



**NICE** · CXone

**Using the same  
call center software  
and expecting  
different results?**

**Stop the insanity.**

Modernize your contact center.

# About the Workshop

NICE CXone provides these workshop materials for you to use in training your staff. They are designed to last approximately 60-90 minutes making them ideal for conducting over lunch or as a short refresher where needed.

The workshop can be delivered either in person or virtually. Activities sometimes have to be slightly modified depending on the delivery mode, but instructions are in the speaker's notes.

The **ideal number of participants** for a workshop is 12-18 people. This allows for interactions without it becoming too unwieldy. A smaller group limits the participant interactions and puts pressure on a smaller number of people. A larger group may limit the amount of participant interaction simply because of space, time, noise, and other factors.

A **Participant Workbook** is provided. Print these out (black and white printing is fine) or email them to participants to print themselves. This serves as a record that participants can customize and keep as a reminder of the content for later reference. Encourage people to mark it up and truly make it their own. Note that in the upper right corner of each slide is the corresponding PW number so participants can easily re-orient themselves when necessary.

Activity should begin as soon as participants enter the training room (in person or virtually). This tells people that the workshop is participatory and starts to get them engaged immediately. The first slide (slide 5 in this file) gives instructions for what they should do once they get settled. Be sure to prepare flip charts, chat pods, open answer poll questions, or whiteboards ahead of time. And be sure to circulate and

talk to people, learning who they are and personally welcoming them as they complete this pre-workshop activity.

**Introductions:** Because this is a short workshop, no time was allotted for each participant to introduce themselves to everyone else. Introductions can easily take 20 minutes, and that's one-third of the time allotted for the entire workshop. Instead, use the pre-workshop activity time to circulate, learn who people are, and introduce them to people sitting nearby. Virtually, participants can introduce themselves in chat as part of the pre-workshop activity.

## PRINTING THE LEADER'S GUIDE

The Leader's Guide is the Notes view of this PowerPoint file. The first 4 pages are instructions for the trainer and are hidden from presentation. You can print these pages in slide view to make them easier to read. For the rest of the PowerPoint file, print the Notes pages so that you will have a thumbnail of the slide with speakers notes beneath.

## AUDIENCE

This workshop is appropriate for a staff committee who are looking to redesign the onboarding process or managers who are taking more responsibility for onboarding.

# Preparing to Lead the Workshop

The **key factors for success** in the workshop are how comfortable you are with the material and inserting personal stories to help illustrate the content. To get comfortable with the material, plan to start preparing at least one week ahead of time.

- Read through the speaker's notes a number of times over the first couple of days.
- Make notes of stories you could add and points you want to emphasize.
- Do NOT plan to read the speaker's notes word-for-word. The notes provide background information for the trainer to make sure you are comfortable with all of the content.
- You also do not have to cover every bullet on every slide, and participants certainly don't need you to read them off the slide to them. For each tip, you can say here are some things you can do to support this tip, and then just highlight 2-3 of them. Or you can ask participants to look down the list and choose 1-2 they want to discuss. All of the points are in the Participant Workbook, so everyone has a record of them for reference.
- After you have read through all of the notes several times and made your own notations, practice with your own words, adding your stories. Do this at least once a day for several days ahead of time until you can deliver the entire workshop smoothly and confidently.

## THE DAY OF THE WORKSHOP

If delivering in person:

- Make sure that the room is setup. If people are going to bring food and drinks, make sure they have enough space for those items. And it can be a good idea to have extra paper towels or napkins available.
- Set up two flip chart pages with the two questions and place them in different places in the room with markers nearby.
- Print out copies of the Participant Workbook and have one at each place.
- Have tent cards at each place for people to write their names upon and display in front of them.
- Make sure you are in the room and ready at least 15 minutes before the workshop is scheduled to begin.

If delivering virtually:

- Make sure you are comfortable with the platform you are going to be using. You should have practiced the workshop on the platform several times ahead of the workshop.
- Email all the participants a copy of the Participant Workbook and encourage them to print them out to use during the workshop.
- Have the pre-activity set up as two open-ended poll questions, a divided whiteboard, or two chat pods (with maybe a third chat pod for introductions).
- Be present in the virtual room at least 15 minutes before the workshop is scheduled to begin.
- As people enter the room, welcome them and start interacting with them.

# During the Workshop

- **Relax and enjoy the experience.** You've done your preparation, you know the content, so now it is time to enjoy the final product – the delivery of the workshop.
- **Be aware of your time.** Because you want to encourage participation, questions, and discussion, watch out for “rabbit holes” that become a whole workshop in themselves. If time runs short, you might have to curtail participant interaction, but you definitely want to leave enough time for them to complete an action plan before they leave.
- **Encourage participation.** Virtually, let participants turn on their microphones and talk from time to time. Both in person and virtually, ask what participant think or if they would add anything to the tips. Many will already have experience with the topic and will have good points to contribute. Additionally, dealing with participants' questions as you go along helps to customize each workshop to the people who are present.
- **Tell stories.** Stories help make points clearer and help increase engagement. You want to tell personal stories that are short and to the point. A five-minute story has to be really gripping to keep people's attention, but a short 30 second story can help clarify the content and keep people engaged.
- **“Nudge Your Neighbor” activities:** Keep these to just 30-60 seconds and then move on. People don't have to share with everyone the things they share with just one or two other people during these activities. These activities get the participants to pause and reflect and decide what they might do with the information.

