How Should I Plan To Bring New People Up To Speed During My Projects?

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**Abstract.** The original paper addresses the challenges of managing team dynamics and personnel changes in projects, recognizing the inevitability of such changes due to turnover, project modifications, and other factors. Emphasizing the importance of anticipation, project managers are advised to assess the potential impact of losing team members, particularly those with specialized skills, and develop contingency plans. The integration of plans for team changes into project schedules, including cost estimates, is essential. Flexibility in scheduling is highlighted to accommodate unexpected turnovers, and minimizing turnover is underscored as vital for successful project management. In the event of staff changes, guidance on swiftly integrating new team members by fostering relationships, trust, and connections with existing team members holds significance. Strategies for redistributing responsibilities and optimizing available talent when a key contributor is lost are also necessary. The ideal scenario consists of adding team members at the project's start, although this may not always be feasible. When new individuals join the team, the prompt rebuilding of cohesive teamwork and adjustment of task assignments to prevent project difficulties or failure are emphasized. In conclusion, some important notes include stressing the significance of retaining team members and advising project managers to incorporate budget reserves for addressing the costs of staff turnover in project risk provisions. Overall, this topic provides practical insights and strategies for project managers to navigate personnel changes and maintain project success.

**Keywords:** New Employees, Onboarding, Challenges

1. Introduction

### We’re going to delve into the challenges and nuances of onboarding individuals into project teams. The problem consists of integrating new employees into projects. The focus is on the onboarding experiences of practitioners joining project teams, which is crucial for newcomers to integrate into the organization effectively. Having new people join the project team later along the way causes some challenges that we need to prepare for.

### Two research questions guide this report: How do newcomers integrate into an ongoing project team? and how to facilitate the process of onboarding?

In this report, we will go into what are the challenges of adding new people to projects. We introduce these challenges with a short explanation of how we can face them. Later, we presented three models to help us with these difficulties and give us solutions to ease the process.

### A model of onboarding, adapted and extended from Bauer's model, is introduced. As well as an iterative model, which displays the integrative and economizing features of individuals’ experience accumulation and tacit understandings. The third model is based on a change management model named ADKAR which is an acronym for Awareness, Desire, Knowledge, Ability, and Reinforcement.

Structured methodically, this report undertakes a review of pertinent literature on onboarding and knowledge integration, providing a solid foundation for our subsequent exploration. We will delve into the introduced onboarding model and the iterative model, shedding light on their respective integrative features. Furthermore, our findings will be thoroughly discussed concerning the posed research questions, offering valuable insights into the complexities and possibilities of the onboarding process within project teams.

1. Challenges
   1. Making Time

The challenge of time in onboarding new employees within project environments brings to the forefront the critical need to balance competing responsibilities and priorities. In the fast-paced realm of project management, where timelines are often tight and objectives are pressing, allocating sufficient time for onboarding can become a formidable challenge. The urgency to meet project deadlines may inadvertently overshadow the essential investment required in integrating new team members effectively. In such situations, organizations must recognize that the success of a project is not solely contingent on meeting immediate deadlines but also on building a cohesive and collaborative team.

Addressing the time challenge in onboarding necessitates a strategic and intentional approach to interpersonal connections. While it may seem tempting to expedite the onboarding process to save time, this approach can have detrimental long-term effects. Organizations must deliberately carve out dedicated time for meaningful interactions during onboarding, allowing new employees to familiarize themselves with their team members and the project environment. This proactive investment in relationships is crucial for fostering a sense of belonging and creating a positive work culture. Team members need time to understand each other's working styles, strengths, and areas of expertise, laying the foundation for effective collaboration.

Moreover, the challenge of time in onboarding requires a paradigm shift in how organizations view and manage their resources. While project deadlines are undeniably pressing, the human element of project teams is equally, if not more, vital. Adjusting existing work commitments to accommodate the time needed for onboarding is not just a practical necessity but a strategic investment in the overall success of the project. The organizations that recognize and prioritize this investment are likely to reap the benefits of stronger team cohesion, enhanced individual satisfaction, and increased productivity in the long run.

