Up and Running in 30 Days or Less

How to Plan, Build, and Run A New Hire Training Program That Works

Is your new hire training program broken?

Maybe you have noticed:

- New hires quitting after a few months
- New hires feeling overwhelmed
- Employees taking 6-12 months to become proficient after being onboarded
- Employees frequently asking supervisors for help

Whatever the case might be, the bottom line is that you know things could be better. The traditional approach of running through PowerPoint slides, passing assessments, and sitting through hours of lectures isn't working and you need it fixed.

If that describes you, then you're in the right place. In this eBook, you'll **learn how to build a streamlined training program based on tried-and-true principles for learning and development.** The basic training principles that are taught in this eBook are not necessarily new — but they seem to have been abandoned by most trainers.

In this guide, you'll learn a **5-stage process for building and running a training program** that gets new hires comfortably and competently doing their job in 30 days or less.

The 5 Stages To Building and Running a Training Program

Stage 1: Plan

The key to creating a new hire training program that effectively onboards new employees in 30 days or less is having great digital guides. These digital guides will do just what their name implies — guide employees through completing tasks, answering questions, troubleshooting problems, and making decisions.

Building these digital guides requires disciplined planning and will require you to spend time making decisions about processes and procedures — what to do and how to do it, as well as documenting those processes and procedures so that they are clear and easy to follow.

In this section, I'll walk you through **how to decide which topics you'll cover in training and which resources you need to make to support training.**

Planning Tip + Resource: As you plan what content you will cover during training and what assets you need to create for training, use this template to help you build the program. I'll use this template to build an example training program in this eBook.

Download the template

1.1: Identify your end-users

Who are you going to be training? What are their roles and responsibilities? How much do really they need to know to operate effectively?

Understanding who you will be training is critical to the success of your training program. You don't want to waste time teaching new hires information they already know or start training at a level that's above your new hire's experience.

When you have a clear audience, it helps you set the scope of your training. You know which topics you need to cover and which topics can be left out (or at least covered at a later date).

Examples of your trainee audience

Depending on your business, your training audience could be defined in a variety of different ways. Here are a few examples of the type of audience you may build a Find & Follow training program for:

- **New call center reps** who need to troubleshoot calls about internet routers
- **New branch bank tellers** who need to help customers do routine bank transactions and sell them services
- **New loan officers** who need to manage new and existing loans
- **Experienced truckers** who are new to your company and need to follow your policies and procedures
- **New medical receptionist** who needs to be able to schedule appointments and bill for services

In the example below, we'll choose the audience: **New Medical Receptionist Scheduling Appointments**

Audience: New medical receptionist scheduling appintments

Topic	JTBD	Foundation Course	Supporting Materials	Scenarios to Practice

1.2: Identify topic areas and tools

When we work with clients and ask them what people need to learn, a common (though tongue-in-cheek) response is, "Everything!"

Preparing training materials for "everything" is overwhelming, which is why we start with one topic at a time.

Identify one topic your learners will need to learn about.

Below are examples of some topics:

- **Software tools:** CRM, inventory system, ticketing system, patient management software
- **Business operation categories:** Inventory, billing, scheduling
- **Products:** Checking accounts, insurance plans, SaaS products
- **Troubleshooting:** Router issues, error codes, access controls

Just pick one for now and continue with the steps. Toward the end, you're going to come back and repeat this until you get a complete list of topics.

In the example below, we'll start with the topic: Patient Scheduling.

Training Program Planner

Audience: New medical receptionist scheduling appintments

Topic	JTBD	Foundation Course	Supporting Materials	Scenarios to Practice
Patient Scheduling				

1.3: Identify the 'jobs to be done' for each topic area

Now that you have a topic, write down the actions an employee would do related to that topic. These are the "jobs to be done" or "JTBD." Each JTBD is something an end-user needs to do. This could be:

1. Requests to respond to
2. Tasks to perform
3. Problems to solve
4. Information to reference

Note: Focus on what they need to DO, rather than what they need to know. Whenever we run workshops where we build out the training program, we'll ask what employees need to do and we often get the answer, "They need to understand ______" or "They need to know______."