## AFTER THE WORKSHOP

Take the time to reflect on your delivery – what went well and what could be improved. Write down a few notes for your future reference.

If you administered an end-of-training workshop, read through people's responses to aid your reflection and improvement.

Congratulate yourself on leading a successful workshop.

Which workshop will you deliver next? NICE CXone has a number of 1 hour training workshops. Browse our catalog and choose your next topic.

# Workshop Overview

Topic	Activity	Time Allotted	Materials
Introduction and Overview	Presentation	3 min	PPT 6-7; PW 3
	Self-rating	4 min	PPT 8; PW 3
	Presentation	2 min	PPT 9; PW 4
Making Onboarding Effective... and FUN	Poll Questions	3 min	PPT 10-11
	Presentation	3 min	PPT 12-13; PW 4-5
	Nudge Your Neighbor	1 min	PPT 14
	Presentation	4 min	PPT 15-16; PW 6
	Small Group Activity	6 min	PPT 17; PW 6
	Presentation	5 min	PPT 18-20; PW 7
	Nudge Your Neighbor	1 min	PPT 21
Using a Buddy Program	Presentation	6 min	PPT 22-26; PW 8-9
	Nudge Your Neighbor	1 min	PPT 27
	Presentation	6 min	PPT 28-29; PW 9-10
	Nudge Your Neighbor	1 min	PPT 30
	Presentation	1 min	PPT 31; PW 10
Remote Onboarding	Discussion	3 min	PPT 32-33; PW 11
	Presentation	7 min	PPT 34-36; PW 11-12
	Nudge Your Neighbor	1 min	PPT 37
	Presentation	8 min	PPT 38-40; PW 12-13
	Nudge Your Neighbor	1 min	PPT 41
Close	Review	4 min	PPT 42-43
	Action Plans	5 min	PPT 44; PW 14
	Closing Comments	1 min	PPT 45

# Welcome!

Once you get settled, answer these questions:

How long is your onboarding program?

Do you have a buddy program for onboarding?

What is the best thing you've seen in onboarding a new employee?



# **Onboarding New Employees**

A Workshop

# Workshop Overview

The **goal** of this workshop is to develop some ideas for making onboarding new employees more effective so that they more quickly and thoroughly integrate into their role and the company.

- Introduction and overview
- Making Onboarding Effective... and FUN
- Using a Buddy Program
- Remote Onboarding
- Close

# Goals of Onboarding

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Onboarding should help a new employee...

- Feel welcomed
- Get to know the people with whom they will be working
- Get the tools they need to be successful
- Integrate into the company's social and operational functions
- Reduce the time needed to reach competency
- Connect to the organization's purpose
- Feel appreciated
- Emotionally connect to the company

# Why Onboarding is Important

**33%** of new hires look for a new job within 6 months

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**23%** of new hires leave before their first anniversary

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**100-300%** of the replaced employee's salary is organizational costs of employee turnover

Source: Ferrazi Greenlight

**20%** of turnover happens in the first 45 days

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After a great onboarding experience, employees are **69%** more likely to stay with a company 3 or more years

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New hires with longer onboarding programs report **proficiency 4 months sooner** than those with shorter programs

Source: O.C. Tanner

Companies with strong onboarding:

**82%** improvement in employee retention

**70%** improvement in productivity

Source: Glassdoor

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**80%** of first week new hire activity dedicated to form completion and administrative tasks

Source: Learning Rebels

# Making Onboarding Effective... and FUN

# Two Questions

## When should onboarding begin?

- A. As soon as the person signs their offer letter
- B. One week before the person's first day
- C. On the person's first day
- D. At some other time

## How long should onboarding last?

- A. The first week of employment
- B. The first month of employment
- C. The first 90 days
- D. The first 120 days
- E. A full year
- F. Some other timeframe

# Stages of Onboarding

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- Before the first day
- The first week
- The first 90 days
- The rest of the first year
- At their 1-year anniversary



# Before the First Day

- Stay in touch
- Have interviewers send new hires a special note of congratulations
- Send out helpful information
- Create an agenda for the employee's first week
- Create a 30-60-90 Day plan
- Set up a comfortable workstation with needed software installed
- Add the employee to email distribution lists and folders
- A day or two before, announce their arrival
- Provide a welcome gift