In this context, incorporating accelerated learning methodologies becomes particularly relevant. Accelerated learning involves a highly interactive and experiential training design that engages participants in applying new knowledge immediately. The orientation program exemplifies this approach, focusing on determining which pieces of information new employees can apply immediately and which will be available in other formats and at other times. Through collaborative skill-building exercises, such as teaching human resource guidelines using visual mind-mapping and a fast-paced scavenger hunt, new employees not only acquire essential organizational information but also actively participate in the learning process. This approach aligns with the need for efficient onboarding within project timelines while ensuring that the onboarding experience remains engaging and effective.

* 1. Making Connections

The challenge of fostering connections during onboarding encompasses a multifaceted approach, emphasizing the active facilitation of new team members' integration into existing dynamics. It involves intentional efforts to nurture connections between the newcomer and other team members, extending beyond mere introductions to encompass various interactions and engagements. Establishing and sustaining effective teamwork necessitates a deliberate and conscious approach that encourages ongoing communication, collaboration, and relationship-building.

One illustrative example of addressing this challenge is embodied in the collaborative skills workshop, which strategically commences and concludes with a celebration of diversity. This workshop incorporates an innovative icebreaker that doubles as an accelerated learning activity. Participants, including the instructor, fill out forms assigning points based on gender, job title, professional experience, and whether the new employee is an assignee or a direct hire. The scoring system incentivizes teams to prioritize diversity in their composition, fostering an environment where participants actively seek out members with varied backgrounds and experiences to accumulate the highest team score.

The activities within the workshop extend to teaching participants how to effectively initiate teams. This includes guiding new teams on conducting their first information-sharing meeting using a team orientation process. The session culminates with a unique exercise where the instructor creates a colorful mind map of key points while participants listen to Baroque music, enhancing the learning experience.

Moreover, the workshop's design incorporates lunch breaks as opportunities for new employees to mingle with their managers and connect with other members of their work groups and project teams. This intentional structuring of informal settings promotes natural interactions, contributing to relationship-building beyond the formal confines of the workshop. As the collaborative-skills workshop unfolds over three days, participants not only learn essential skills for effective teamwork but also establish connections that persist, evidenced by ongoing relationships in subsequent crucial projects. This holistic approach underscores the significance of intentional efforts in fostering connections during onboarding, ultimately contributing to a positive team culture and enriching the overall onboarding experience.

* 1. Delegating Responsibilities

The challenge of delegation in the onboarding process underscores the need for a strategic and thoughtful approach to integrating new team members efficiently, particularly when faced with the departure of a key contributor. In such situations, it becomes imperative to assess responsibilities and tasks that can be swiftly transitioned to the newcomer, taking into consideration their skills and expertise. A proactive delegation plan involves identifying tasks that may require additional time for the new team member to handle effectively. Simultaneously, it is crucial to identify alternative team members who can temporarily assume specific responsibilities, ensuring a smooth workflow and optimal utilization of available talent. Flexibility in adapting plans based on the strengths and development areas of the new team member is essential for effective onboarding and maintaining productivity in the face of personnel changes.

The study on delegation [7] and its impact on the onboarding process provides valuable insights into the dynamics involved. Surveys administered to new employees in Finnish municipalities three months after their entry into the organization revealed key factors influencing delegation, including leader-member exchange (LMX), perceived organizational support (POS), role clarity, job satisfaction, and organizational knowledge. The findings emphasized the importance of a positive working relationship between supervisors and new subordinates, as well as organizational support, in influencing delegation practices. Measures such as LMX and POS were employed to gauge the quality of the working relationship and the perceived support from the organization, shedding light on the intricate interplay between supervisor-subordinate dynamics and successful delegation.

Moreover, the study employed a comprehensive set of measures in the new employee questionnaire to assess various facets relevant to delegation. Delegation was measured using a three-item scale, role clarity using three items, job satisfaction with three items, and organizational knowledge with four items. These measures provided a nuanced understanding of the onboarding process and the challenges associated with effective delegation. Control variables such as organization and job rank were considered to avoid confounding study results, acknowledging the potential influence of organization-specific factors and job rank on delegation practices. Overall, the study contributes valuable insights that organizations can leverage to refine their onboarding strategies and enhance the efficiency of delegation practices during this critical phase of team integration.

