Onboarding and Training Plan Development: Adapting to Remote Work

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Abstract

This professional action capstone project was done to address my work department’s lack of preparedness to onboard and train new employees since our office moved to remote work. The focuses of this project were ensuring we had the technical ability to train a remote employee with options to interact with them via screen sharing and video conference, a new comprehensive training plan, and the storage of that plan and all related files or documentation in a shared and easily accessible location.

Keywords: remote, onboarding, training, new-hire
Capstone Project Introduction

Two main factors inspired this capstone project. The most pressing one was our move to remote work almost a year ago. Our entire workflow was based on in-person work. We figured out how to support remote work for current employees, but we hadn’t considered how to onboard and train future ones. The other main inspiration was my concerns about our training program after experiencing it firsthand. I had worked with our pharmacy software for several years prior to starting this job. That allowed me to go through training knowing a lot of what I was being taught while considering how well it would prepare somebody without experience to support our pharmacy clients that use our software. I have felt that our training program was lacking in its ability to teach the myriad complexities of our software, so the opportunity to address my concerns about our training plan while preparing us to onboard future employees was perfect.

Another concern that had to be addressed as part of this project was determining how we would train a remote employee over the internet. I was concerned about our ability to train a remote employee effectively and efficiently with the technology we have available today. A new training plan would be worth very little if we did not have the ability to deliver that training easily and effectively. It was also critical that the training was offered in a personal and interactive way because those interactions would introduce the new employee to all of us and integrate them into our team culture.

I started the project by collecting all the training materials we have. I also had a discussion with my manager regarding the project and what I wanted to accomplish through the process. I then created a survey for my team to complete to determine their confidence in our ability to onboard and train a new remote employee. Next, I looked at the software and tools we have available today to determine if they could be used to train somebody. After that, I reviewed
our training materials and created a rough outline of what we have trained in the past and identified the training areas and topics that I felt were missing. I used those results to put together a training plan that begins with the basics of our software and then builds up from there. I organized my plan and the new documentation I had created onto a SharePoint page so our team could access the information easily. Lastly, I presented the results of my capstone to the team and then sent them a follow-up survey to determine if they felt any more confident in our ability to successfully onboard and train a new employee.

Elements Coming Together

I initially set out to redesign our onboarding program and either focus on the technology we need to successfully onboard and train a new analyst or on the content and structure to improve the program’s quality and value. Once I dove into the project, I found that our current technology would work very well for training a new employee. As such, most of the hours invested in this capstone were spent on the content and structure of the program. As the new plan came together, however, I realized that we needed a place to save the plan, organize it alongside any related materials, and do so in a way that made it easy to access and visible to everyone. This meant the real technology need for the project was something I had not expected.

Another aspect I did not expect initially was the fact that I was in a unique position to approach this project from multiple different perspectives. I have used the software that my department supports, and I learned it in a role that required me to have an expert understanding of how it worked for the end users and a general understanding of how it worked behind the scenes. I also have experience training new users of our software, and that experience taught me that everybody learns a little differently. As a new employee myself, I was learning about the complexities of the back-end processes for the first time. We also hired a new analyst six months
after I started, and they had no experience with our software or a basic understanding of how it worked. The totality of my experiences plus being involved in the training of our newest employee enabled me to evaluate the project’s outcomes from multiple points of view and avoid creating anything that would negatively impact future trainees.

While I was uniquely prepared to complete this project with consideration for multiple audiences, I also knew that onboarding and training a new employee is that critical period when we are getting to know them, and they are getting to know us and learning our team’s dynamic. It also serves as our first opportunity to make an impression on the new hire. It is important that we make our new hires feel like we are ready to prepare them for success in their new role. A detailed training plan shared and understood by everybody on the team helps to instill trust and confidence in the new hire because there’s a clear path towards proficiency and eventual expertise.

