Onboard New Employees **75% Faster** With This **7-Step** Plan

Cut Training Costs | Grow Faster | Reduce Turnover

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INTRODUCTION

> *Following these seven steps, new employees feel confident and are at production levels within 10 days of being on the job, and experts at doing their job within 30 days. It's been a fantastic experience.*
>
> Stephanie, Trainer at a Contact Center

Stephanie works for a Business Process Outsourcer (BPO) that handles customer support calls for large companies. Last Fall, Stephanie was able to help **40 new hires transition to their role as call agents** who can handle any customer calls in only 10 days (75% faster than usual).

Vic is a consultant who lives in Florida. Two months ago, he was able to help his client's workforce of **150 employees transition** from using a legacy platform to using Salesforce.com in four-days (83% faster than usual).

Owen is a consultant in the United Kingdom. He was able to help his client's workforce of **200+ employees** transition from using legacy platforms to using Salesforce.com in only one day of in-person training.

Chris is a business owner out of New York who regularly helps new hires make the transition to their role of productive employees who can run the business.

Each of these individuals helped employees in their organization successfully transition to a new way of doing things. For some, it was the transition to full-time employee (new-hire onboarding). For others, it was the transition to a new system/platform (e.g Salesforce implementation). In both situations, they followed the transition plan that I'm about to show you, and they dramatically improved their results.

The focus of this book will specifically be on transitioning new hires to productive employees. (We have another book specifically for transitioning your workforce to the Salesforce platform.)

Our promise to you is that if you implement the transition plan you are about to read, you will see dramatic results. So, if you're ready to transform how your organization brings on new talent, let's get started!

ABOUT THE AUTHOR

Jonathan DeVore has helped hundreds of clients create training materials. He's seen all the mistakes that keep employees from successfully transitioning to a new job, new platform, or new role within a company.

The 7 Steps

During the past 10 years, Jonathan has studied what works and what doesn't when it comes to new-hire training. This book is a compilation of how the most successful teams are bringing on new employees to be productive contributors within the first week of being hired.

The seven steps are a combination of best practices from the minds of Cathy Moore and Julie Dirksen, and the experiences from amazing trainers who are on the font lines doing this everday.

ScreenSteps

Jonathan has worked for ScreenSteps for the past seven years. He works with customers who need to train and support employees and customers.

Mind the Gap

Mind the Gap

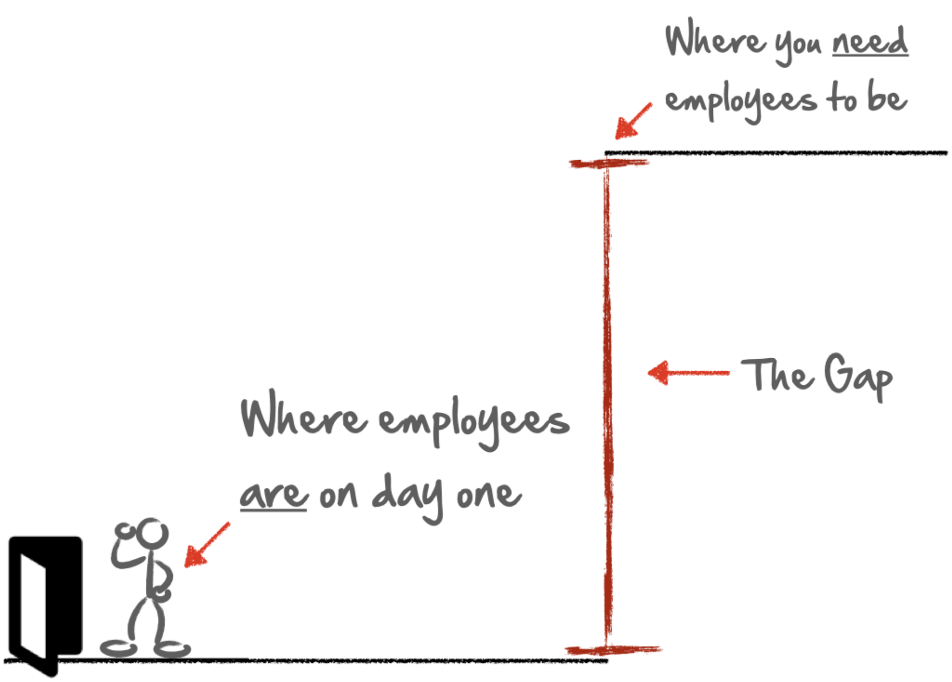
If you ever use London's public transit system (nicknamed the Tube), you'll periodically see signs and hear a voice telling you to "**Mind the gap**."

This reminder helps commuters pay attention to their surroundings when transitioning from the platform to the train car (or vice versa). There is often a gap between where they were and where they are going.

Mind the New-Hire Gap

This same message is equally important for when new hires walk through the door.

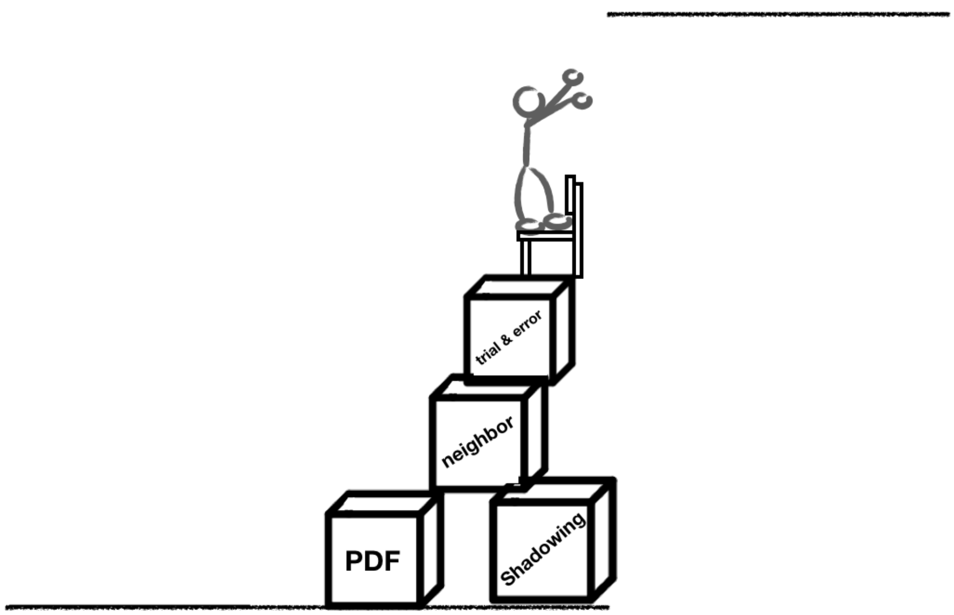
You must mind the gap.



Typical approach #1

A lot of organizations have **no plan** in place to help new employees bridge the gap, and often just leave employees to fend for themselves.

Managers tell new employees to look through the wiki for old PDFs, webinar recordings, or to shadow their neighbor for a couple of weeks.