* 1. Budgeting

Effectively addressing the challenge of budgeting in the context of onboarding requires organizations to adopt a forward-thinking and strategic approach. As organizations formulate their onboarding plans, it becomes crucial to incorporate a dedicated budget reserve aimed at handling potential costs associated with staff turnover. Staff turnover can impose unforeseen financial burdens on an organization, impacting areas such as staffing, vacancies, and training. Having a dedicated budgetary allocation designed to manage these costs is a proactive measure that enhances the organization's preparedness, ensuring that financial resources are readily available to navigate transitions and maintain the continuity of onboarding initiatives in the face of unforeseen personnel changes.

Understanding the components associated with the cost of turnover is fundamental for effective budgeting. The three main elements—staffing, vacancy, and training—highlight the multifaceted nature of turnover costs. Staffing costs encompass the expenses of recruiting and hiring a replacement, which often mirrors the initial costs incurred during the recruitment process. Vacancy costs account for the lost productivity during the period when the position remains unfilled, emphasizing the need for a swift and efficient onboarding process to minimize this downtime. Training costs signify the investment required for the orientation and development of the new employee, recognizing that employees aren't immediately 100 percent productive upon starting a new role.

However, simply focusing on replacement cost estimates fails to capture the complete impact of turnover on an organization. Factors such as lower morale, errors made by overburdened workers, and inefficiencies of both departing and replacement employees are challenging to quantify but contribute significantly to the overall cost. Moreover, high turnover can have cascading effects, especially in industries where safety is paramount. In manufacturing, for example, high turnover may result in insufficiently experienced employees being used to train others, potentially affecting work quality and safety. The Saratoga Institute estimates that when considering all direct and indirect costs, the average cost of turnover is equivalent to one time the annual salary.

To measure turnover and retention effectively, organizations need to move beyond simplistic turnover rates. While turnover rates provide straightforward information, additional measures that delve into the reasons for turnover and retention of employees offer a more comprehensive understanding of the dynamics at play. By adopting a holistic approach to budgeting that considers the multifaceted impact of turnover, organizations can allocate resources more strategically, enhancing the overall effectiveness and sustainability of their onboarding processes. This proactive stance aligns with the dynamic nature of workforce dynamics and organizational needs, contributing to a more resilient and adaptable onboarding strategy.

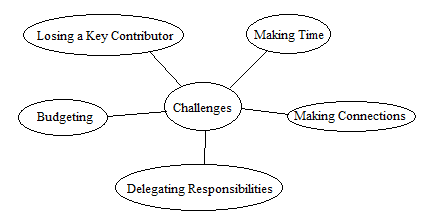
* 1. Losing a Key Contributor

The challenge of losing a key contributor during the onboarding process demands a strategic approach to ensure a seamless transition for the incoming team member. This challenge becomes particularly critical when dealing with team members possessing specialized skills that are integral to the success of ongoing projects. To effectively address this challenge, organizations must cultivate a comprehensive understanding of the missing team member's assignments, essential skills, and other factors contributing to the project's overall success. This requires a meticulous examination of the project landscape to identify specific points where the absence of a critical contributor would be most detrimental.

For team members holding key posts, defined as those posts crucial to the organization's core business, a contingency plan becomes imperative. This involves developing a strategic roadmap outlining the necessary steps to navigate through any potential loss of key personnel. The contingency plan serves as a proactive measure, ensuring that the onboarding process remains resilient and capable of addressing unforeseen challenges. At the senior level, where the strategic importance of key posts is often recognized, organizations typically have succession plans in place, facilitating immediate substitution if the current post-holder departs.

Risk analysis emerges as a valuable tool in quantifying the seriousness of losing key contributors or having key posts become vacant. By employing a systematic approach, organizations can estimate the likelihood of such occurrences and assess their potential impact on critical factors, such as product/service delivery, ease of replacement, replacement costs, and the advantage over competitors. This risk analysis enables organizations to identify 'hot spots'—areas of heightened risk in terms of key people, posts, and employee groups. Systematic analysis helps organizations prioritize and implement targeted retention initiatives that address specific risks and vulnerabilities, justifying these initiatives through the tangible business advantages they bring.

In essence, the challenge of losing a key contributor underscores the importance of proactive measures and strategic planning to maintain operational continuity. By taking a holistic view of the organization's critical roles and contributors, and by implementing contingency plans based on rigorous risk analysis, organizations can navigate the complexities of personnel changes during onboarding with resilience and strategic foresight.