Starting a new job also has a significant emotional component to it. We have all been that new employee that wants to do well and impress the people we work with. Struggling to learn how to do your new job can be stressful and discouraging, so it’s important that the environment we create for the incoming employee is welcoming, the expectations are clear, and our approach considers how they learn best. It will be important for us to check in with our new hire, separate from the training material, to find out how they feel about what they are learning and how well they are understanding it. If we were working in an office environment, these types of conversations might happen in the lunchroom or at the water cooler. Since we are remote, it will be important for us to periodically check in about how they feel so those interpersonal relationships are formed, and the interactions are not all about their training.
The project did require some creativity because we needed a central, shared, and easily accessible place to house the new training plan and any related information that gets created in the future. I decided to create a SharePoint page because I have used SharePoint at a previous job and found it to be incredibly valuable for our department. Rather than having to remember which shared drive or network folder contains the information somebody needs, the SharePoint site will make it much easier to search for and find what we’re looking for. It also gives some visual organization because it looks like a website, and most people are familiar with navigating websites to find information.

Innovation in the project can be seen in the training plan I created and in the SharePoint site created to hold it. The training plan is innovative because it is based on what I know and have learned since I joined the company in addition to my experience as an end user and trainer previously. It’s also entirely different than the existing training plan because it trains in modules that build upon each other over time. The innovation in the SharePoint site is introducing new capabilities to the team. We have talked about using this program previously, but there hasn’t been a compelling reason to implement it. Since this capstone’s intent is to produce a new training program, it seemed fitting to also introduce a new way of sharing it.

**Results**

I measured the impact of the capstone project by surveying my team before and after the project. The original survey had five questions that were intended to capture how each person felt regarding our preparedness for onboarding and training a remote employee and if they felt we had the technology to do so. I also asked them how they felt about our onboarding and training program, the documentation we have available to reference, and an open-ended question
about what they would request to improve our ability to bring on and support future employees. Please see the link in Appendix for full details regarding the survey questions and responses.

The key question for measuring impact was question number one, “How prepared do you feel our team is to onboard and train a new Support employee?” 60% of the answers improved from the first survey to the second. Another question that measured impact was number 3, “Which of the following best describes our [current / revised] onboarding and training program?” 100% of the responses improved from the first survey to the second. The last question is one that was only asked after I presented the results of my capstone project. The question asked was, “True or False: Considering what Nick’s project has made available to our team, I feel that we are more prepared for onboarding and training a new employee.” 100% of the answers were True.

The most significant benefit to future Support employees, our primary stakeholders, is that they will receive formal training based on a detailed checklist that will ensure they have all the basic knowledge required of a Level 1 Support Analyst. Training of new employees going forward will also be consistent in both content and delivery.

The actual impact on the primary stakeholders is yet to be seen since we have no new employees starting any time soon. The impact to other stakeholders, such as us current employees, is an upcoming training refresh to ensure consistent understanding of the items included on the training plan.

**Conclusion**

When I started this project, my main concern was about what software or program we could use to train somebody remotely, and I did not expect one of the programs we use now to be capable of meeting our needs. My fight-or-flight response was bracing itself for a frantic search
to find some software program that would do everything we needed. This ended up being the least of my worries because we can accomplish everything we need to do by using our remote support software and video meeting via Teams or RingCentral.

As for the training plans and materials, I expected to collect a lot of fragmented training lists and outdated process documentation that would not be very helpful. I was a bit surprised to find how limited our training plan was. It was a simple Monday thru Friday calendar with hours of training blocks labeled with high-level topics to be covered. The content that those blocks covered were kept in our manager’s head. Now that we have a full plan and checklist, we will be able to share training responsibilities across the team.

If I had to do this project over again, I would create the first part of the training plan up front so I had an example of the plan to share with the team. This would give them a chance to weigh in on the direction I was going with the project. Involving them in the project as the work was developing would have given them some ownership in the outcome.

Section 5: References

Appendix

https://drive.google.com/file/d/14OkSmGPkOdPUMZ1IOC9j_wliOLvZKJJT/view?usp=sharing

Recording of Capstone presentation to Work Team: Capstone_Teams_Presentation_04-18-24.mp4
References

- Needs to be in APA format
- LINK to References at Online Writing Lab (OWL) Purdue