# Nudge Your Neighbor

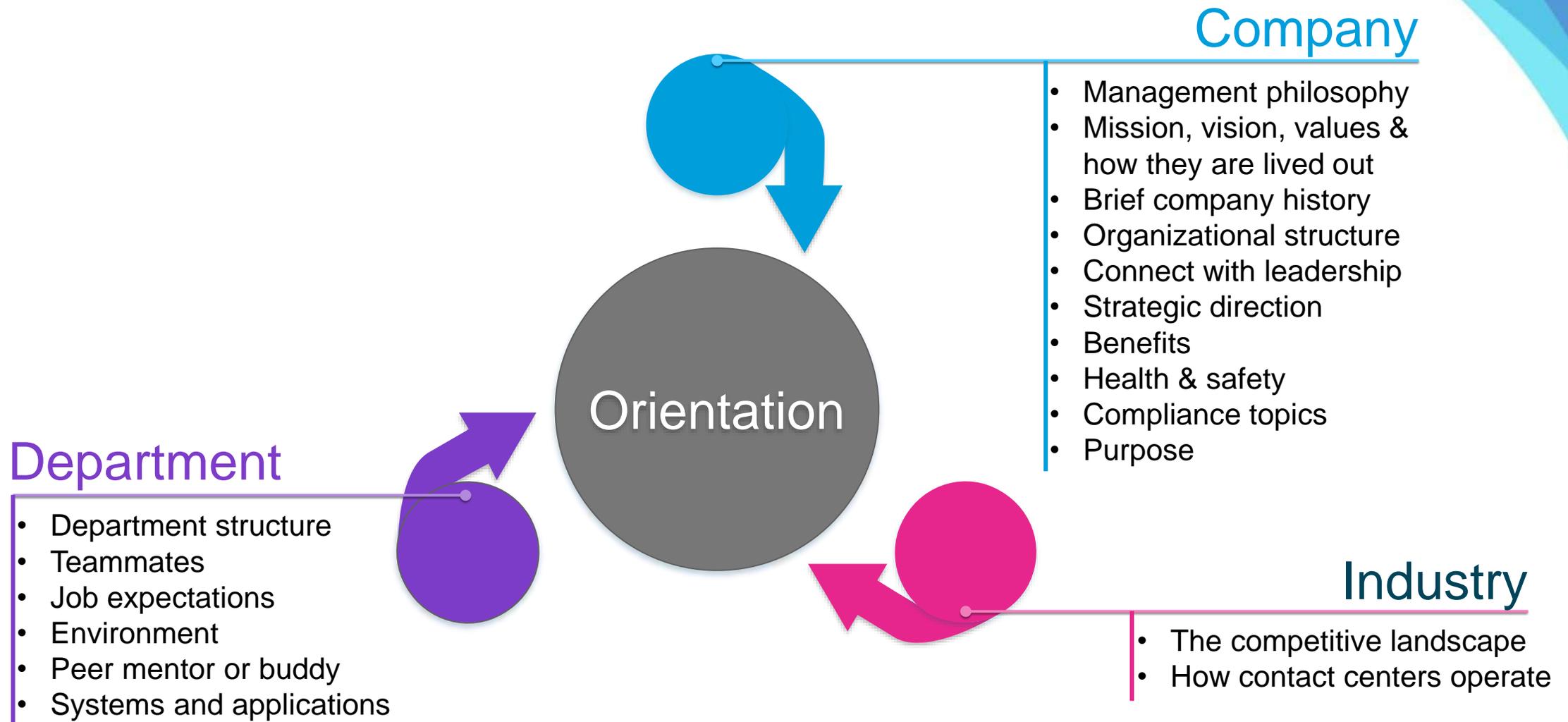
What is one thing you are not already doing that you could do to make your preparations for onboarding more effective?



# The First Week

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- Make them feel welcome
- Help them get the lay of the land
- Introduce them to people
- Block off time for HR orientation
- Meet their supervisor
- Take them to lunch
- Cover important work processes
- Communicate purpose





# Make It More Engaging

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With some others in the workshop, come up with at least three ideas for making the first week more engaging than simply reading policies and procedures (or worse, having them read to you), signing documents, and listening to others drone on. While much of the information is necessary, what are some ways it could be more engaging for new hires?

Be prepared to share your best idea.

# The First 90 Days

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- Invest in training
- Allow for job-shadowing
- Build in opportunities for feedback
- Conduct a formal performance review
- Give recognition for their unique contributions
- Plan for the next 90 days



# The Rest of the First Year

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- Set new goals each 90 days
- Weekly one-on-ones with their direct manager
- Continue job shadowing and training as appropriate
- Call out accomplishments and recognize contributions

# At Their One Year Anniversary

When the 1<sup>st</sup> anniversary is celebrated, employees were:

- **55%** more likely to recommend the organization as a place to work
- **42%** more likely to be proud of their organization
- **33%** more likely to be highly motivated to contribute
- **29%** more likely to support the organization's values
- **24%** more likely to put a great deal of effort beyond what is required to help their organization succeed

Source: O.C. Tanner

- CELEBRATE!!!!
- Give a gift or symbolic award



# Nudge Your Neighbor

What is one benefit that you see in celebrating an employee reaching their first anniversary?



# Using a Buddy Program

# What is a Buddy?

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Someone who is not the new hire's manager and who partners with a new employee during onboarding to help them integrate more smoothly into the organization and their job duties.



# Benefits of a Buddy Program

## For the New Hire

- Clear point-of-contact and one-one-one assistance
- Increased socialization
- Knowledge of “how things really get done”

## For the Buddy

- Expanded network
- Opportunity to enhance teaching, mentoring, and management skills
- A fresh perspective

## For the Organization

- Increased employee motivation and retention
- Enhanced employee development
- Increased employee productivity

A close-up photograph of two hands fist-bumping, symbolizing teamwork and support. The hands are positioned in the center of the frame, with the left hand slightly higher than the right. The background is blurred, showing what appears to be an office setting with people and equipment.