For now, we don't care what they need to know or understand. We only want to write down what employees **need to do.**

Continuing with the example of a medical receptionist, a list of actions related to patient scheduling might look like this:

- Schedule patients
- Check patients in
- Add insurance
- Review insurance authorizations
- Leave notes related to patient interactions
- Update patient demographics
- Update insurance

The more complete your list of actions, the better your training will be. Here's how it might start to look:

Training Program Planner

Audience: New medical receptionist scheduling appintments

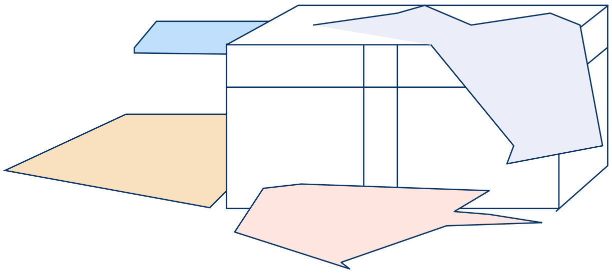
Topic	JTBD	Foundation Course	Supporting Materials	Scenarios to Practice
Patient Scheduling	● Check patients in ● Manage patient billing ● Review patient balance ● Add and bill insurance ● Review insurance authorizations ● Leave notes related to patient interactions ● Update patient demographics ● Update insurance			

1.4: Define the context

In this step, you need to determine how you're going to **explain the topic so that your learners understand the what, the when, the why, and the overall purpose.**

Your employees need context to do their job. That's because your brain is like a closet. It creates mental models for understanding and interpreting information.

If you just begin throwing information at employees on how to do their job without providing them with some context and getting a basic understanding of the big picture, their mind organizes the information like a disorganized pile of laundry on the floor.



Alternatively, if your employees can understand some basic concepts, processes, and context, then their minds can organize information, just like clothes neatly organized in a closet.

Providing your new hires with context **helps them build a foundation so that it is easier to learn new information.** As they build on the foundation, it is easier for them to pick up on concepts because they can fit them into the bigger picture.

For example, if I were creating a presentation about the patient management system, I would have the following outline:

- Overview of the patient management system
- Managing patient information
- Appointments
- Insurance
- Billing
- Patient balance

Training Program Planner

Audience: New medical receptionist scheduling appintments

Topic	JTBD	Foundation Course	Supporting Materials	Scenarios to Practice
Patient Scheduling	● Check patients in ● Manage patient billing ● Review patient balance ● Add and bill insurance ● Review insurance authorizations ● Leave notes related to patient interactions ● Update patient demographics ● Update insurance	● Welcome to the course! ● Overview of the patient management system ● Managing patient Information ● Appointments ● Insurance ● Billing ● Patient Balance		

In the example above, each outline item would be a separate module (or video if you have the resources) that briefly explains the overall topic.

Stage 2: Develop

Now that you have a plan in place for the topics you are going to cover in training, it's time to think through the resources you need to prepare.

Training requires a variety of different support materials that you need to prepare ahead of time. Luckily, these resources can be used over and over again. The main resources you want to prepare include:

- Foundational presentations and/or courses
- Digital guides and job aids
- Practice scenarios and activities

2.1: Create foundational presentations and/or courses

Your foundational presentations and/or courses are built around the context you defined during the planning stage.

For each topic you've defined, **prepare a presentation or self-paced course that will take no more than 10-20 minutes** to get through.

The presentation/course will NOT go into the nitty-gritty details of the topic. You do not need to show every click, every detail, or every step of a process. You are showing them the forest. You are providing them with the big picture so it is easier when they use your digital guides in the future.

One advantage of creating mini-courses is that learners can repeat the courses. Most likely, learners will forget some concepts and need to go over them again. Because you've made courses and included short videos, learners can re-watch them without having you repeat yourself 100 times.

When to make videos for a foundational course

If you are regularly onboarding employees to do the same type of job (e.g. contact center reps or front-line employees), then turn your presentation into a mini-course (i.e. a series of videos and/or slides that explain the concepts).

That way, you create a resource that enables you to repeat the training program and your learners get a consistent experience every time.

Example script for a foundational course

Essentially, your foundational courses are explainer videos. The purpose of the explainer video isn't to dive into all the nuances of a product, service, or concept. Its only purpose is to help a learner understand the big picture of what's going on.
Watch an example explainer video here

An example script of an explainer presentation for the scheduling portion of the patient management system mini-course:

> “When a patient calls to schedule a doctor’s appointment, you don’t want to jot it down on a paper calendar. Otherwise, it would be a mess whenever a patient wanted to reschedule. Also, if the paper calendar was at the office and you wanted to do some work from home, you wouldn’t be able to. That’s why you schedule patients in the patient management system. It’s a web application that has a calendar and an easy way to schedule, reschedule, and cancel patient appointments. You can also use it to send paperwork and reminders to patients so that they come on time and are prepared.”