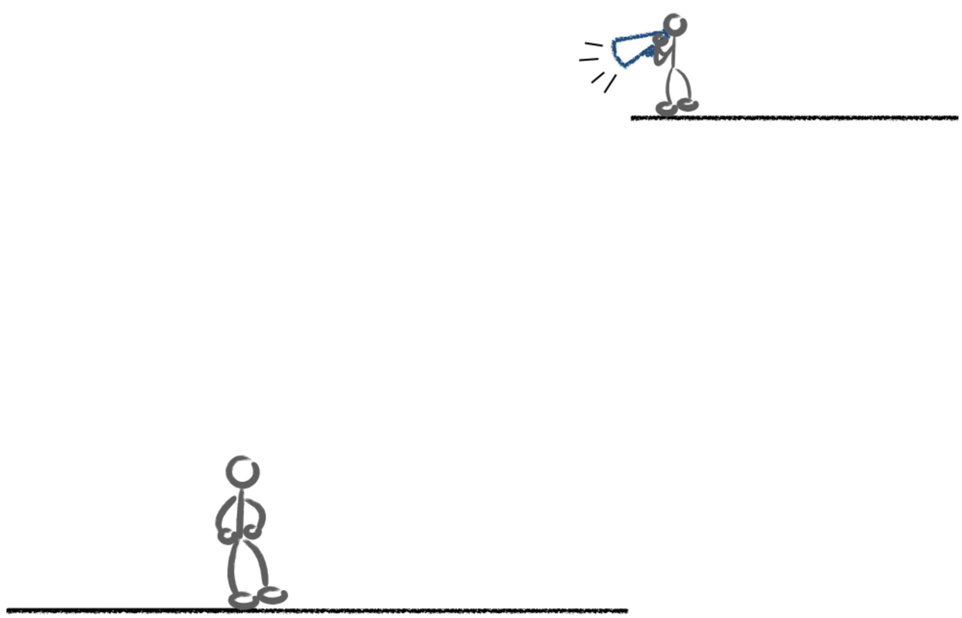
This approach doesn't work very well. It takes a long time for new employees to figure things out and there are costly mistakes made along the way.

Typical approach #2

Other organizations bring in HR to help with the initial transition. And while HR has noble intentions, HR doesn't have the resources to transition new employees into productive employees.

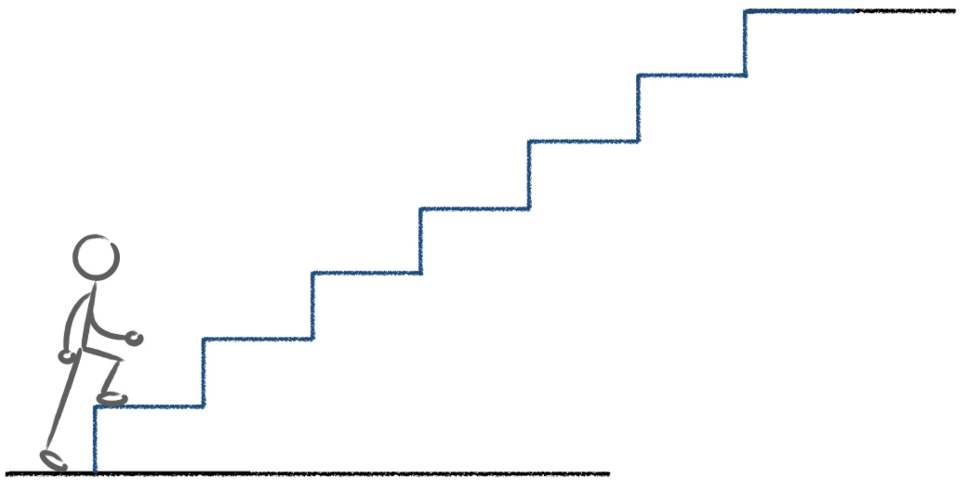
Most of the time, HR does not know the day-to-day procedures that must be followed.

So their efforts usually consist of lectures and high-level explanations. Those are good starts, but they aren't enough to successfully transition new hires into productive employees.



The 7-Step Approach That Works

What you need are steps that help new hires gradually transition from being “unable” to being “capable, confident, and productive.”



Tip! Build steps to gradually take your employees from one level to the next.

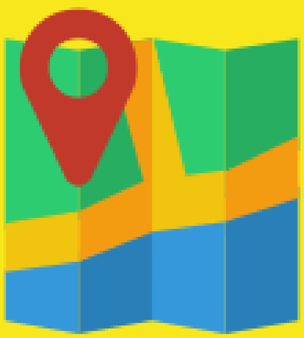
This is how Stephanie **transitioned** new employees to their role as support agents who can answer any customer question, in only 10 days.

It’s how Vic, Owen, and Gretchen helped entire departments transition to using a new platform in less than one week.

And it’s how you are going to help your new hires transition to their role of being productive employees, 75% faster than you ever have before.

Let’s look at step one.

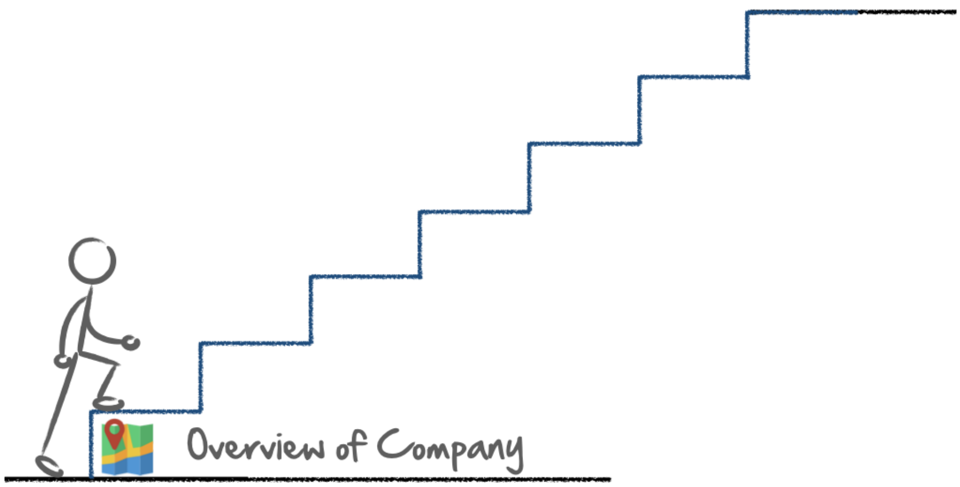
Step 1: Overview of Company



Step 1 – Overview of Company

New employees may not completely understand what your company does, so you need to provide an overview that explains:

- Who your customers are
- The problems they are experiencing
- How your company helps them out
- Where the new hire fits into the picture



Tip! Use ScreenSteps Courses to explain what your company does so that employees all get a consistent experience.