## Goals for the Buddy Program

- Offer advice and guidance
- Increase role clarity
- Convey the mission of the company
- Provide inclusion into other teams
- Provide a clear point-of-contact for answers
- Troubleshoot issues with systems and hardware
- Advocate for induction into the company culture

# Structuring the Buddy Program

- Determine how long the buddy program lasts
- Determine what makes a good buddy
- Select and train people to be buddies
- Assign the buddy to a new hire
- Three distinct stages:
  - ❑ **Pre-Start:** Welcome email and introductions
  - ❑ **Orientation:** Guidance and support during initial couple of weeks
  - ❑ **Momentum:** Support of the new hire's key learning outcomes

# Nudge Your Neighbor

What are some qualities in a person that would make them a good buddy for a new hire during onboarding?



# Buddy Selection

## Selection Criteria

- Has a desire to help new hires
- Is patient
- Has strong communication and interpersonal skills
- Has been with the organization for at least 1 year
- Models the values and culture of the organization
- Readily accessible to answer questions
- At a similar level or peer group as the new hire

## Selection Process

- Create an online channel or other online process for people to express interest in the program
- Post news about incoming hires
- Share the criteria and ask for volunteers
- Randomly select from the group of volunteers
- Provide a short training on responsibilities and tips

# Buddy Responsibilities

## Pre-Start

- Send a welcome email
- Be sure the new hire received their welcome packet
- Set up a time for a call before the first day to answer any questions

## Orientation

- Welcome the new hire and introduce them to others
- Do a 1-hour meeting on “Company culture 101”
- Take the new hire to lunch
- Give an overview of communication tools

## Momentum

- Support the new hire’s social integration
- Discuss professional balance with the new hire
- Have open conversations about professional development

# Nudge Your Neighbor

What is one thing you wish someone had told you when you were a new hire?



# Tips for Buddies

- Focus your attention on the new hire
- Be patient
- Be positive
- Be flexible
- Don't get in the way of the new hire's relationship with their direct manager



# Remote Onboarding



# Discussion

How is remote onboarding different than in-person onboarding?

# Potential Failure Points

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- Equipment does not arrive on time
- No plan for Day 1 / Week 1 / onboarding
- Zoom fatigue caused by sitting in a meeting for 5 hours or back-to-back meetings
- No account setup (such as email or other access not working)
- The direct manager is not available for training or for a meet and greet
- No one announced the new hire's arrival
- The welcome kit is delayed or doesn't arrive

# Before the First Day

- Warmly welcome them and set expectations
- Prepare a training plan
- Provide helpful “paperwork”
- Take care of the technology
- Make it personal
- Share your excitement and build their anticipation
- Send a welcome package
- Recruit an onboarding buddy for them

# A Memorable First Day

- Make a short video of some current employees talking about the company's core values and what they mean.
- Meet and greet virtually with the team through a virtual happy hour or coffee.
- Since you can't take them to lunch, send them a delivery gift card.
- Be sure to provide for breaks.
- Ask the new hire to document their first day with photos and/or video and post to team chat.
- Share expectations, especially those involving working from home.
- Share some of yourself.

# Nudge Your Neighbor

What is something you could do on their first day to make it more memorable for a new hire?



# Day 2 and Beyond

- Keep up opportunities to engage and collaborate
- Check in regularly
- Let them know they're seen
- Introduce & immerse them in your culture
  - Lunch or coffee roulette
  - Team fun activities
  - Ask me anything (AMA)

# Best Practices

- Give them STUFF
- Let them know the plan
- Break up the tasks rather than overwhelming with everything at once
- Let them see you
- Create time for extra one-on-one manager check-ins
- Introduce the team
- Use communication methods
- Encourage fun
- Streamline formal activities where possible
- Foster a team spirit
- Ask for feedback



## **Re-Onboard If They Move to the Office**

- Be thoughtful
- Orient them to the facilities
- More frequent one-on-ones
- Reactivate the buddy system

# Nudge Your Neighbor

What is something you think is most important to remember about remote onboarding?



**Close**

# Review

Making Onboarding  
Effective... and FUN



Using a Buddy  
System



Remote  
Onboarding



# Action Plan

- Choose one of the goals of onboarding that was weak for your company.
- Identify at least five things you can do to strengthen that area of onboarding.
- Determine a deadline for each item.



# Onboarding

## A workshop

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<https://www.niceincontact.com/>

Developed by Elaine Carr and Laura Grimes  
of Harrington Consulting Group  
(<https://www.harringtonconsulting.us/>)



# Speaker Notes – Slide 6

**PREPARATION:** If **presenting in person**, prepare three flipcharts as above and scatter them around the room with markers.

If **presenting virtually**, use three chat pods, a whiteboard divided into three parts, three open-ended poll questions, or just have everyone answer the questions in the chat.

As people arrive, welcome them and encourage them to find a place. Once they are settled, they should answer the questions.