Or you could do an explainer script in the format of a story:

> “On Monday, Wanda started feeling knee pain after walking up four flights of stairs. She wants to see Dr. Able to get it checked out. So she calls up the phone number to schedule an appointment. She wants to be seen on Thursday at 3. You look at the doctor’s available appointments in the patient management system and see that the only available times are Thursday at 10 a.m. and Friday at 1 p.m. After reviewing the times with Wanda, she chooses Thursday at 10 a.m. So, using the schedule app, you pick that time for Wanda and send her all of the paperwork she needs to fill out before her visit. The next day, Wanda realizes 10 a.m. won’t work and she calls to reschedule her appointment. You pull up her appointment and move it to a time that works for her.”

In both examples, you aren’t going into great detail about how to use the system or go through the process. You're simply providing some context to **help the learner understand the what, the why, the when, and the purpose.**

If you create a collection of videos and build out a mini-course, you now have a consistent and scalable way to explain the topic to a learner. Whether they’re in a physical classroom or working from home, they can receive the same experience in hearing about the topic.

2.2: Document digital guides and job aids

The purpose of streamlining your training program is so that employees can be self-sufficient. A critical piece of the puzzle is to create job aids that help employees do the actions or JTBD.

If the action is to schedule a new patient, you should have an easy-to-follow procedure that explains how to schedule a new patient.

During the activity, employees should be able to pull up the procedure and follow it to schedule the patient.

In your Training Program Planner, list those "Supporting Materials" you need to create. **These are the policies and procedures you need to be documented so that your employees can be self-sufficient.**

Document your resources so that all your employees will need to do is find and follow your resources to complete tasks.

These resources could be:

- Job aids
- Step-by-step instructions
- Policies and procedures
- Reference guides
- Call flows
- Checklists
- Call center scripts

Training Program Planner

Audience: New medical receptionist scheduling appintments

Topic	JTBD	Foundation Course	Supporting Materials	Scenarios to Practice
Patient Management System	● Check patients in ● Manage patient billing ● Review patient balance ● Add and bill insurance ● Review insurance authorizations ● Leave notes related to patient interactions ● Update patient demographics ● Update insurance	● Welcome to the course! ● Overview of the patient management system ● Managing patient Information ● Appointments ● Insurance ● Billing ● Patient Balance	● How to find an existing patient ● How to create a new patient record ● How to schedule patient ● How to reschedule patient ● How to cancel patient appontment ● How to add billing information ● How to add insurance information ● How to look up insurance information ● How to view patient balance ● How to pay patient balance ● How to view reason for insurance denial	● Find an existing patient ● Create a new patient record ● Schedule patient ● Reschedule patient ● Cancel patient appontment ● Add billing information ● Add insurance information ● Look up insurance information ● View patient balance ● Pay patient balance ● View reason for insurance denial

Note: These are NOT training guides. These are the actual procedures that employees will use after training is over.

Think of them like recipes. When a situation comes up, employees should be able to pull up the recipe and follow along to perform the task. Read this article for **how to write standard operating procedures your employees can follow without making mistakes.**

Create a knowledge base

When you document your procedures to create self-sufficient employees, you end up with a lot of documents. You need a way to **quickly create, store, and share those documents** with the employees in your company.

The general rule is this: Use whatever works best to create your job aids and organize them in a way that employees can easily pull them up. Some document/knowledge management systems include call flow software, document library, intranet, knowledge base software, wiki, etc.

We recommend using a knowledge base to manage your job aids and other resources. It is a one-stop shop for information that makes the guides easily accessible for your employees during and after training.

See Ultimate Guide to Knowledge Bases

2.3: Plan practice activities using realistic scenarios

The mini-course explained in the previous step won't teach employees how to do anything. It will just provide context — a closet — that will help them understand how the pieces fit together.

But as we've been pointing out the entire time, employees need to learn how to actually do their job. After training, they need to be able to click through information systems and perform transactions. So, they do need to learn how to work through the nitty-gritty details.

That's why this step exists.

You will need to identify realistic activities that employees can role-play during "classroom" training that will allow them to practice the actions you identified.

It can be as simple as, "Janice calls to schedule an appointment for Tuesday at 4 p.m." And the scenarios can gradually increase in complexity to be, "Steve calls in asking why his insurance didn't pay for the medical services."

You will do these same activities whether you are meeting in person or virtually.

Training Program Planner

Audience: New medical receptionist scheduling appintments

Topic	Actions	Foundation Course	Supporting Materials	Scenarios to Practice
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During the activity, employees should be able to pull up the procedure and follow it to schedule the patient.

For each topic, try to **come up with 5-10 realistic scenarios.** Write them down and include details that will be important as part of the scenario.