**Figure 1.** Challenges Diagram

Effectively navigating the multifaceted challenges of onboarding necessitates a comprehensive approach that addresses critical aspects such as time management, relationship building, strategic delegation, and prudent budgeting. Allocating dedicated time for meaningful interactions with new team members fosters a positive onboarding experience, laying the foundation for successful collaborations. Focusing on fostering connections within the team is paramount, and adopting innovative approaches, such as accelerated learning methodologies, can further enhance the integration of new members into existing dynamics.

The challenge of effective delegation in onboarding requires strategic planning, particularly when faced with the possibility of losing a key contributor. A detailed understanding of team members' assignments, skills, and critical project factors is essential for developing contingency plans that ensure a smooth transition in the face of unexpected personnel changes. Budgeting considerations play a pivotal role in onboarding success, necessitating the inclusion of reserves to manage costs associated with staff turnover. Turnover costs, encompassing staffing, vacancies, and training expenses, underscore the importance of proactive budgeting to maintain the continuity of onboarding initiatives.

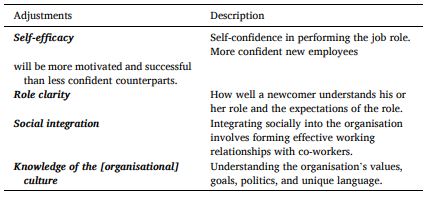
As organizations grapple with these challenges, a strategic contingency plan for losing a key contributor emerges as a key element of onboarding resilience. The risk analysis approach outlined in previous discussions provides a framework for estimating the likelihood and impact of such occurrences, guiding organizations in prioritizing retention initiatives. The upcoming models promise to delve deeper into the intricacies of onboarding dynamics, offering insights and frameworks crucial for developing effective strategies. By embracing a nuanced understanding of these challenges, organizations can optimize the onboarding process, fostering a positive and productive work environment.

1. Introduced Models
   1. Bauer’s Model

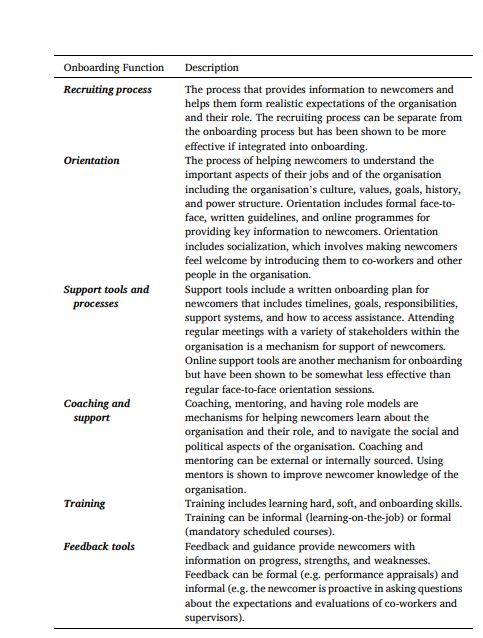
Bauer's onboarding model [4] offers guidelines for bringing people into organizations, suitable for various settings. It identifies six onboarding functions (Table 1) and introduces new employee adjustments (Table 2) as levers that organizations can target to ensure a positive onboarding experience. Bauer's model was chosen for the analysis because it is based on real-world data, is widely recognized, and hasn't been applied directly to onboarding in agile software development teams.

In the organization's recruitment process, a formal and standardized approach is employed for all staff, varying slightly based on the type of position. Long-term recruitment strategies involve hiring students and apprentices who later transition to full-time roles, reducing the onboarding effort for permanent staff. During recruitment, identifying newcomers' knowledge gaps, especially regarding agile approaches, allows tailored support. The orientation process includes comprehensive information packs, fostering socialization, and emphasizing the agile methodology. Support tools, like information radiators and communication tools, aid collaboration, while coaching and mentoring, exemplified through pair programming, ceremonies, and role modeling, contribute to effective onboarding. Training emphasizes immersion and self-study, with feedback mechanisms, such as one-to-ones, code reviews, testing, retrospectives, and sprint reviews, playing a crucial role. Overall, a holistic approach combining recruitment strategies, orientation practices, support tools, training, and feedback mechanisms ensures a robust onboarding process.