This does not need to take all day. In 60 minutes, you can share more than enough information about how your company helps the world go round. If you spend any longer than that, it means you're probably starting to just talk about things that *you* think are cool.

Example Overview of a Company

Let's pretend that your company is Dunder Mifflin and sells paper. Here's a simplified version of an overview that you would share:

Tip! Start with a simple overview so you can build confidence in your employees.

You could say that "Dunder Mifflin serves businesses by offering high quality paper at a discount. We mostly serve law offices and accounting firms since they use a lot of hard copies.

"Your role is to coordinate the delivery of the paper."

Now, there might be a lot more that Dunder Mifflin actually does, and there are several other roles that a new hire might fill – you don't have to cover that here. This is step one and your main focus is to build confidence.

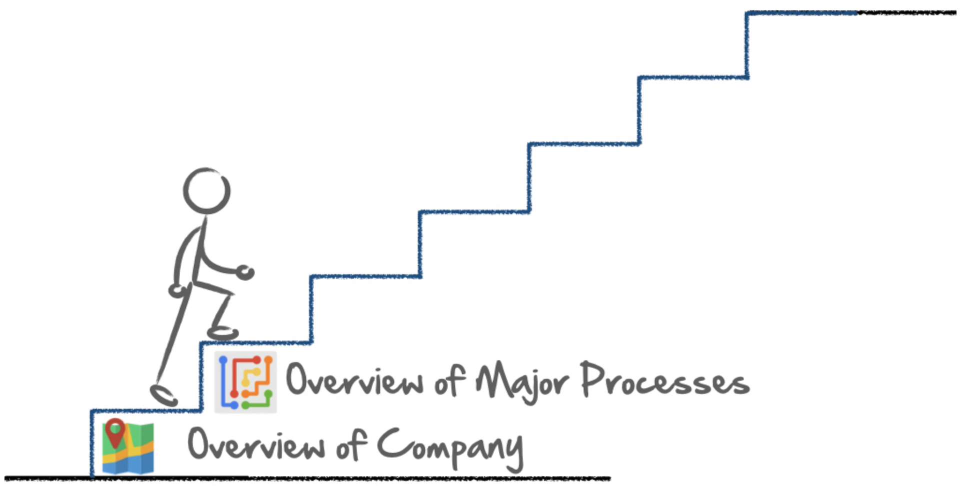
Confidence comes through understanding.

Step 2: Overview of Major Processes

Step 2 – Overview of Major Processes

Now that employees have an overview of what the company does, you are going to peel back another layer and present the major processes involved.

The purpose is to help employees realize that at a high level, everything is pretty simple.



Tip! Skip the Visio charts and process maps. Instead, use images to explain a process.

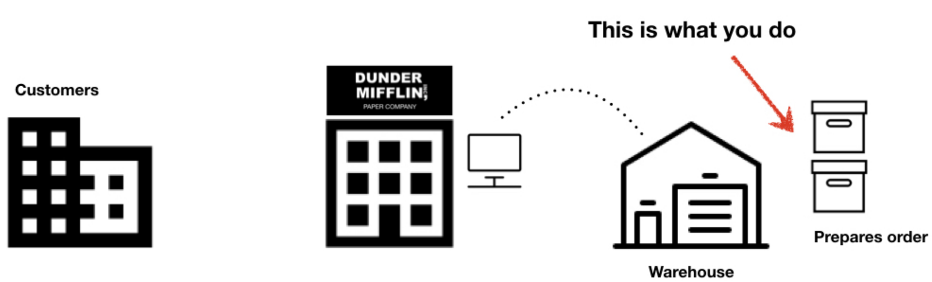
Give a high-level explanation of what goes on in the company. Then, zero in on the processes related to your new employees. Don't go too deep here – just enough to make new employees confident that they understand where it is they fit into the big picture.

Example of Major Processes

Going back to Dunder Mifflin, here are the major processes...

"When customers notice their paper is running low, they call our main office and our main office takes the order."

"That main order is sent to our warehouse who prepares the order for delivery. This is what you, our new employee will be doing!"



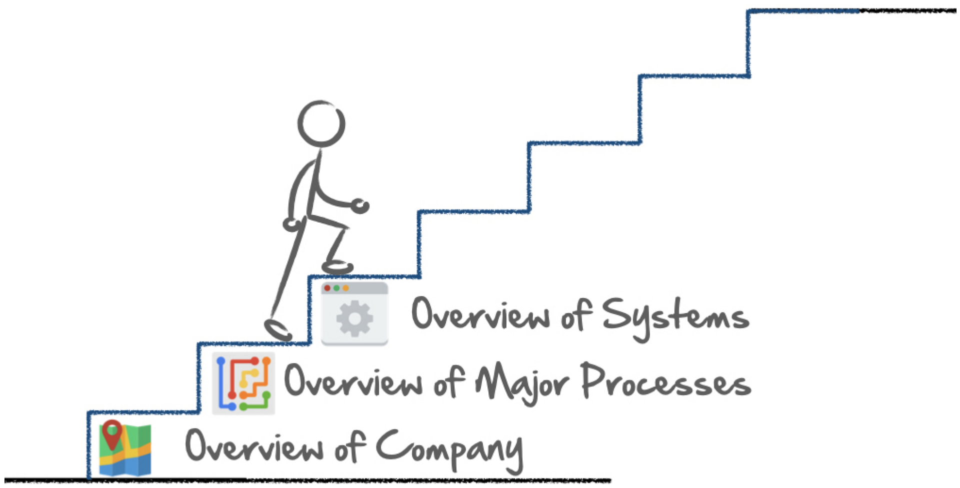
Tip! Don't get into the weeds here. This stage is all about building confidence and communicating the basics of what goes on. We'll get to the details later.

Step 3: Overview of Systems

Step 3 – Overview of Systems

This step is a bridge between high level processes and detailed procedures they need to follow.

The purpose is to highlight the main systems you use (e.g. Salesforce, Dynamics, SAP, PeopleSoft, etc.) so that later on when you jump into how to perform a task, the terms are familiar.



Tip! Match processes to systems. Example, "You will keep track of customer questions in a system called Zendesk." Or, "You will manage the orders in a system called Salesforce.com"

Again, the emphasis is on building confidence. If you drop the name Salesforce, Zendesk, or PeopleSoft right now, then when you mention it again in the near future employees will say, “Oh yeah! You mentioned that earlier. I remember that.”

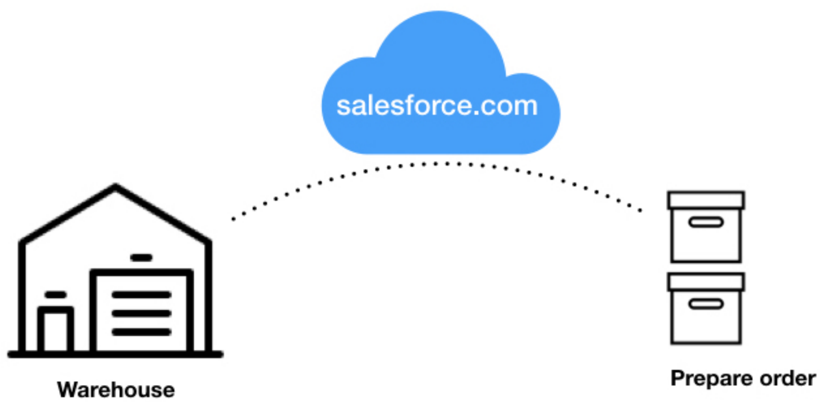
You are planting a seed that will build confidence.