In the example above, your scenario could be written like this:

> **Action:** Schedule a patient appointment
> **Situation:** Janice calls to schedule an appointment for Tuesday at 4 p.m. It's her first appointment. Her insurance is Aetna. She can only schedule time on Thursday between 10 a.m. and 2 p.m. She is experiencing knee pain after falling down a curb.
> **Difficulty Level:** Easy
> **Outcome:** Scheduled appointment following scheduling procedure

Repeat the planning and developing steps for all topics

Okay, that was for one topic. Now go back through the planning and development steps for each topic you want to cover during training.

By doing each of these steps for each topic, you will have clear actions for your new hire training curriculum. Your Training Program Planner becomes your checklist of action items.

Training Program Planner

Audience: New medical receptionist scheduling appintments

Topic	JTBD	Foundation Course	Supporting Materials	Scenarios to Practice
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Patient Services	● Answer questions about what services are done ● Blood tests ● Exams ● Check ups ● Pregnancy tests	● Welcome to the course! ● Overview of services ● Blood tests ● Exams ● Check ups ● Pregnancy tests	● Blood test overview ● Exam overview ● Check up overview ● Pregnancy test overview	● Explain what a blood test is ● Explain what an exams is ● Explain who needs a blood test ● Explain who need an exams ● Explain what's involved in a pregnancy test ● Explain various types of check ups

2.4: Define the curriculum

Now that you have all of the topics covered, you have the pieces you need to create a great training program. All you have to do is **assemble them in the proper order.**

As you prepare the program, think of how the topics complement each other and build on one another. Which pieces need to be understood first?

In other words, which elements are fundamental? Which are new hires required to understand first?

In other words, which elements are fundamental? Which are new hires required to understand first?

In the example of a medical practice, it would make sense to cover the topics of what the doctors do, what the patients need, and the overall process of being seen.

It would also help to understand the process of patient billing and how insurance works.

Then you could jump into the patient management system, then go into the medical records system, and so on.

Each policy, procedure, or topic builds on the other. Start with the most basic topics and build on those.

Put everything in order and you have your curriculum.

What have you got?

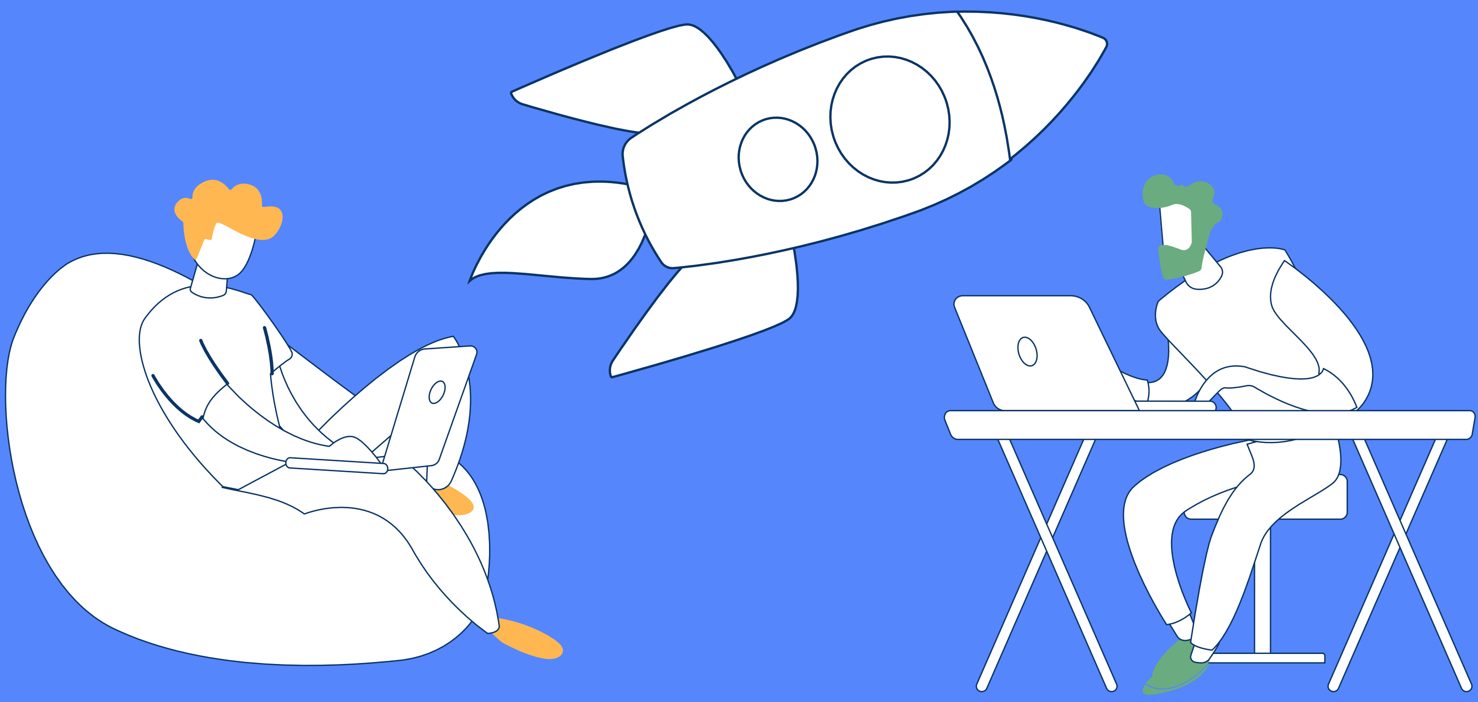
Now that you've gone through those first two stages, you have built your training program.