Bauer’s method focuses on onboarding new employees in the workplace, but these practices can be translated into integrating new employees into projects and bringing them up to speed.



**Table 2.** Bauer's New Employee Adjustment.



**Table 1.** Bauer's Onboarding Functions.

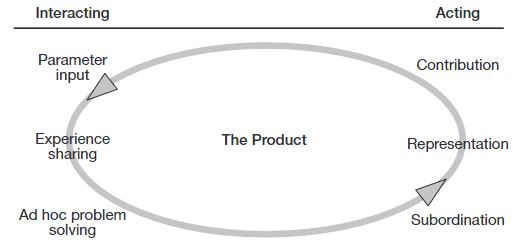
Researchers have identified four key factors, or "levers," crucial for maximizing the success of onboarding new employees. The first lever is self-efficacy, emphasizing the importance of boosting a new employee's confidence in job performance, as this positively influences motivation and success. Role clarity, the second lever, pertains to how well new employees understand their roles and expectations, with clear expectations being vital for optimal performance. The third lever is social integration, emphasizing the significance of building relationships with colleagues and feeling socially accepted within the organization. Lastly, the fourth lever involves knowledge of and fit within the organizational culture, underscoring the importance of understanding the unique values, goals, and language of the company. Overall, these levers contribute to job satisfaction, organizational commitment, and reduced turnover during the onboarding process.

* 1. Iterative Model

The iterative model [2] proposed for onboarding new employees into projects offers a nuanced understanding of the dynamic interplay between interaction and action within project work. The model discerns between instances of interacting, where face-to-face engagement occurs, and instances of acting, where individuals work independently. Project meetings are identified as crucial elements serving primarily for routine communication of project goals and parametric input, constituting what is termed as "experience" sharing. These meetings, while not fostering extensive discussion or knowledge exchange, play a pivotal role in aligning participants' efforts and addressing unexpected challenges through ad hoc problem-solving.

The right side of the model delineates how participants contribute individually to task achievement based on their comprehension of others' roles and their representation of the collective task. This dual process forms an iterative cycle wherein interaction provides the grounding for individual contributions, and reciprocally, individual actions shape the overall system. The model thus depicts project work as an iterative interplay, highlighting the symbiotic relationship between interaction and action. This dynamic interplay enables the fusion of individualized knowledge with explicitly articulated social knowledge, showcasing the intricate dynamics inherent in project work.

The development of this model was grounded in a comprehensive study focused on unraveling the character of project work, member interactions, and the significance of individual work, goals, and knowledge sharing. The resulting case story underwent rigorous validation by comparing it to existing theories, refining it through additional observations and discussions, and obtaining feedback from both project members and top managers. This iterative model stands as a valuable framework for comprehending the complexities of onboarding individuals into project environments, providing insights that can inform effective strategies for integrating new team members seamlessly into project workflows.



**Figure 2.** The Iterative Model.

* 1. Change Management Model ADKAR

The ADKAR change management model [8], developed by PROSCI, serves as a comprehensive framework applicable to various scales of change within an organization, ranging from individual transitions to large-scale transformations. Comprising five key phases—awareness, desire, knowledge, ability, and reinforcement—the ADKAR model aligns seamlessly with project management principles. This alignment is particularly valuable for organizational changes, necessitating a dual approach that addresses both technical/logistic requirements through project or program management and human aspects through change management. Whether applied to a single person, a small group, or an entire organization, the ADKAR model proves versatile, finding practical use in scenarios such as employee onboarding.

The first phase, awareness, focuses on introducing new employees to the organization's vision, mission, values, and culture, emphasizing the importance of their role. The subsequent desire phase aims to capitalize on the initial motivation of new hires, reducing anxiety and providing clarity on potential opportunities and support. Knowledge-building follows, involving a mix of training methods tailored to address identified knowledge gaps, covering operational aspects, compliance, and organizational values. The ability phase shifts towards capacity building, requiring the application of acquired knowledge and the demonstration of capabilities in the actual job context, often facilitated by coaching and mentoring. Finally, the reinforcement phase ensures the sustainability of the onboarding process, promoting employee accountability through performance management and recognition programs.

