



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



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 fill 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!)

Webinar: Everything You Need to Know about Lytho! To Do

OVERVIEW CALENDAR

Add Task Add Proof Add Group Edit Blockers

Welcome! ✨

- ✓ Get to know this project!
To Do WEBINAR
- ✓ Connect with your Onboarding Guide
To Do WEBINAR
- ✓ Meet with HR to review paperwork and benefits
To Do WEBINAR
- ✓ Company Values
To Do WEBINAR
- ✓ Read the 2021 "Placemat"
To Do WEBINAR

Add a task...

Company-Wide Systems & Tools 🔧

- ✓ Microsoft Outlook: Update Your Signature
To Do WEBINAR

Webinar: Start Learning Lytho Workflow To Do

OVERVIEW CALENDAR

Add Task Add Proof Add Group Edit Blockers

Get to Know Lytho Workflow Using Common Steps

- ✓ Set a Due Date for this Project
To Do WEBINAR
- ✓ Update the Project Status to In Progress
To Do WEBINAR
- ✓ Set a Start and Due Date for this Task
To Do WEBINAR
- ✓ Add Yourself as a Member of this Task
To Do WEBINAR
- ✓ Send this Proof to Yourself for Review
To Do WEBINAR
- ✓ Enter LOE for this Task
To Do WEBINAR
- ✓ Add a Tag to Indicate This is a "Digital" Task
To Do WEBINAR
- ✓ Add a Comment to this Task
To Do WEBINAR



Learning the Company

Connect with your Onboarding Guide

To Do

OVERVIEW FILES TIME

Description

Everyone Deserves an Instant Work BFF! ❤️

Your Onboarding Guide will be a go-to resource to make your onboarding experience as successful and easy as possible. Your Guide is ready to answer your questions! This is your task to attend your first of many weekly meetings with your Onboarding Guide and prepare at least 2 questions to ask!

Your Guide is going to be Caleb! Use the comment section below to send them a message by typing '@' and then their name!

Convert to Proof

Add Time Entry

Start New Timer

Assignees



Project

 [Webinar: Everything You Need to Know about Lytho!](#)
32

Priority

 Add Priority

Start Date

 Add Start Date

Due Date

 Add Due Date

COMMENTS ACTIVITY



Add a comment...



Tyler Biehl

Mar 17, 2022 at 1:22 pm

Caleb Eisenhower Hello! I look forward to working with you.

Reply 



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

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! 🌟

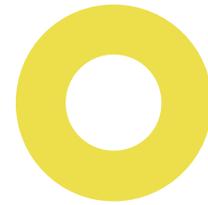
Points to Consider

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



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Quick Demo



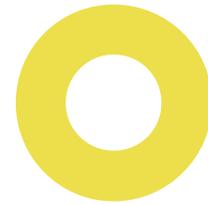
Final Takeaways

- Be mindful of potential pitfalls
- Continue to evaluate your onboarding experience
- Leverage Workflow!



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Questions?





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