1. You have **outlined all of the JTBD** that employees must be able to do.
2. You have **created a series of presentations (or mini-courses)** that explain the context of those actions and help employees understand what it is they're doing.
3. You've got **job aids** and **procedures** that help employees do the JTBD.
4. You've come up with a list of **realistic activities** that employees will practice so they can learn how to do those actions.
5. You've **put them in the proper order** so that employees can start from the beginning and work their way through, establishing a solid foundation and building on top of that.

You have a training program that is like a factory. If you're training new hires, they start as new hires and come out the other side with an understanding of what they need to do and they are able to do their job.

Now, you are ready to run a new hire training with your Find & Follow curriculum.

Stage 3: Pilot



Every program needs a pilot group. Did they test flying airplanes by filling a Boeing 737 full of hundreds of passengers? Do bakers and chefs share their recipes before they are perfected? No!

Now that you've built your training program and the accompanying resources, it's time to test it out. **This is both an opportunity to evaluate the materials you've prepared and train the trainer.**

Nobody gets everything perfect the first time around. The pilot training program is a chance for you to work out the kinks, identify areas that need refining, and make adjustments so you are ready come launch day.

Ideally, you can pilot your program with a small group of employees. Your pilot training program would allow you to test the digital guides and make sure the activities are realistic. This will give you the full picture of how well your program trains new hires on doing their jobs. However, you can also have different employees pilot different parts of the program.

3.1: Perform User Acceptance Testing (UAT)

After drafting your documents, test their completeness and effectiveness. **Select a few employees to test out the guides you've created.**

Don't just have your employees review the guides. Have employees take a live call or do a real procedure. On the call, have them follow the instructions in the guide verbatim. If they deviate, ask them why. Is it because they are doing it the right way and the instructions are incorrect?

Watch them follow your procedure. You can do this in-person or virtually.

Take notes on what is missing and where the employee gets stuck while following your guide. **Listen to employee feedback.**

The idea is you test them out to make sure people can follow them and if they follow them they are doing it all correctly. There are no missing steps anywhere.

If they get stuck or make mistakes, the guide is not complete and it needs to be revised before going live. If your employees complete the procedure perfectly, the guide is ready for use during training and launching to your team.

Some different resources and aspects you are evaluating during UAT include:

- Employee's understanding after completing courses
- Completeness of documented procedures
- Employee's ability to find the appropriate help guide
- Employee's ability to navigate your document management system

3.2: Update resources to fill in the gaps

The UAT will reveal missing content and confusing directions. **Take into consideration any feedback you received from your pilot employees.**

Remember: Your employees are the ones who are going to be using these guides daily, so you want the guides to be written in a way they understand — not what corporate headquarters "feel" is best.

If they struggled to find the resources, optimize your articles for search. Update the titles of your guides so they use the language your employees use to search for them.

Reorganize your knowledge base or other document management system so that it is more intuitive for employees to click around and find what they need.

Stage 4: Launch

Now that you've got the pieces, let's talk about how to use them to develop new hires into employees who can do their job in 30 days or less.

This is completed in three phases called the Find & Follow Training Framework. With Find & Follow, you will **use the assets you create to execute your training program.** The three stages are repeated for each topic (or area of learning) that you cover in training.

Here is **how to run an employee training program using the 3-stage Find & Follow Training Framework.**

Part 1: Provide foundational explanations for each area of learning

During the first one or two days of training, you're going to do ice breaker activities and maybe have different people from your company come in to talk to your new hires.