Keep this slide displayed until you are ready to start the class – which will probably be a few minutes after the start time. This pre-activity not only engages people from the moment they arrive, signaling that this will be a workshop requiring their active involvement, but it also gets people comfortable interacting in the room (virtual or in-person) and with each other. Be sure to circulate and introduce yourself to people. Virtually, you should comment (without judgment) on the responses people are posting.

If presenting virtually, you might also ask people to introduce themselves in the class chat.

# Speaker Notes – Slide 7

Briefly introduce yourself and go over any housekeeping matters that are needed (where the rest rooms are located, or what to do if you have to leave the workshop for a moment, for example).

# Speaker Notes – Slide 8

Go over the goal of the workshop goal and the agenda.

# Speaker Notes – Slide 9

Onboarding is that time when a new employee joins the company, and it has several goals as listed on this slide.

Take a moment and think about your own onboarding program. How well does it do each of these things? In your workbook, rate your current program in each of these areas on a scale of 1-5, where 1 is very poor and 5 is outstanding.

*[Give a few minutes for participants to do this. If people are from the same company, then turn this into a small group exercise and give them 5 minutes to assess their current program.]*

When complete, ask participants to give their program an overall score between 1-5 and then ask for a show of hands for each number (or do a poll if presenting virtually). If the participants are from the same company, then turn this into a discussion of the weakest aspect of the existing onboarding program and the strongest aspect of the program.

# Speaker Notes – Slide 10

Here are some stats about onboarding to show the impact it has on employee retention and proficiency/productivity. And on that first stat (33% look for a new job within 6 months), for Millennials, that percentage is higher, and they start looking sooner.

New employees are generally very excited to be there and have a good amount of energy, but what do you think happens to that energy and excitement if the new hire spends 80% of their first week reading policies and procedures, comparing insurance plans, and signing forms? Yes, it goes right down the drain.

So in our workshop today, we want to focus on how we can tap into new hires' energy and excitement more effectively to help them get up to speed more quickly and foster engagement.

# Speaker Notes – Slide 12

If presenting virtually, make these poll questions.

If presenting in person, ask each question, and use a show of hands to find out people's selections.

If anyone chooses some other time/timeframe, try to find out what timeframe they are thinking about.

# Speaker Notes – Slide 13

Here are the stages of onboarding we will be covering. And from this list, you can see that we advocate for onboarding to begin before the first day – ideally when the person signs and returns their offer letter – and continues through their 1-year anniversary.

Many employees report not feeling fully knowledgeable about how their company works until they reach their 1-year anniversary, even if they are working and being productive at their jobs. It takes time to learn how a company operates and how all the moving pieces fit together.

# Speaker Notes – Slide 14

As soon as a new hire signs and returns their offer letter, onboarding should begin.

- You want to stay in touch with the new hire in the time before they begin so that they don't begin to doubt the reality of the new job.
- One way to do that is to have everyone who interviewed the person individually send them a note of congratulations, spread out over a week. The person will begin to feel plugged into the company and as if they are welcome.
- Send out helpful information to the new hire, such as –
  - Where they should park on the first day
  - What entrance to use
  - What time they should report on the first day and the usual hours thereafter.
  - Who to ask for when they come in
  - Anything they should be sure to bring with them
  - Is there a cafeteria on site or should they plan to bring a lunch or plan to go somewhere nearby
  - The usual office attire (i.e., dress code)
- Create a detailed agenda for the employee's first week. This doesn't have to be provided before the first day, but it needs to be prepared before the first day.
- Also create a 30-60-90-day plan which sets out goals for the employee to accomplish by each of these milestones.
- If equipment needs to be ordered for the employee, do so, and then make sure they have all the software they will need set up and ready to go. Their area should look attractive, neat, and comfortable.
- Before their first day, put in the requests that add the employee to all of the appropriate email distribution lists and get them access to the drives, folders, and applications they will need.
- A day or two before they arrive, announce their arrival to the team so that everyone has their name and knows a little about their background. And they are ready to be welcoming.
- A welcome gift could consist of some company swag – a branded shirt or notebook or pen or water bottle or something else that conveys the message that they are part of the company.
  
- Anything else you would add to this list?

# Speaker Notes – Slide 15

They should pair up with someone sitting nearby and share their response to this question. Allow 1 minute for responses and then move on.

**If presenting virtually,** have them respond in chat or do a private chat with an assigned participant in the workshop.

# Speaker Notes – Slide 16

During the first week, you want to motivate your new employee to do a great job in the weeks to come. So you want to make the first week and first introductions as comfortable as possible rather than as if everyone else is awkwardly judging the new hire. Cultivate a program full of acceptance and comfort their first week.

You might consider putting new hires into an email nurture track that delivers culture insights and tips every week to help them further understand what is important to the organization. Only 25% of employees worldwide feel connected to their company's mission, and 50% do not find meaning or significance in their current role. Use the first week of employment to lay the foundation for better connection and engagement.

# Speaker Notes – Slide 17

Formal orientation needs to cover three areas: The Industry, the company, and the department. Those are some pretty broad areas, so this diagram helps break them down. Many of these things may be covered by HR in their orientation, but somethings more specific to the role will not be.

