Onboarding Blueprint

By Jonathan DeVore – The Accidental Trainer

This workbook is to be used with the Salesforce Onboarding Blueprint. It is not copyrighted – you can share everything in this workbook with your clients, your peers, your friends, and your user groups.

ScreenSteps

Lesson 1 – What's the problem?

Activity

Scenario: You've noticed new users aren't using Salesforce correctly at first, and it takes about 3 months of you answering emails before they can be independent. You've also noticed they tend to get a lot of "tips" on what to do from their co-workers; most of the time, the tips are wrong.

Exercise: Write down a list of 5 areas this is having a negative impact:

1.
2.
3.
4.
5.

Notes

In this section, take notes that are specific to your organization. What are some of the symptoms you're observing with your users? What is the negative impact it is having?

Do you agree with what Jonathan has defined as the root problem? Would your organization change if onboard training focused on helping users *do* their job instead of focusing solely on unloading information?

Lesson 2 – What's your goal?

Activity

Scenario: You want to make a SMART goal to help you know whether your efforts are having an impact.

Exercise: Write down a SMART goal for the scenario in Lesson 1:

Specific	
Measurable	
Achievable	
Relevant	
Time-bound	

Notes

In this section, take notes that are specific to your organization. What is one SMART goal you can focus on during your next onboard training session? Try to tie it to a symptom you are observing.

Will you be able to measure that goal? Will achieving that goal drive down costs or increase revenue? How will you know?

Lesson 3 – What do users need to do?

Activity

Scenario: To accomplish your goal, you've identified the jobs (high-level actions) new users need to take:

- Convert Leads to Contacts
- Connect with Contacts
- Make Sales
- Follow up for additional sales opportunities

Exercise: Can you elaborate on the job "Convert Leads to Contacts"?

- Convert Leads to Contacts (**Job**)
    - (**Action**)
    - (**Action**)
    - (**Action**)
    - (**Action**)

Notes

In this section, take notes that are specific to your organization. What are some of the jobs that new users need to do? Can you include additional actions (e.g. checklist) that could clarify that job?

If you don't know the jobs, is there somebody in your organization who does?

Lesson 4 – Why aren’t they doing them?

Activity

Scenario: You’ve got a list of jobs and the associated actions documented.

Exercise: Determine whether training would help in the following scenarios:

1. **Call, email, or make personal visits to contacts** - New users aren’t doing this action because they’re not sure what to say when they meet with contacts. They lack confidence in their ability to hold a conversation.
2. **Log activities in Salesforce** - New users aren’t doing this action because it takes a long time to find the right record in Salesforce and log an activity.
3. **Offer additional products or services** - New users aren’t doing this because they don’t receive commissions on this type of sale.
4. **Engage with customer to learn their needs** - New users aren’t doing this because they lack people skills.

Notes

In this section, take notes that are specific to your organization. What are some of the reasons new users aren’t performing the actions related to your jobs? Here are a few options - lack of skills, lack of knowledge, a bad environment, or lack of motivation.

Do you think training could help?

Lesson 5 – Make job aids for the actions

Activity

Scenario: You've determined that new users aren't doing the actions because of a lack of skills and a lack of knowledge – training will help.

Exercise: In one or two sentences, describe how you would write a job aid to show users how to "Convert a Lead to a Contact."

Notes

In this section, take notes that are specific to your organization. Can you write job aids for the actions you've identified in your organization?

Remember to keep them minimal in information. Just include screenshots and brief descriptions to walk users through the steps.

Combine job aids for several actions to make a Standard Operating Procedure for one of the jobs you identified above.

Lesson 6 – Come up with activities

Activity

Scenario: You're preparing for the training and you want your users to practice the actions associated with "Converting Leads to Contacts."

Exercise: Write down a few ideas of some activities users go through to practice the actions:

1.
2.
3.

Notes

In this section, take notes that are specific to your organization. What are some activities you could have users do to practice the jobs and the associated actions?

Would it be a challenge to have users walk through the actions using your job aids? Can you figure a way around it?

We've observed that when organizations do not include job aids in their training, users are reluctant to use them. How can you help users reference your materials?

Lesson 7 – Run the training

Activity

Scenario: You are ready to run the training.

Exercise: Which of these would be the best option for doing your training:

1. Run through all of the definitions, do a demo of all the actions in Salesforce, then tell users about job aids as we're closing things up.
2. Tell users about the company background, explain the overall processes at a high level (committing them to memory), going through activities and having users perform actions using job aids, and making yourself available for coaching while users reference the job aids.
3. Share all of the processes in your organization, show which ones apply to your users, demonstrate how to do all of the processes first, then go through the processes as they follow along with you, and then let them know there are job aids available if they need help later on.

Notes

In this section, take notes that are specific to your organization. What is a future onboarding session you can prepare for? What would be your agenda following this new methodology?

What do you think the response from the users would be if you ran a training using the new methodology?

In the end…

If you’re not willing to approach a problem in a new way, you’re bound to get the same results as you have before.

If you need personal coaching to help you put an onboarding program together, let me know. I’ll be happy to chat with you and see how to make it work.

You can also reach out to me if you have feedback about the onboarding course. It has been modified to meet the needs of clients I have worked with, but that doesn’t mean it meets your needs. If I left something out, let me know so I can improve it for future Accidental Trainers

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