Then, when you're ready for them to get to work, **start by having learners go through the foundational explanations (either listening to the trainer or completing a foundational course that covers one specific topic).**

This phase is for you to explain the basics of a topic and provide context for what your new hires will do in this process or procedure.

Unless you're trying to train hundreds of employees at once, don't worry about doing a written assessment after they complete this segment. Instead, ask some comprehension questions and let your employees talk it through. You can even ask employees to practice teaching what they just learned to somebody else.

At this point, you don't care if employees can actually do anything with the knowledge. You're just **working towards a big-picture understanding and comprehension.** While they should learn and maintain some aspects of the explanation, don't worry about them memorizing all of the details.

Need help planning your content for training?

Work with a content planning coach in our Content Planning Workshop to help you figure out what information you need to store in your knowledge base to help with your training curriculum.
Learn more about the Content Planning Workshop

Part 2: Train new hires on how to use digital guides

After you've introduced new hires to a topic, then it is time to train them on how to use the digital guides. This involves:

1. Teaching them how to find the digital guides in your system
2. Teaching them how to read your guides

As you built your training program, you created step-by-step procedures, reference guides, checklists, and job aids. You need to teach your new hires how to read those guides. While reading through guides seems simple and obvious, it's not. Employees are not used to reading instructions and their "muscles" are usually pretty weak.

It's also a time for them to gain clarity on the nuances of your digital guides: What do the words in italics mean? What do the call-out boxes mean?

Your new hires need to understand your documentation style guide so it is easier for them to skim the guides while they are handling a procedure.

In general, you can estimate **about 30-60 minutes for this stage.** Once you've been through a few topics and rounds of teaching Stage 2, this will be faster because your new hires will be more familiar with the guides.

Read through guides together

Present a question related to the training topic and ask employees to find and open a guide that would answer it. Then have employees talk through the resources the first time through. When appropriate, point out what each piece of the guide means and how to properly read the guide.

At the beginning of training, the first time learners pull up the procedure, you only have two goals:

1. For them to find the right procedure
2. For them to read it and understand the procedure

They don't need to navigate through any systems or pretend like they're on a call or interacting with a customer. Just have them find the procedure and talk through it.

If you have several learners, **have each of them pull up the procedure and take turns talking through it out loud, asking questions, and explaining things in their own words.** This will help you determine whether they are understanding the procedure or not.

Avoid the temptation to jump in. If the answer to their question is in the procedure or job aid, ask them to read it again.

Reiterate that the guides are your support system

This is usually a new experience for employees. They're used to being spoon-fed everything by teachers and trainers.

As you first go through the procedures, they are probably going to skip around, miss important details, etc. We've literally had to tell employees, "Just follow the steps. They tell you everything you need to do."

Your employees need to learn how to find the right resource and rely on them. If they can do that, then they will successfully be able to do their job after training is over without having to bother people every few minutes asking them what to do and how to do it.

Navigate through the systems

After your learners have walked through several guides and have become proficient at following the steps in your job aids and procedures, the next step is to get them to click around in your systems.

Again, you will be tempted to demonstrate all of the clicks and steps on your screen. But at this point, they'll have already viewed courses/presentations that included brief videos of the systems they'll be using. So they're already familiar.

The next step is to have learners follow your job aids and procedures as they click through the systems and fill out dummy content. **Go through your questions again but this time have them do the clicks and the field filling out.**

This will take a while at first. Learners need to get used to the navigation and putting things together. But after you go through 12-15 activities, they'll be much more proficient and you'll begin to get through the scenarios much faster.

Tip: Figure out a way to get your learners into the systems so they can try them out. **Either create a sandbox or dummy data that they can view and tinker with.**

Part 3: Practice activities where employees find and follow digital guides

Hands-on experience is the most effective method for training new employees, but it can be challenging to incorporate hands-on learning into your curriculum.

Luckily, now you've got digital guides that walk employees through all the steps. So now, you can run hands-on training by having employees use those guides instead of using you. Not only does this scale better, but employees can also use the guides after training is over.

Once your learners have a basic understanding of a given topic, it's time to go through some realistic activities while using your guides so employees can apply their knowledge.

Your new hires will role-play realistic scenarios. Ideally, you will **have a list of 5-10 situations to practice for each topic.**

> **Note:** this approach to training will be quite new to most trainers as they prefer to have employees memorize information. But it's not possible. There is simply no way your employees will be able to remember everything. That's why we go with the more realistic approach of teaching employees how to use your digital guides to respond to scenarios.

If you needed to train cooks on how to prepare 300 different meals, would you focus on having them memorize all the recipes?

No! You would show them how to use the recipe book to create dishes.