Example of Explaining Systems

Going back to Dunder Mifflin, here is what I would include in a slide or a video...

"To prepare orders, you use a system called Salesforce.com."

DUNDER MIFFLIN, INC.
PAPER COMPANY



Your business probably uses dozens (if not hundreds) of systems, software, web applications, etc. For new employees, that list is incredibly intimidating, so just bring up the few they will be using.

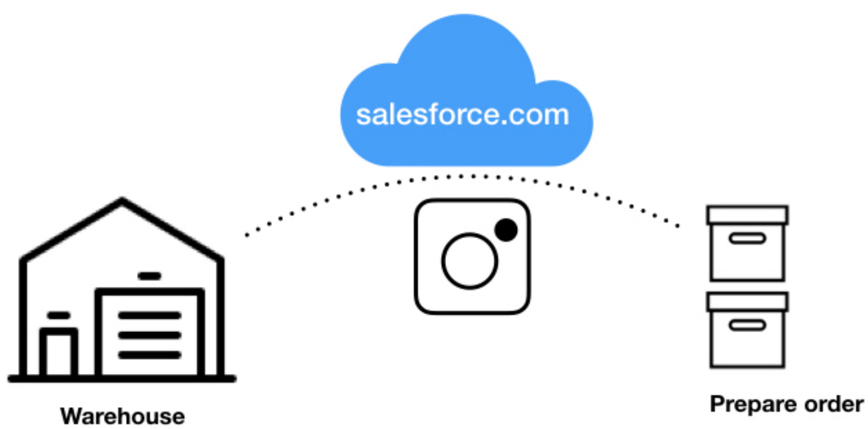
Then, use this simple phrase: [System A] **is kind of like** [thing they are familiar with].

For example, does your new employee use Instagram? Perfect.

"Salesforce **is kind of like** Instagram. In Instagram, when people post something that's interesting, you get an alert that prompts you to do something. You then go into Instagram to reply, like, or accept a request. Salesforce does something similar.

"When new orders come in, you get an alert that prompts you to do something. You then go into Salesforce to create, schedule, or update an order."

DUNDER MIFFLIN INC.
PAPER COMPANY



Is that a perfect analogy? Maybe not. But it does the job of helping employees make the new seem somewhat familiar. They already use systems just like the ones you use. This builds confidence that they can learn something new because it's actually not that new.

Tip! Make the new seem familiar to build confidence.

Use ScreenSteps courses to give all new employees a consistent experience no matter when they join your team.

Don't Stop Yet!

There are still more steps

Don't stop yet!

If a company has any kind of transition plan in place, then this is typically where it stops. And that's why it takes six months to a year to become productive. There is still a HUGE gap that needs to be traversed.

Tip! Most company's stop here because they don't actually know what comes next. If that's you, the ScreenSteps Transition Team can help!

New employees are incredibly frustrated when transition plans stop short. When they sit down at their desks, they don't actually know how to do anything.

And that's why YOU are not going to stop here.

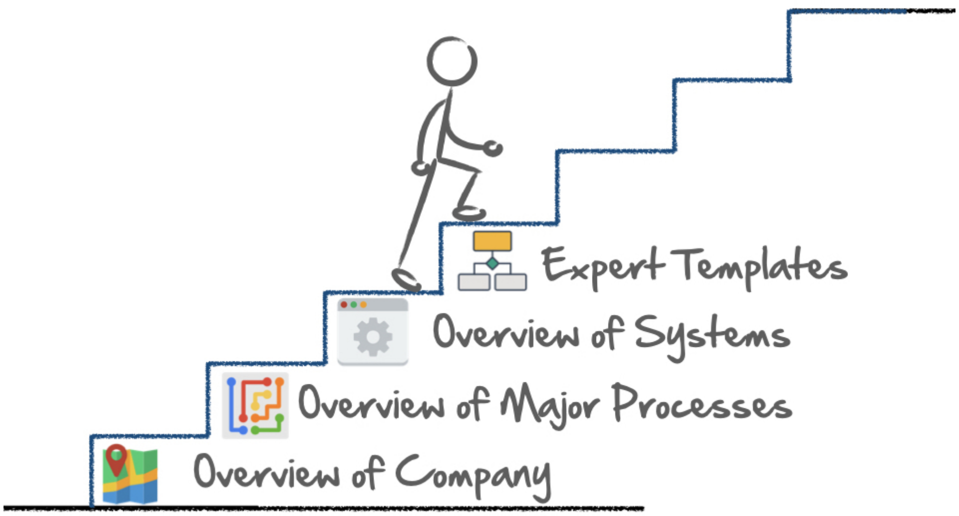
Will it be a little more work? Yes. It will be. But these next few steps are an investment that pays out big time. Not only will it change your new hire's life, but it will change how your company grows and develops its people.

Step 4: Expert Templates

Step 4 – Expert Templates

The other day, I looked up a recipe for grilling chicken. That night, my family enjoyed a delicious meal as though it had been made by a professional cook.

That's the power of **Expert Templates**. They allow other, less expert people to get really great results without being experts themselves.



Tip! As long as you get one expert to create a template for doing what they do, others can get expert-like results without being experts themselves.

For grilling chicken, I don't need to be an expert at mixing flavors or preparing the chicken – **I just need one expert to write down their expertise** on mixing flavors and preparing chicken. If I can follow what's been written down, then I can act like an expert and get very similar results.

The same goes for creating a website. Expert web designers have built templates that non-experts can follow to get really great results (think of Squarespace, Weebly, or CilckFunnels).

The Key to Fast Onboarding

> *The reason we can train new employees so quickly is because we have expert templates. Right away, new hires can perform tasks just like our best call agents would.*
>
> Stephanie

In the training world, we try our best to extract knowledge out of people. We say, “I don’t want anybody leaving this company with all of that knowledge in their heads.”

So we come up with Knowledge Management projects and we try to get experts to write down, in a Word doc or in a Wiki, their knowledge.

But is their knowledge really what we want? Is a bunch of documentation with words or video recordings of them explaining concepts really what we want

No. It’s not.

Tip! It’s not just an expert’s knowledge (facts) that you want to capture, it’s their mental models (what they do with those facts) that you want to capture.

We don't value experts because they have a lot of knowledge – we value them because they know how to use that knowledge. They know that in certain situations, approach X is the best approach. And in other situations, approach Y is the best approach.