What is of prime importance during orientation is showing the new employee how they can contribute to the organization's purpose and how their efforts contribute to achieving the organization's goals and fulfilling its purpose.

# Speaker Notes – Slide 18

Break up into small groups of 3-5 people each and have them come up with at least three ideas for making the first week more engaging for a new hire. How might we cover all the necessary information in a more engaging manner?

Allow 5 minutes and bring everyone back together. Have each group briefly report back on just their best idea.

# Speaker Notes – Slide 19

The first 90 days are not just about learning the job, although that is hugely important. They are also about integrating into the culture and seeing in concrete ways how the new employee fits into and supports the organization and team's purpose. They need to receive recognition in front of others for their unique contributions. These need to be real contributions, and yes, they need to happen in the first 90 days. This will connect the employee more firmly to the organization, team, and their work, increasing their engagement.

Then the employee and their supervisor need to co-create the plan for the next 90 days. What growth, insight, and groundbreaking results will the employee strive for?

# Speaker Notes – Slide 20

During the rest of the first year, there should be new goals set by the employee and their manager each 90 days and regular meetings to assess progress against those goals. And while training and job shadowing will be less, still provide these as the employee's skills and understanding deepen and they can integrate new information and skills. Finally, be sure to recognize the employee's accomplishments and contributions. We want the employee to know they are recognized and appreciated.

# Speaker Notes – Slide 21

A lot of companies don't recognize or celebrate anniversaries until someone has been with the company at least five years, if not ten. But ten times as many employees leave at one year vs. five years. There are some definite benefits of recognizing and celebrating the first anniversary as a major milestone – as the research by O.C. Tanner shows on this slide. So make a point of celebrating (not just acknowledging) an employee's first year anniversary. At one year, employees feel like they've made it through the learning curve and have started adding value. Give a gift or symbolic award that recognizes each new hire's first year contributions and reinforces the right choice was made a year ago.

# Speaker Notes – Slide 22

They should pair up with someone sitting nearby and share their response to this question. Allow 1 minute for responses and then move on.

**If presenting virtually,** have them respond in chat or do a private chat with an assigned participant in the workshop.

# Speaker Notes – Slide 24

A buddy is usually a peer to the new hire who has more experience in the company and can provide guidance when needed.

They may be called peer mentors or some other name, but the program is generally the same. In this section, we are going to look at how to set up an onboarding buddy program.

# Speaker Notes – Slide 25

Here are some of the benefits of a buddy program for the new hire, for the buddy, and for the organization. A new hire might not want to constantly pester their manager (or the instructor in a new hire class) with questions and can often find it easier to turn to a peer – especially one who has volunteered and been designated to answer the new hire's questions.

# Speaker Notes – Slide 26

The goal of the buddy is not to be the new hire's best friend but to make sure that the new hire is set up for success. The specific goals of the program are listed on this slide.

If some participants have a buddy program in place (whether formally or informally), ask them what other goals do they have for their programs.

# Speaker Notes – Slide 27

Buddy programs generally begin before the new hire's first day and continue for about three months (rather than the full year of onboarding). By the three-month mark, the new hire will have a lot more knowledge and have developed some relationships that will make the buddy less needed. That doesn't mean that the new hire won't turn to the buddy at a later time, especially if they have developed a good relationship, but it means the primary goals of the buddy program are generally met in the 3-month timeframe. However, it might need to be longer, especially for programs with longer new hire training periods.

We are going to talk about selecting buddies and expand on the stages in the next slides.

# Speaker Notes – Slide 28

They should pair up with someone sitting nearby and share their response to this question. Allow 1 minute for responses and then move on.

**If presenting virtually,** have them respond in chat or do a private chat with an assigned participant in the workshop.

# Speaker Notes – Slide 29

ANIMATED – After a 1 second delay, the Criteria will appear one-by-one. Then on [CLICK] the process will appear one-by-one.

Here are some criteria put together from several different companies with successful buddy programs. [Let them read the criteria as they appear on the screen.] ASK, did anyone have any other criteria they came up with?

[CLICK] Then here is the process for selecting buddies. You want to make things as visible to everyone in the company as possible so people can really self-select to volunteer. You don't want any heavy-handed pressure put on anyone as they won't be as effective in the role without really wanting to do it.

# Speaker Notes – Slide 30

## Pre-start:

- Write a warm, welcoming email to the new hire introducing yourself.
- If a welcome packet (possibly with company swag) was sent, check to see that the new hire received it.
- Set up a time (and phone number) for a phone call before their first day to help ease any nervousness and help answer any questions.

## Orientation:

- Meet the new hire in person and welcome them to the company. Introduce them to others.
- Have a 1-hour meeting with the new hire to do a “company culture 101,” giving them an outline of your experience with the company and being a resource for their initial questions. This is a CONVERSATION and not a PPT presentation.
- Make plans for an uninterrupted, non-rushed lunch.
- Give them an overview of communication tools (such as SLACK or TEAMS channels, email distribution lists, and other tools your company uses to share information).

