Using Lytho Workflow to Onboard New Team Members

March 31, 2022

Agenda

1. What is it like onboarding without an organized process?

2. What goes into a good onboarding experience?

3. How to use Lytho Workflow to structure onboarding

4. Q&A

Lytho.

Presenters

Tyler Biehl
Implementation Consultant,
Lytho

Sarah Tinsley
Enterprise Customer
Success Manager, Lytho

Possible Pitfall:

BUZZ KILL

Meet your new team member's excitement to join your team by having an organized, thoughtful training plan.

A defined onboarding road map outlines expectations, provides transparency and accountability, minimizes isolation and reduces overwhelmingness — for all parties.

Possible Pitfall:

UNNECESSARY INSECURITIES

Science legitimizes the dangers of information overload. Provide a snackable overview of the onboarding experience with key milestones called out to provide a sense of progress and success.

Possible Pitfall:

INFORMATION OVERLOAD

Possible Pitfall:

INCONSISTENT MESSAGING

Inconsistent onboardings leave a team vulnerable to varying understandings of expectations and responsibilities, which encourages individuals to make assumptions.

Possible Pitfall:

NO END IN SIGHT

New team members want to demonstrate value as quickly as possible, and a clear path to the onboarding finish line helps prepare their mental shift from trainee to expert.

Old Method (Nigel Newguy Onboarding Agenda)

Welcome to Lytho! We are so excited you're here and have designed this schedule to help you settle into your new role and get up to speed. While this is a helpful schedule, know that some meetings may need to be rescheduled due to unanticipated conflicts. When in doubt, trust your Outlook calendar!

Also know – if there are areas of information you are missing or need, work with your manager and mentors to help full the gaps. The real learning always begins when you start working with customers! We'll be here to support you every step of the way.

Monday, June 7th

8:30am   Check-In (5-10 mins)
- **Attendees:** Ivan Implementation – Implementation Consultant - Mentor
- **Agenda**: Quick call to be sure you are set up!

9:00am   Company Overview (50 mins)
- **Attendees**:
    - Cynthia CEO – *CEO*
    - Hilda HR Rep – HR Specialist
- **Agenda**:
    - Introductions
    - Company Overview
    - North Star, "Where passion and ability meet the market"
    - Company Values
    - Placemat (Top Line Goals)

New Method (Utilize Lytho Projects!)

Learning the Company

Points to Consider

- Make it easy to ask for help in a way that works *with* your busy team

- Give your users one place to access all their to dos

- Offer ways for your team to feel engaged without putting them on the spot

- Provide resources that new team members can use to better understand their role on your team

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Learning the Product

☑ Set a Due Date for this Project

OVERVIEW   FILES   TIME

Description
1. Close this task and on the main project view
2. Click "Add Due Date" in the project details panel on the right side of the page
3. Select tomorrow's date on the calendar
4. Click Save

🎉 Celebrate! 🎉

Need more help? Learn all about project due dates: https://guide-ignite.inmotionnow.com/help/editing-project-details#project-start-due-date

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☑ Add Yourself as a Member of this Task

OVERVIEW   FILES   TIME

Description
Members of a task, proof, project, or campaign will be able to see and edit that particular work via global search, in custom views or their My Work, My Projects, or My Campaigns list views. Adding a team member (other than yourself) immediately sends a notification to let that user know they have something new to check out.

See "Members" on the side panel to the right of this task?
1. Click the + icon
2. Find your name
3. Click your name
4. Click the X next to "Manage Members"
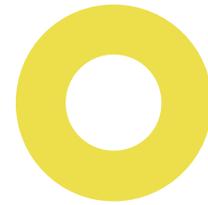
You've added yourself to the task!

💥 SUCCESS! 💥

Points to Consider

- Provide instructions where possible

- Provide context when it's not obvious
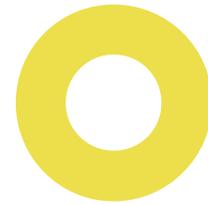
- Provide documentation as a follow up

Quick Demo

Final Takeaways

- Be mindful of potential pitfalls

- Continue to evaluate your onboarding experience

- Leverage Workflow!

Questions?

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