They know

- what questions to ask,
- what conditions are important, and
- where to look for answers

The Expert Thought Process

If Lisa stops by Tom's desk to help answer a customer's question, and Lisa makes a suggestion to Tom, what Tom doesn't see is the dozen mental processes Lisa went through in her head to arrive at that answer.

To Tom, Lisa just looked at the customer's account and had a response. But Lisa...

- knew that the customer had a legacy account.
- Because of that, certain settings were missing.
- Because those settings were missing, that caused this particular problem.
- To resolve that problem, she would have to do X.

That is exactly what Tom needs to learn if he is going to be a super productive employee.

Tip! If you can record how an expert thinks through problems, procedures, or customer interactions **AND format it in such a way that others can use that same mental model**, then you can create more experts.

Duplicate Your Expert's Results

What if you had one expert in Accounting and you could record her mental models?

Capture what she **knows** and how she thinks through problems and situations, **AND** you could format it in a way where others could go through the same model?

You could bring on new accountants and get expert results from rookies right away!

Then duplicate that for your expert in Sales, expert in Customer Service, and expert in HR.

You Just Need One Expert

What if you could use an expert HVAC repairman's mental model for figuring out why your AC is broken?

You would know what questions to ask, what tests to run, what systems to check, **and you could confidently do the work yourself**.

If you could capture the mental models of your expert customer support agent, accountant, sales rep, programmer, or whoever, and effectively relay that to your workforce, **you could get an entire workforce to think in an expert way and deliver expert results**.

Tip! If you can capture your experts' mental models in a way that can be used by others, you just need to get one expert to capture it perfectly one time. And then it can be used forever.

The Secret to Fast Onboarding

This is exactly what Stephanie did when she was put in charge of transitioning 40+ new hires to fill the role of call agents who could answer any call that came through. **She captured the mental models of her call center experts in a way that allowed new hires to instantly use them**.

When a customer asked a question, or a procedure needed to be completed, or a problem arose – new employees were able to approach the situation in the exact same way that her top experts would.

Right off the bat!

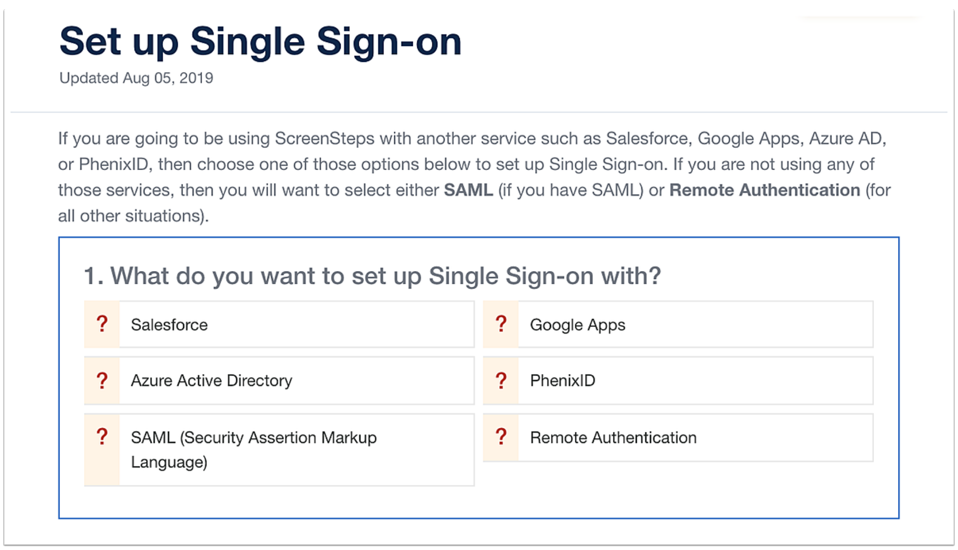
Example of an Expert Template

We'll leave the world of Dunder Mifflin to talk about a real-life expert template that we use with our customers at ScreenSteps.

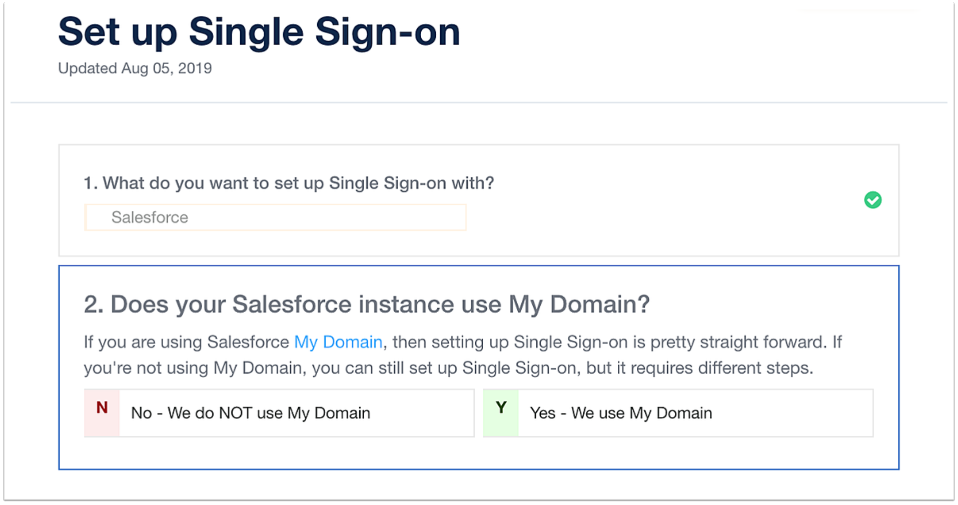
Our support team needs to help thousands of customers who often have questions. Sometimes those quesitons have a simple answer, and sometimes those questions have a complex answer.

An example of a complex answer is **Setting up Single Sign-on**. Below is a screenshot of our expert template that walks somebody through the steps.

First, an expert would determine what system the customer is using for setting up Single Sign-on.



If you click on any of those options, you are taken to the next question an expert would ask. If somebody chose **Salesforce**, then they would be presented with the following screen.