## Momentum:

- Support the new hire's social integration by:
  - Setting up coffee or lunch with at least five different people from across the company.
  - Accompany the new hire to a company event or extracurricular activity
  - Discuss what you wish you knew when you started as a new hire
- Discuss professional balance with questions like these:
  - How is the schedule working for you?
  - How comfortable are you with the internal tools?
  - How are you balancing your personal & professional life?
  - How can I help you [learn more, get more acquainted, be more productive, etc.]
- Have open conversations about professional development opportunities and give them the resources they may need.
  - Is there anything you want to learn?
  - Do you need help navigating learning technologies?
  - What will you need from everyone around you to make sure you are successful?

# Speaker Notes – Slide 31

They should pair up with someone sitting nearby and share their response to this question. Allow 1 minute for responses and then move on.

**If presenting virtually,** have them respond in chat or do a private chat with an assigned participant in the workshop.

# Speaker Notes – Slide 32

- **Focus your attention on the new hire:** Do not be concerned about being perceived as the expert; instead focus your attention on the new employee
- **Be patient:** It takes time to develop a relationship – don't force meetings or try to cover everything right away.
- **Be positive:** New employees will grow into their roles if given proper reinforcement. Maintain a good attitude and a teaching spirit. Try to focus on the positive even with difficult co-workers.
- **Be flexible:** It is important to identify the new employee's personality and communication style and adapt accordingly.
- **Don't get in the way of the new hire's relationship with their direct manager:** The new hire needs to develop a relationship with their direct manager during this time and the buddy can easily get in the way of that. Encourage the new hire to take appropriate topics to their manager. The manager should be directing the new hire's work and not the buddy. The buddy role is that of support and guidance, not direction.

# Speaker Notes – Slide 34

Pose the question to the group and get their ideas.

Some areas they might bring up:

- Remote onboarding is more streamlined. And faster. The literal process of signing on to the team is simplified by the conveniences of reduced paperwork. Contracts and manuals can be distributed, signed, and filed digitally.
- Physical distance can make routine parts of onboarding remote employees more complicated or even off-putting. For example, equipment and account setup can get challenging. It's less convenient when you have to ship computers and office supplies. And not having an IT team member present can add to the challenge. Employees are left to troubleshoot on their own or get virtual coaching.
- Perhaps the greatest challenge with remote onboarding is the lack of in-person communication. Never having physically met managers, HR reps, or team members can leave new hires feeling isolated. If the process is too streamlined, you run the risk of making it impersonal and disengaging.
- Another challenge with onboarding remote employees is that it can turn into an impersonal process, thereby promoting the sense of isolation rather than connection.

Remote onboarding shouldn't just be the online version of in-person onboarding. Your process provides an opportunity to address the challenges of isolation and disconnect many remote workers face.

# Speaker Notes – Slide 35

Remote onboarding has few more potential failure points than in-person onboarding. Here are a few to watch out for and mitigate where possible. *This is a good place to share a personal story of remote onboarding, or solicit one from a workshop participant.*

# Speaker Notes – Slide 36

The checklist for remote onboarding is not that much different than for in-person onboarding. The things that are added included:

- **Warmly welcome them and set expectations.** Send them a congratulations email or even a handwritten note and let them know what will be happening to get them ready to start on Day One.
- **Prepare a training plan.** Sign them up to attend online instructor-led classes and orientations as necessary.
- **Provide helpful “paperwork.”** Contracts and employee handbooks can be distributed, signed, and filed all online. And why not get this out of the way before the first day?
- **Take care of the technology.** Order the equipment to arrive before the employee’s first day, making sure that all needed software is downloaded and installed before shipment. When their equipment is on the way, send the new hire a note that includes a list of items in transit, the package tracking information, and relevant setup instructions. Walk new employees through the process with videos or brief training sessions.
- **Make it personal.** Have a few co-workers send welcome emails and arrange some virtual coffee chats for people to meet and talk informally.
- **Share your excitement and build their anticipation.** If there is enough time before their first day, send them a handwritten note of welcome through the mail that expresses your excitement for their arrival.
- **Send a welcome package.** Put together some company-branded items to help the new hire feel like a part of the team. Include welcome notes and a treat – a gift card or a snack delivered to their home. This also helps make things more personal.
- **Recruit an onboarding buddy for them.** Yes, buddies work equally well remotely.

**Plus all of the other things on the regular onboarding list.**

# Speaker Notes – Slide 37

Here are some things that can make the first day for a remote employee more memorable.

One of the things that often happens with remote workers is that they don't provide themselves enough breaks. Make sure to provide breaks for them in their week one schedule to establish how important they are.

And for first day documentation, What does their “commute” look like? Their working space? Who else is in their space (pets, family members, roommates, etc.)? This helps their co-workers get to know them. Hopefully, these get posted to a shared space where their co-workers have also shared pictures/video about their working environment.

Finally, the new hire is going to be more comfortable if the focus is not just on them. Share some of who you are. What you reveal about yourself will build trust right from the start.

# Speaker Notes – Slide 38

Allow 1 minute for responses and then move on.

# Speaker Notes – Slide 39

Okay, the new hire has had a memorable first day, but you can't stop there. You have to keep the momentum up.