It's not that different for your employees. During any given week, they will have to handle hundreds of different situations. And the processes, policies, and procedures are changing all the time. Asking them to keep all of that straight is a very tall order.

Make it easier on you and them by teaching them how to use your resources to do their job. And if your resources aren't very good (i.e. easy to follow or easy to use), then **making them easy to follow should be your #1 priority.**

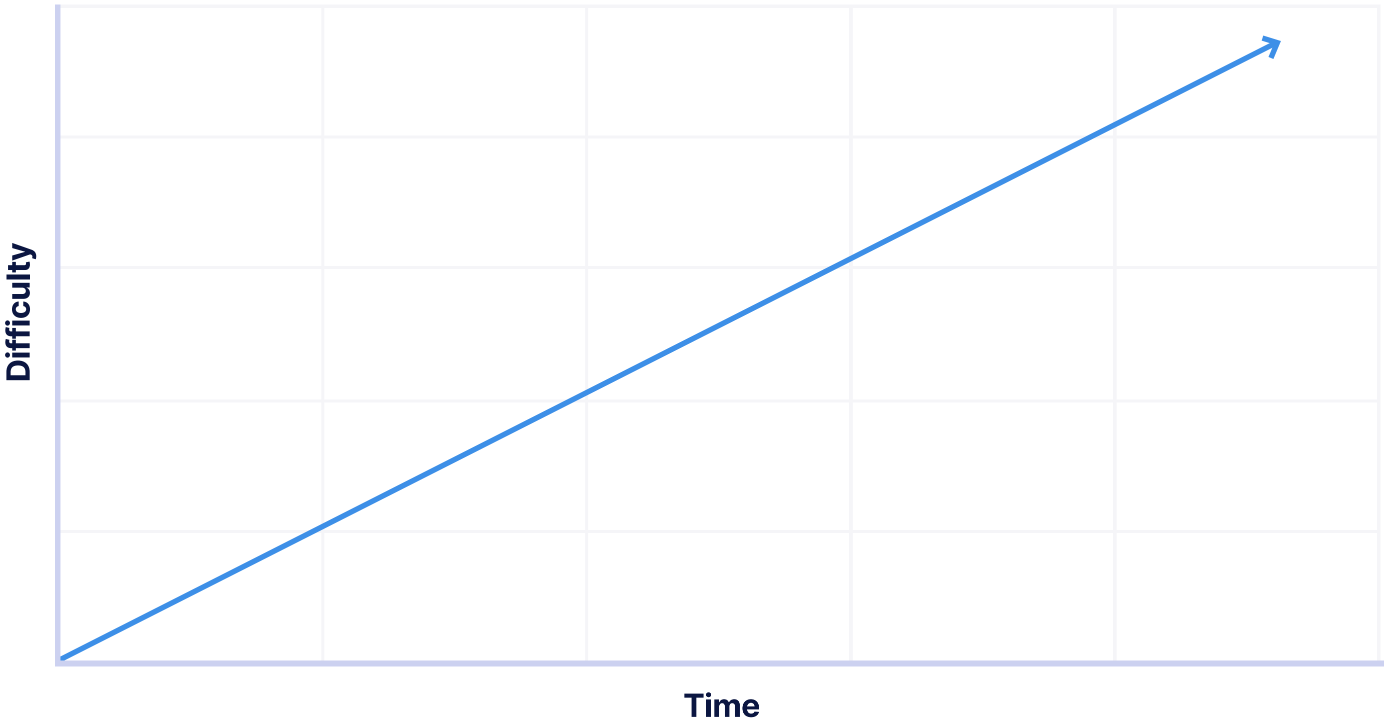
Gamify the activities: Start easy and increase the difficulty

It's important to start easy. It's tempting to want to kick things off with a curveball. But that will only discourage employees.

If you've ever played a video game, you're familiar with the idea of starting a game off really easy and then gradually increasing the complexity for each level.

In the first level, you're just learning the basics. How to move forward, how to jump, how to smash bricks with your head and get mushrooms to grow larger.

That's how basic you want to begin with your reps.



Don't throw in crazy situations at first. Go through vanilla scenarios that are straightforward for the first several days. Continuing with our example of the medical office, you might start with questions such as:

- What does your medical facility do?
- Where are you located?
- Can I bring my kids with me?
- What's your rescheduling policy?

As you go through scenarios, DON'T jump in to rescue learners. Let them find the corresponding job aids to help them out.

Eventually, throw in curveballs. What should they do in this situation? Or that situation? You should have job aids and procedures that help them handle the curveballs.

Expand practice experience

Continue to practice these realistic scenarios by expounding on the situations and adding in skills.