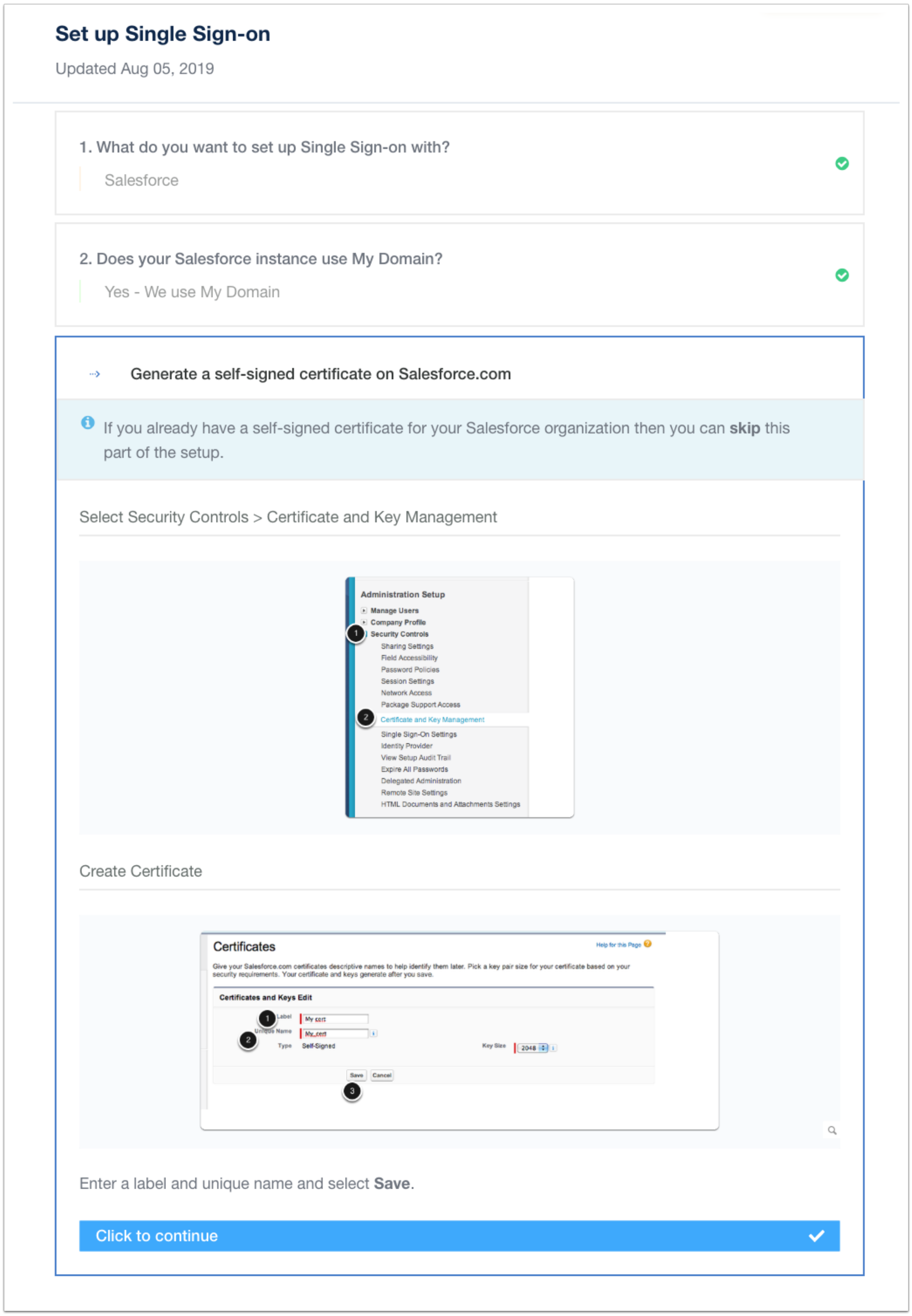


The format allows for a new employee to immediately begin applying expert questions and actions to address any situation.

Not Just Decisions

On top of knowing what questions to ask, experts also know what **to do**. So expert templates don't just stop at decision trees – expert templates also include the steps an employee would take to perform tasks.

If somebody chose, "Yes – We use My Domain" then they would be presented with the next set of instructions…



Those are the exact steps an expert would take to "Generate a self-signed certificate on Salesforce.com" and there's no ambiguity on how to do it.

New employees can immediately begin using these templates to perform their day-to-day jobs.

Tip! Expert templates must include the **necessary questions** and the **necessary actions** for performing a task. If you're vague, employees will end up calling you for clarification.

Anybody Can Be an Expert

That expert template is so easy to follow that we actually send it to our customers who need to set up Single Sign-on. They can go through the exact same steps as our internal expert *without* having the expert on the phone.

Develop New Experts

You might be thinking, "**I don't want my employees to be robots. I want them to think and use their own brains to solve problems and add value.**"

I get it. You're worried that expert templates will dehumanize your workforce.

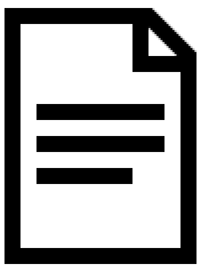
But here's the thing, as your workforce goes through the mental models and as they parse through information in the same way your experts would, **and then do it again and again**, they will *learn* how to think like an expert and their brains will be able to make new connections and further improvements to whatever process they are performing.

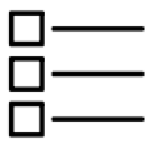
Tip! Not only does capturing an expert's mental model decrease the time it takes for employees to be productive, but it also ***cuts the time it takes employees to learn*** **because they get a shortcut to see what the smartest person at your company would do in the exact same situation**.

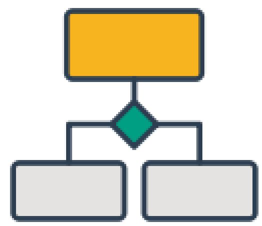
Capturing Mental Models is Key

This concept of capturing mental models and building expert templates is critical for training employees on day-to-day operations.

Some of your Expert Templates will be simple FAQs. Some will look like checklists. And some will function like decision trees that account for different variables.







Tip! You can use ScreenSteps to create all of your Expert Templates and guarantee a smoother transition for new employees.

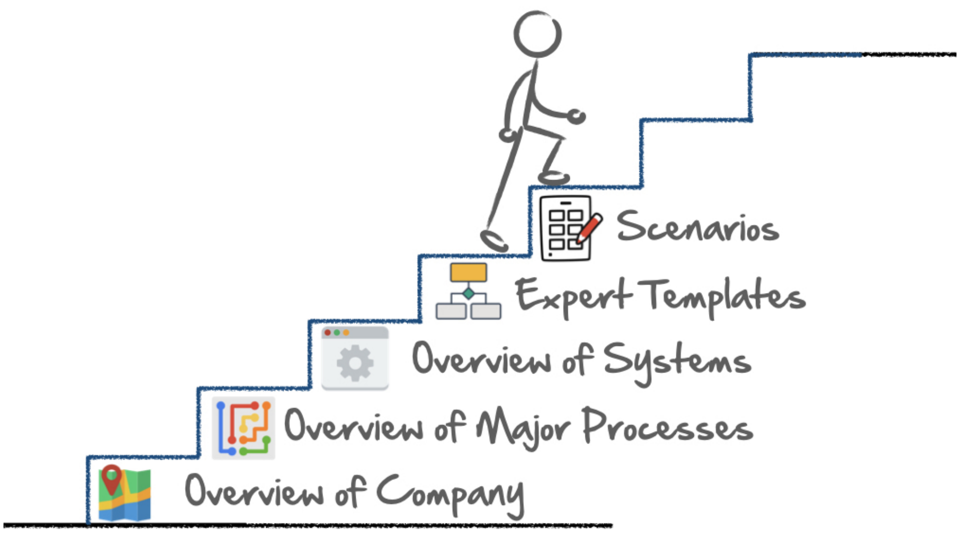
Step 5: Scenario-Based Training

Step 5 – Scenario-based Training

A few companies we've worked with made it all the way to this point in their transition plan:

1. Overview
2. Major processes
3. Systems used
4. Expert templates

But they still didn't experience the amazing results **as fast** as Stephanie, Vic, Gretchen and others have experienced because **their plan didn't include scenario-based exercises.**



Tip! Create experiences that allow employees to use the expert templates. That way, when they sit at their desk, everything feels familiar.