In addition to the change management aspects, the model incorporates essential project management elements, emphasizing the importance of requirements analysis, personalized design, effective implementation, and post-implementation evaluation. Notably, the model underscores the significance of following the progressive phases systematically for stress-free and successful onboarding. Flexibility is highlighted as a key consideration, acknowledging that individuals learn and adapt at different paces, necessitating customization to suit the diverse requirements of new staff. In conclusion, irrespective of organizational size, the ADKAR model offers a structured and proactive approach to onboarding, contributing to increased employee engagement, commitment, and overall productivity.



**Table 1.** ADKAR Phases and Project Phases

1. Conclusion

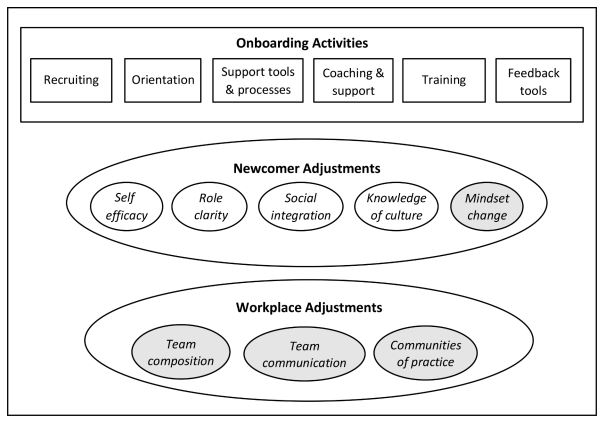
In conclusion, effectively navigating the multifaceted challenges of onboarding demands a comprehensive and strategic approach. The outlined models—Bauer's Model, the Iterative Model, and the Change Management Model ADKAR—provide valuable frameworks and insights for project managers and organizations seeking to optimize the onboarding process.

The challenges of time management in onboarding underscore the need for a balanced and intentional approach, emphasizing the importance of dedicated time for meaningful interactions. Fostering connections during onboarding requires deliberate efforts, as showcased by innovative approaches like collaborative skills workshops. Strategic delegation is crucial, especially when faced with the departure of a key contributor, and a thorough understanding of team dynamics and responsibilities is essential for effective integration. Budgeting considerations, including the incorporation of reserves for staff turnover costs, contribute to the overall resilience of the onboarding process.

The challenge of losing a key contributor emphasizes the need for foresight and strategic planning, with a contingency plan and risk analysis playing pivotal roles. The upcoming models delve deeper into these challenges, offering insights and frameworks essential for developing effective strategies. Bauer's Model focuses on six onboarding functions and emphasizes a holistic approach to recruitment, orientation, support tools, training, and feedback mechanisms. The Iterative Model provides a nuanced understanding of the dynamic interplay between interaction and action within project work, emphasizing the iterative cycle and the fusion of individualized and social knowledge. The ADKAR Change Management Model aligns seamlessly with project management principles, providing a structured and proactive approach to onboarding through its awareness, desire, knowledge, ability, and reinforcement phases.

By embracing these challenges and leveraging the insights from the introduced models, organizations can optimize the onboarding process. This optimization contributes to a positive and productive work environment, fostering strong team cohesion, enhancing individual satisfaction, and ultimately increasing overall project success. The dynamic interplay between time management, relationship building, strategic delegation, and prudent budgeting emerges as a key theme, emphasizing the interconnected nature of these elements in the onboarding journey. As organizations implement these strategies, they position themselves to navigate personnel changes with resilience, adaptability, and strategic foresight, ultimately ensuring the success and sustainability of their projects.

In Figure 3, the comprehensive onboarding model tailored for project teams, with a specific focus on agile methodologies, is presented. This intricate model encapsulates a holistic view of the onboarding process, delineating the suggested activities and necessary adjustments from both the new team members' perspective and the existing team's side. The visual representation in Figure 3 provides a detailed roadmap for integrating new members seamlessly into project workflows, emphasizing the dynamic interplay between onboarding activities and the agile project environment. By offering an understanding of the essential elements involved, this onboarding model serves as a valuable guide for fostering collaboration, reducing friction, and enhancing the overall effectiveness of the onboarding experience within agile project teams.



**Figure 3.** Onboarding Model for Agile Teams

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