



# Training Ground

## Tips for a successful virtual onboarding experience

In our new normal, we are faced with having to onboard staff from a distance. For most of us this is a new experience, and without the right tools and practices it can leave a new hire feeling isolated, unsupported, and frustrated. When this happens, it has been my experience that the unsupported new hire will either leave, or worse, they will attempt to do the job lacking proficiency and competence.

To ensure that this is not a new person's experience, we have adapted the "learning path" approach, based on Steve Rosenbaum's book *Up to Speed*. In his book he speaks to the importance of having a learning path, and not just a path that shows you the formal training but a path that encompasses all aspects of learning, including on the job, and the critical role a learning path plays in someone's development. He reinforces three basic principles that are rooted in the learning path methodology.

### LEARNING IS A PROCESS, NOT AN EVENT.

Think of this in terms of a sport. Could you learn how to play baseball and play well all in one lesson? This is the same for a new hire coming into your practice.

How does your onboarding program stack up? Do you expect a new hire to attend a three-day workshop and be able to come back and perform? What support do you offer to the new person once they are on the job?

After formal training, a new person would have the basics and a general understanding of what to do, but they are a long way from being fully proficient! Their journey to full proficiency has just begun.

How do you currently map out a new hire's learning experience? What is included in this map? How do you articulate what the performance looks like so that your hire knows when they have achieved proficiency? To support this, consider defining proficiency for each role and what learning

process is required to set them up for success to achieve it.

A learning process is a sequence of learning activities that lead to a desired level of performance. It is knowing exactly what proficiency looks like for that role. Ask yourself, do you know what proficiency looks like for every role in your agency or are you just going based on your gut? If you are not clear on what true performance looks like it is probable that your new person and their supervisor/coach is not either.

### KNOWING AND DOING ARE NOT THE SAME THING.

Rosenbaum refers to the old saying "knowledge is power," and goes on to further elaborate in saying: "The real power is being able to use that knowledge!" For example, knowing how to facilitate a discovery discussion is very different than doing it (and doing it effectively). The challenge we are up against is taking what they learned in the formal learning environment and putting it into action. The focus needs to shift from the learning objectives in the classroom to what proficiency looks like on the job. What are the behaviours that a fully proficient, high performer demonstrates? Performance needs to be defined in terms of quality, output, and speed.

We need to shift away from knowledge testing as a form of evaluation and toward things like on-the-job observation. Getting 100% on a test shows that they *know* the information, it does not mean they can *do* the task on the job. This principle becomes even more critical in our new normal.

### TRAINING SHOULD BE BY DESIGN AND NOT BY ACCIDENT.

Formal learning is only about 10% to 20% of all learning. Data shows that the most impactful learning occurs informally and on the job. Unfortunately, much of this learning is unstructured and filled with trial and error. In these situations, the new per-

son will often never reach full proficiency due to inconsistent practices, unclear expectations, and the wrong staff supporting their development. Rosenbaum refers to this informal learning as the "mystery period." This is the learning that happens after the formal learning is done.

What happens once the new person has completed their formal training? Are they supported by their supervisor or coach with unstructured and unknown learning experiences? Does their experience and skill level rely on the quality of the person beside them? Has the person coaching them developed bad habits or undesirable shortcuts? In these situations, it not only negatively impacts the length of time it takes for someone to hit proficiency, but the agency also risks errors and omissions situations, or worse, the new hire that you invested time and money into may leave or need to be terminated; employee morale may be impacted; while agency branding with both clients and potential candidates can also be affected.

When the informal learning or "mystery period" happens by design rather than by accident, a structure and process ensures this learning is defined and effective. The supervisor, mentor, and new hire are clear on what proficiency looks like, how the new person will get to proficiency, and the roles and responsibilities of all parties involved in the onboarding journey. Taking the time to structure the "mystery period" means defining practice, coaching, observation, and evaluation coupled with frequent and ongoing feedback. 📌

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