Once your trainees are comfortable following the procedures, add in soft skills. That includes active listening, filling in the silence by explaining what they're doing, and taking control of the situation.

Scenario example

At this point, your learners have gone through your presentation or mini-course and have a general idea of the context of what's going on. Continuing with the example from above, they just learned about patient scheduling.

You've just presented them with a scenario:

> Janice calls to schedule an appointment for Tuesday at 4 pm. It's her first appointment. Her insurance is Aetna. She can only schedule time on Thursday between 10 a.m. and 2 p.m. She is experiencing knee pain after falling down a curb.

At this point, your learners should navigate to your knowledge base and pull up the job aid or procedure and follow the steps to schedule this appointment.

Transition from Part 3 to the job

The final step of Part 3 is to have new hires practice doing actions in real-time. If you are training customer-facing employees, you are going to pretend to be a customer calling in or standing at their desk.

At first, don't give them a hard time or make them feel pressured. That's not the point of this. You just want to get them used to taking a situation and efficiently finding the right job aid and following it.

Gradually, you can add elements that make them feel some pressure. If you're training call center agents, be somebody who is unhappy with service or isn't clear on what they're asking for.

This transitions smoothly into taking real calls or performing real tasks.
Learners take live calls and perform real job tasks situations with somebody close by in case they get stuck
At this point, your learners have gone through mini-courses and practiced dozens (or hundreds) of scenarios. They will be ready to handle real scenarios. In call centers, this part of training is called nesting.

But no matter how prepared learners are, they will be nervous. It may take three real interactions/tasks or it may take an entire week for them to get over their nerves. Everyone is different. But they will get over them.

While learners are working through their nerves, they will want to make extra sure that they are doing things correctly. So have somebody with them who they can reach out to with questions.

> **Training Tip:** If learners have questions, and the answers are in job aids and procedures, make sure to point the learners back to the resources. Don't make them feel like they must rely on you for answers. Otherwise, they will be dependent on you for help and you will undo everything you were working towards during the training program.

Stage 5: Optimize

Once you've launched your Find & Follow training program, the work isn't over. (Though you should pause and give yourself a high-five because that was a lot of work.) Get ready to rinse and repeat.

There are two ways to gain insights on how to best optimize your resources:
(1) through observations and notes during training and **(2) through analytics and reports.**

5.1: Training observations and feedback

During training, you will probably have noticed several gaps in your program. Maybe there's a new course you'd like to create. Maybe a job aid or procedure wasn't complete, didn't exist, or wasn't accurate. Or maybe a realistic scenario was confusing when it didn't need to be.

Make your updates for next time.

Foundational courses

Keep your course videos short and focused on high-level processes and concepts. **If they're short, they're easier to update or replace.** And if they're focused on high-level processes and concepts, then they won't get outdated as quickly.

Digital guides and job aids

Keep your materials up to date so you are always ready to go. That's why we encourage you to use the job aids and procedures that employees use every day. **Those MUST be kept up to date.**

If you use the same guides that employees are using each day, then when you use them during training, you're using the latest and greatest.

Practice scenarios

As employees encounter new scenarios on the job, add those scenarios to your role-playing scenarios. This will help provide more real-life training opportunities for future new hires.

A great way to gather scenarios is to **listen to actual calls/call recordings and read real emails** that include requests or questions. You don't have to make up scenarios — just pull from what you've already got.

5.2: Analytics and reports

Besides observations made during training, you will also receive insights on how to optimize your digital guides and courses by having a knowledge base or other knowledge management system that has user analytics.

Depending on the system you are using for courses and your documentation, you could have:

- Search reports
- Usage reports
- Course reports
- Etc

Having insights into how your guides are being used is critical to optimizing them for the end-users.

Train more knowledgeable, consistent, and efficient employees in 30 days or less

Creating and setting up a new hire training program takes a lot of discipline and time. This 5-stage training program helps you prioritize how you will enable your employees to be proficient and self-sufficient in less time.

When you use the Find & Follow Training Framework along with a ScreenSteps knowledge base, you **can onboard new hires to be more knowledgeable, consistent, and efficient in 30 days or less.** Combined with our expert training coaches, you have the complete toolset to implement this five-stage employee training program.

A ScreenSteps knowledge base makes it fast and easy to write job aids and keep your articles up to date. Your employees can find the articles they need in as few as two clicks.

Ready to implement this new hire training methodology?

Whether you want to build the program on your own or want expert support, schedule a conversation with a ScreenSteps expert. In the meeting, you'll learn more about the five stages of new hire training and the Find & Follow Training Framework.