- **Keep up opportunities to engage and collaborate.** Schedule team meetings, formal and informal. Aside from the regular team or all-hands meetings, consider including team-building activities. Set up channels or social media groups where people can interact informally. This creates social connection and provides opportunities for quick, casual conversations about issues or questions that come up.
- **Check in regularly.** Ensure employees have the resources they need on an ongoing basis. Ask for feedback on a regular basis to see how things are going.
- **Let them know they're seen.** Don't let the reduced visibility affect employees' presence. Keep them in mind for active and important projects. Have regular touchpoints for projects they are working on.
- **Introduce & immerse them in your culture.** Help new hires out by scheduling time for teammates to connect outside of their day-to-day. Here are some ideas to consider:
  - **Lunch or coffee roulette:** Randomly pair employees with people across the company for virtual lunch or coffee. In addition to giving new employees the chance to connect with people they might not have met otherwise, this also helps them better understand your company and its different functions.
  - **Team fun activities:** On a weekly or bi-weekly basis, block out 30 minutes for employees to participate in something fun. A game of trivia, for example, can help a new hire show off their passions and get to know their teammates better.
  - **Ask me anything (AMA):** During your team meeting, help your team get to know your new employee better by adding a brief AMA to the agenda. By putting your new hire in the hot seat and letting their teammates ask questions, they'll discover shared interests — like a favorite vacation spot or ice cream.
- ASK, What else do you do to help not only new hires but all of your remote team feel more connected?

# Speaker Notes – Slide 40

Many of the best practices with remote onboarding are important for any onboarding, but they become more important with remote feedback as there is more of a tendency to feel isolated and disconnected when working remotely.

- **Give them STUFF.** It really means a lot when you receive a company-branded coffee mug or mouse pad. It fosters a sense of connection.
- **Let them know the plan.** Collaborate with a shared doc of the first-week to-dos and expectations where the new team member can comment and check things off. This includes a checklist of remote work best practices, hardware needs, Wi-Fi requirements etc.
- **Break up the tasks rather than overwhelming with everything at once.** Nothing freaks a person out more than seeing a long list of to-do items. Especially if they are sitting at home and are still trying to work out all the tools, email, and communication streams.
- **Let them see you.** Use your camera.
- **Create time for extra one-on-one manager check-ins.** 72% of employees state time with their direct manager is the MOST critical part of the onboarding process. The new hire gets to ask for feedback and make sure they're on the right track. And their manager gets an opportunity to learn more about the employee and their working style. Especially in a remote setting, it can be beneficial to have short, more frequent meetings. This ensures new hires never go too long without having the opportunity to ask questions or get feedback.
- **Introduce the team.** With the cameras on. It doesn't have to be a long meeting – just 15-20 minutes to make group introductions and allow the new hire to see the group dynamic.
- **Use communication methods.** Use Slack, MS Teams, Skype, Google Hangouts or whichever communication tool you use. These often feel less formal than email, so encourage new hires to participate in discussions.
- **Encourage fun.** 25% of new hires consider making friends a top concern. So encourage fun activities in virtual discussions and communication streams. Activities such as matching baby pictures to the actual employees, Conference call or Zoom call Bingo, etc.
- **Streamline formal activities where possible.** What new hire paperwork can be completed in advance of the first day? Which tasks can wait until next week? Let's reduce the amount of time spent in the first week weeding through policies and paperwork.
- **Foster a team spirit.** Do fun things together, ask for input in team meetings, be friendly and personable.
- **Ask for feedback.** Ask your new hires to rate their onboarding experience so you learn what's working — and what isn't. This is especially important in a remote environment where new hires aren't able to share their feedback through casual conversations or in-person sessions

# Speaker Notes – Slide 41

If a remote hire later moves into the office, it is a good idea to re-onboard them. The environment really does make a difference.

- **Be thoughtful.** Make an extra effort to help these employees feel particularly welcome, as if it's their first day at the office - because it is! Consider leaving something special at their desk, be it a personal note, company swag, or other small gift.
- **Orient them to the facilities.** Do an actual tour, pointing out the copy machine, printers, rest rooms, break rooms, vending machines, cafeteria, fire exits, and conference rooms (with how to sign-up for these) in particular.
- **More frequent one-on-ones** may be necessary for a time, just like when they first joined the company. We can't take for granted that since these people have been with the company for awhile, they are completely comfortable with the new environment.
- **Reactivate the buddy system** with a buddy who is comfortable and familiar with the office. This might be needed for a shorter time than the original onboarding buddy, but it can help combat any insecurity in the new environment.

# Speaker Notes – Slide 42

Allow 1 minute for responses and then move on.

# Speaker Notes – Slide 44

Let's review each of the three topics we covered today. As I bring up the topic on the slide, I want you to call out some important points that we covered about that topic. [CLICK] to bring up each topic. Allow about 1 minute for people to call out their points before going to the next topic. Try to keep this moving at a pretty fast pace.

**If presenting virtually,** People can unmute and call out their answers or have people respond in chat with points for each topic. You might need to give them a little bit more time for typing.

# Speaker Notes – Slide 45

Allow 5 minutes or so to complete the action plan. If time allows, have people briefly share one of the action items they selected.

Make your final comments and thank everyone for participating today.