Cathy Moore, a training design expert, is big on this training approach. She emphasizes that for the corporate training world, don't ask yourself, "What do employees need to know?" Instead, ask yourself, "**What do employees need to do?**"

Then create experiences that teach employees what to do and how to do it.

What Kind of Experiences?

For new employees, those experiences are **real-life situations** they will face when they sit down at their desk.

Most companies we work with deliver these scenarios in a classroom setting. The instructors (i.e. managers or team leads) describe a scenario or flip to a PowerPoint slide that includes some information with a prompt. The new employees are then asked to locate the Expert Template that will help them respond to the scenario and go through the Expert Template to work through all of the steps.

For Example...

If you are teaching employees how to process a payment that just came in, you could walk through a scenario just like this...

"You received a check for $8k. Find out how you would process that check."

New employees would search the knowledge base to find the appropriate article.

I'm not training agents to memorize anything.

I'm anti-memorization.

The goal is for new agents to be able to find the answers and use them well. That's what I'm training them to do.

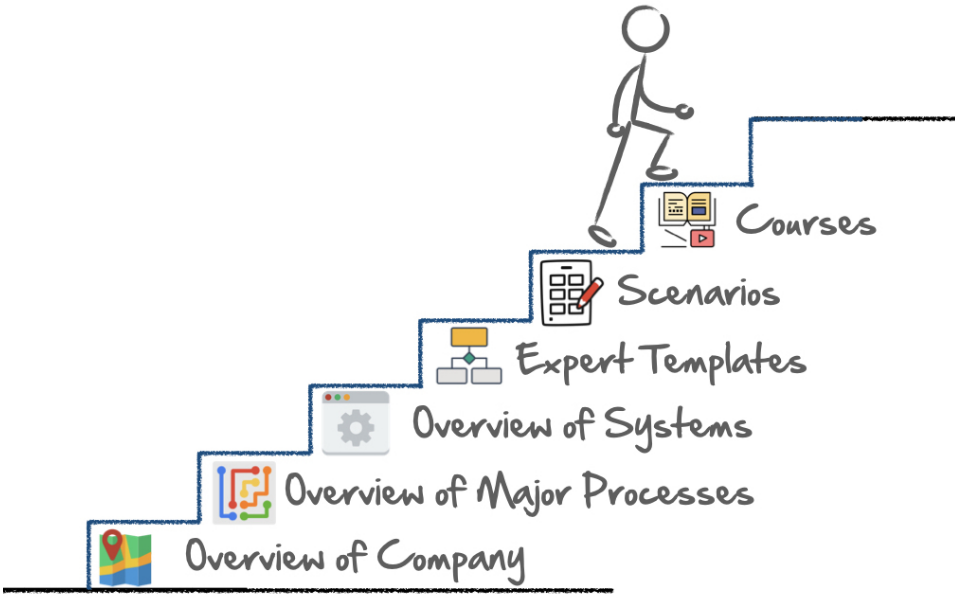
Stephanie

Step 6: Follow-up Courses

Step 6 – Follow-up Courses

At this point, your employees can get expert-like results because they are following your templates. And going through your expert templates again and again will go a long ways in teaching your employees.

But to eventually *be* experts (or at least get as close as possible to expert status) for their particular jobs, you will want to provide follow-up courses.



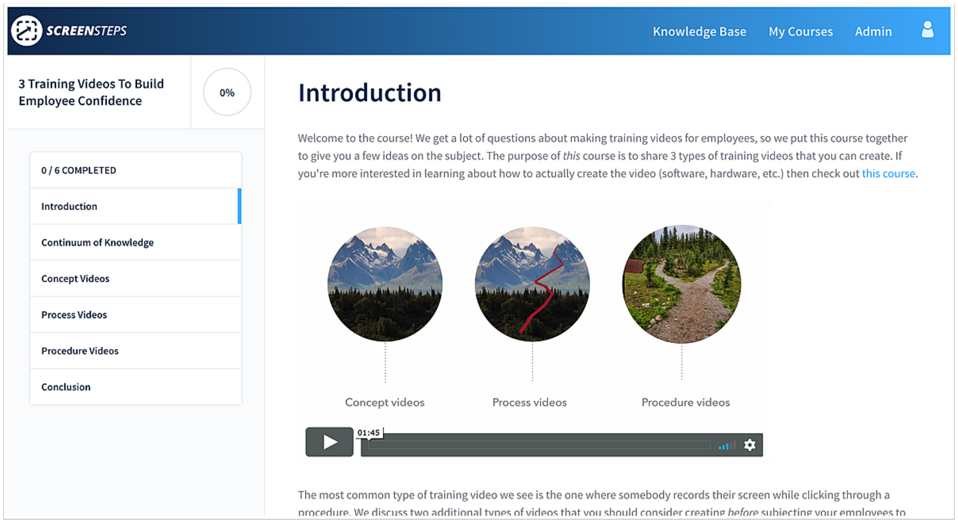
Tip! Courses provide an opportunity for you to teach employees how all the dots connect.

After the first two weeks of being on the job, you can do lunch-and-learns to give your new employees an opportunity to ask questions or review processes and procedures.

If you know the kinds of questions that come up, you can create courses in ScreenSteps to automate the process and give all employees a consistent experience.

Example Course

Below is an example of a ScreenSteps course. You can embed videos, questionnaires, or create practice scenarios using ScreenSteps workflow articles.



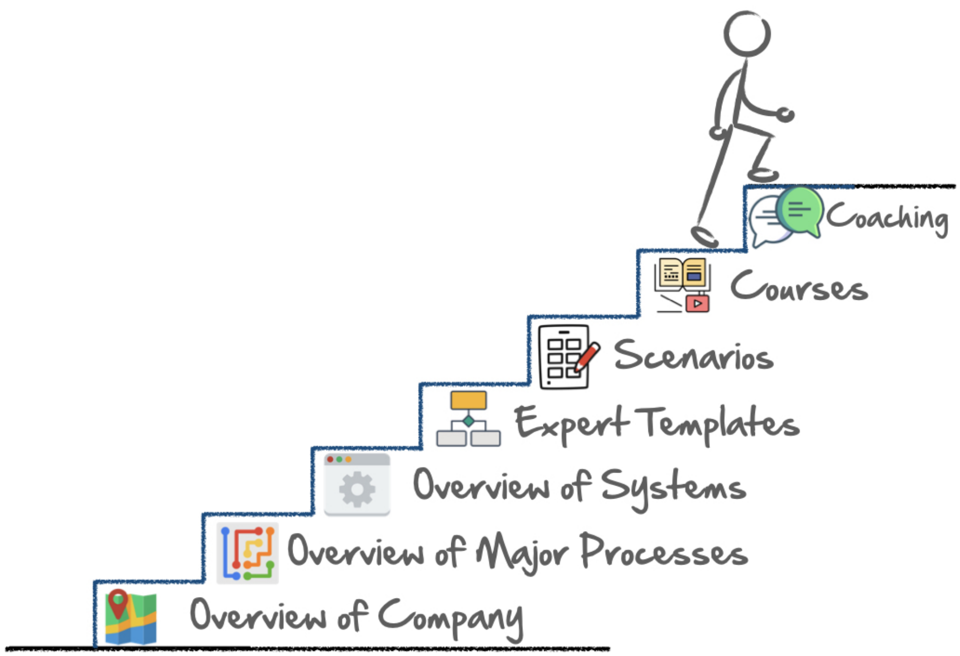
Tip! Courses make it easier to automate your transition plan and give everyone a consistent experience.

