained how to submit a ticket, but I never ignored someone if they didn’t do that first. Often, I would be on the phone solving their problem, then click the little help desk button and put in the quick description of the problem. I would then say, “There, we got that little thing out of the way.”

The Welcome Guide may have been the first conversation we had with you, but it shouldn't be the last. Technology works best when documentation and people work together. If the guide answers your question, wonderful. If it doesn't, that's why we're here. Every question you ask helps us improve the guide, improve the process, and improve the experience for the next new employee. That's how good onboarding keeps getting better.

Eliminating Barriers

As I watched new employees settle into their roles, I began noticing a pattern. The questions they asked were rarely complicated. Most weren't technical at all. They were the small moments that interrupted momentum—a forgotten website, an unfamiliar process, a phone number they couldn't remember, or simply not knowing where to begin. Individually they seemed insignificant. Together they became barriers that interrupted confidence, slowed learning, and kept people from focusing on the work they had been hired to do.

I kept track of the questions each new user asked because every repeated question revealed another barrier I hadn't removed yet. How do I set my password? What are the password requirements? How do I check my voicemail? So that is where this all started. A simple document that helped them get set up.

Then came the other questions. How do I print over here, I don't have that printer? I need to be able to have a conference call, how do I set that up? The questions kept coming. Each question meant time lost, and probably more important, confidence lost. So, sections got added. One by one, as people asked the same questions during their first weeks, new documentation found its way into the guide. It was never "completed." It was meant to be a living document, growing and evolving as the needs of employees and the organization changed.

And some of the questions it answered were the really simple ones. "What does this icon do?" So a page was devoted to the standard icons that came with all machines. Others were more complicated. "How do I use Teams to communicate with others?" A whole section was dedicated to how to utilize Teams.

The purpose was never to make people feel they couldn't do something. It was to give them the confidence to do it on their own. Every page, every addition, and every revision was another barrier removed between the employee and their ability to succeed.

A Living Guide

The day I printed the first copy of the Welcome Guide wasn't the day it was finished. It was the day its real work began. It was short, and it covered only a few basics. But the questions kept coming. And each question was a barrier to getting work done.

Some updates came because technology changed. Others came because people taught me something. A question I hadn't anticipated. A shortcut someone discovered. A better way to explain a process. Every conversation became an opportunity to improve the guide for the next person.

A living guide doesn't just grow. It also becomes simpler. As technology changed or processes became easier, outdated pages disappeared. Every page had to continue earning its place.

A living guide reflects a living organization. It demonstrates that improvement isn't something we schedule once a year; it's something we practice every day. By continuing to listen, observe, and refine, the guide became more than documentation. It became a record of everything we had learned about helping people succeed.

Confidence Through Understanding

The purpose of the Welcome Guide was never to provide answers people would memorize. It was to teach them how to find answers, understand the technology, and grow confident using it on their own.

Of course, there was always the person who would call about something in the guide. Rather than just saying that it was in the guide on page 10, I asked them pull out the guide, turn to page 10, and let's walk through it together. The goal wasn't to end the phone call. The goal was to make sure they wouldn't need to call for the same question again.

As people gained confidence, I started noticing something interesting. After they started to understand what the technology could do, they started to figure out new ways to make it work for them.

The Teams portion went over all the features of Teams. And it also left the user looking for ways to utilize this. Ways to expand and grow from it. Pretty soon users were creating groups of people to share their ideas with. The guide went over groups, yet each group that was created was different. Each group served a different purpose. It didn't tell anyone how to utilize their group. It didn't tell anyone what had to be a part of a group. It showed them what a group could do and how it could be better utilized.

Soon, they learned that files in a group could not only be shared, but multiple people could be in it at the same time. They could be updating, reviewing, and revising all together. Engineers found this especially helpful with their spreadsheets monitoring different parts through plant.

The guide never told them that. They learned that from using the guide as that jumping off point.

Looking in the Mirror

As I look back on this, I feel that many lessons were learned. Some obvious. Some not so.

This really taught me how to listen. Going back to my Radio Shack days, I had to listen to my users. I had to determine what they really were after. What was the root of the questions they were asking. Did it really have to do with a password change, or was there something deeper?

Every addition to the guide represented a question someone had trusted me enough to ask. Every page I removed represented something that no longer needed to stand in their way. The guide wasn't becoming larger. It was becoming more useful. It wasn't about making a perfect guide. It was about continuously improving it, and the users confidence from day one. It was about making sure that they felt empowered and confident.

Looking back, I realize this project changed more than my documentation. It changed the way I approached every technology project that followed. Before thinking about systems or software, I found myself thinking about the people who would use them. If I could help them understand, confidence would follow. And when people become confident, technology stops being an obstacle and starts becoming an opportunity.

Moving Forward

Orientation ends on the first day. Confidence begins on the second.

The true measure of onboarding isn't whether someone remembers everything they were told. It's whether, when the first real question arises, they know where to turn, believe they can find the answer, and feel comfortable asking for help if they can't.

Documentation is often viewed as the final step in a project. I have come to believe it is the first act of teaching. And teaching is one of the most meaningful ways technology can remove friction and help people succeed.

Tell Me and I Forget

Teaching is more than standing in the front of a room spouting off knowledge. A while back my brother, a teacher, told me “Tell me and I forget. Teach me and I remember. Involve me and I learn.” It is actually a quote from Benjamin Franklin. And that is how I teach. I will start with a quick tell and then a quick show. But I will always end with an involving the user.

This is done in many ways. That initial phone call or stop by is where we talk. I get to the root of their questions, and I discuss what needs to be done. Then I will do a quick showing of them, ending with them doing it themselves. Sometimes this comes in the form of a new or existing guide that I give them. Sometimes we have worked out the guide together.

I had a user who constantly forgot how to save her spreadsheets with a password. I showed her. Sure enough, she forgot how. The next time, we sat down, I opened up Word, and as I worked through the issue with her, I took screenshots and notes, took it all the way to the final step. I saved this document to her desktop and printed it. Then I went back and removed the password from her document. She looked at me with the “What did you just do to me?” look. I smiled, moved aside and said, “Your turn. While I am still here. Just to be sure I got all the steps.” She followed the steps and was able to save the document with the password. She never had to ask me again.

Some time later she thanked me for being so patient with a 'boomer who was technology slow.' I smiled because I had never thought of it that way. I wasn't being patient because of her age. I was being patient because everyone deserves to learn without feeling embarrassed. Technology changes quickly. None of us starts out knowing it all. My job has never been to show people what they don't know. My job is to help them discover what they can do.

Of course, I also sent myself a copy of that document, prettied it up, and saved it. Next person who had the question, I sent it out, called them, and said, “Let’s walk through this together.” Solving the problem for one person is important, but when you can use it to solve it for another, even better.

It is never about the guide, it is never about not wanting to be asked again, it is simply the way to give the user the confidence to do their job.