Step 7: Coaching

Step 7 – Coaching

This is a one-on-one interaction that allows you and your new employees a time to reflect on what they can do to make improvements.

That's when the real learning occurs.



If you are transitioning new hires into customer support agents, you could discuss some difficult customer interactions they've had to deal with as well as the positive experiences they've had.

If you are transitioning new sales reps, you can discuss what they find difficult and what they enjoy doing.

These interactions are less about you teaching new employees and more about you giving your employees a space to hear themselves talk through questions, challenges, and successes. It's amazing how much growth can occur when people are given a chance to talk through what they're experiencing.

A Simple Coaching Approach

In Michael Bungay Stanier's book, *The Coaching Habit: Say Less, Ask More & Change the Way You Lead Forever*, he mentions seven questions you should ask in a coaching situation:

1. What's on your mind?
2. And what else?
3. What's the real challenge here for you?
4. What do you want?
5. How can I help?
6. If you say yes to this, what are you saying no to?
7. What was most useful to you?

If you want to learn more about that approach, I recommend checking out the book and reading it over a weekend.

Tip! Coaching is more about giving your employees a time to reflect. Avoid dropping wisdom bombs and giving advice. Just ask questions and let your employees talk things through.

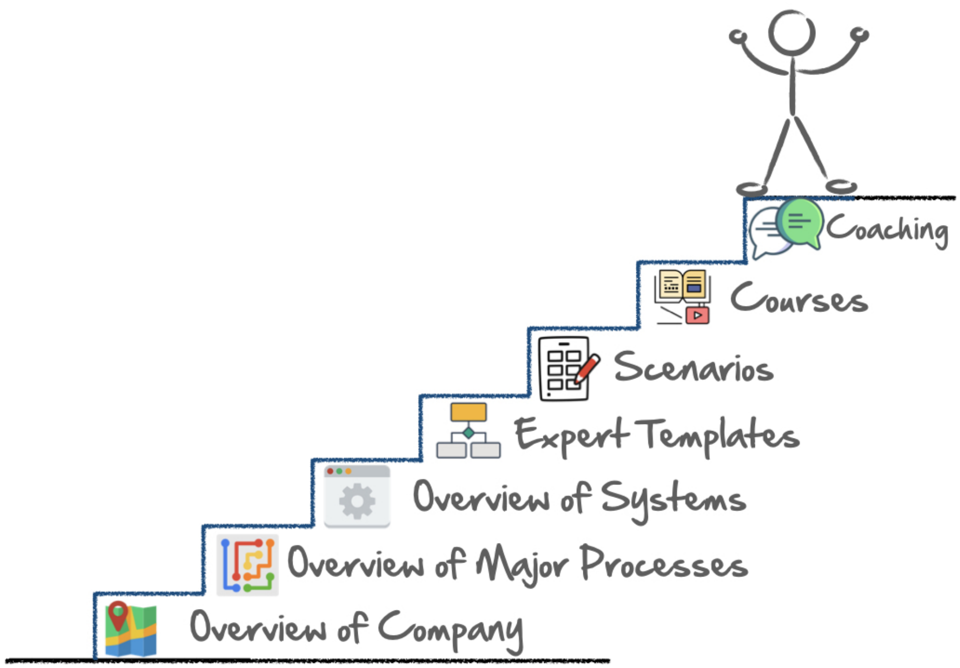
However you decide to approach coaching, the common theme to all coaching is this – **don't be quick to jump in with advice**. Give your employees a space to work through their challenges and come to their own solution, if possible.

You Made it!

You Cleared the Gap!

Or rather, your employee successfully cleared the gap!

You created a step-by-step transition plan that will help your new employees cross the gap without stumbling or coming up short.



On the next page, I show about how long each of these steps should take you to get through.

Example Schedule

Day 1

- [ ] Overview of Company
- [ ] Overview of Major Processes
- [ ] Overview of Systems

Day 2 (repeat until comfortable)

- [ ] 10 Easy Scenarios
- [ ] Break
- [ ] 5 Medium Scenarios
- [ ] Lunch
- [ ] 2 Medium Scenarios
- [ ] 3 Difficult Scenarios
- [ ] Break
- [ ] 2 Difficult Scenarios
- [ ] 2 Medium Scenarios

Begin One Week After Starting

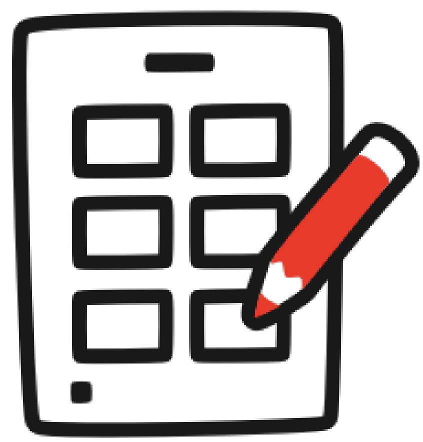
- [ ] Coaching Meeting
- [ ] Send Follow-up Course(s)

What if You Have Limited Resources?

If you have limited resources and cannot do ALL seven steps, which ones should you include?

Easy...

1. Expert Templates
2. Scenario-based Training



These two are non-negotiable. When new hires come on, you MUST give them resources to be able to do their day-to-day job. If you skip these, but do all the other steps, then you will NOT have a smooth transition.

If you ONLY do these two, and skimp on the overviews and follow-up activities, you will still get productive employees who are able to get expert-like results.

The transition may not go as smooth as it could, but your employees will be happier because they will actually know how to do their jobs.

Bottom Line!

DO NOT SKIP building your expert templates and showing employees how to use them.

SCREENSTEPS

Use ScreenSteps

You can build out all of the resources you read about using ScreenSteps.

- Courses that give an overview of your company
- Courses that give an overview of your processes
- Courses that give an overview of your systems
- Expert Templates
- Scenario-based training (if you decide to not do classroom training)
- Follow-up courses