



GUIDE TO ONBOARDING DIGITAL LEARNING TEAMMATES

You've hired a new teammate. Congratulations! You're probably hoping they'll jump right in and help you develop courses and training tools. But not so fast. First you need to onboard them. Onboarding can feel like a hassle, or even a waste of time, but it's the only way to make sure your new hire delivers their best work.



**Get organized
so you can
effectively and
efficiently
onboard new
teammates
every time.**

Your onboarding process should achieve two important goals: Equip your new hire to do the job. Help them feel like part of the team.

If that sounds like a tall order, it is. Onboarding takes planning and time, but the effort is well worth it.

Your employees will be happier, they'll do better work, and your whole team will collaborate more efficiently. This guide will help you get organized so you can effectively and efficiently onboard new teammates every time you hire.

1

SET UP PERMISSIONS AND ACCESS

Your team probably uses a whole suite of tools to complete daily work. These can range from the general: email, video conferencing applications, project management apps, to the highly specialized: proprietary LMS, CMS, etc.

Having access to these tools makes the job possible. Without them, your new hire is left twiddling their thumbs or, worse, feeling like an outsider. Make sure they have access to every tool they need. Set up their email address, give them access to shared folders, and make sure they know where to find contact information for the teammates, clients, and vendors they'll be working with.

2

SCHEDULE A MEETING



Even if you managed the entire interview process, you should still schedule a meeting to officially welcome your new hire. This makes them feel valued while giving you an opportunity to start equipping them with everything they need to do the job.

During this meeting you can:

- Provide logins for essential tools.
- Assign a mentor to help guide the new hire in their first few months.
- Provide SOPs and basic orientation.

Most importantly, this is your chance to set clear expectations for the employee and their onboarding process. One of the most common areas of confusion is around how to report working hours. Make sure the employee knows how to track and report their time. If they are a contractor, remind them to report how their hours are being used and give them a timeline for how often they should be providing updates.

3

TEACH THEM HOW YOU WORK

Your team has a certain way of doing things. No matter how seasoned the professional is whom you are onboarding, they probably won't know how to do things exactly the way your team does. So even when onboarding an expert, you'll need to explain the basics of how you expect tasks to be completed. Common stumbling blocks include:



HOW DO WE COMMUNICATE? Email, Slack, phone calls, Google Meet, there are dozens of ways to keep teams connected even when working remotely. Which one is your go-to and how can the new hire reach someone if they have an emergent issue?



HOW OFTEN DO WE COMMUNICATE? Do you expect the new hire to update you daily or weekly? Are there particular times that they can more easily reach team members? Has the team set aside time for particular tasks? Make sure they know about any standing meetings or other recurring events.



WHAT TOOLS DO WE PREFER? While some technical tools are nearly universal, your team may have ones that they prefer. For example, do you use Google Docs or Microsoft365? Maybe there's a native drafting tool that's more effective for what you do. Make sure your new hire knows what to use and how you like to use it.



WHO IS MY SUPERVISOR? Especially if you're working in project-based teams, your new hire might not know who they should report to. Make sure they know who is in charge of the project, who to contact in case of technical difficulties, and how to get help from teammates.



WHAT ARE OUR LEARNING PHILOSOPHIES? You offer unique products or services to distinct audiences. Make sure your new hire understands the nuances and your philosophy, your approach, and most importantly who you serve.

To save time and minimize rework, you can include most of this information in an SOP document that you can share with everyone on the team. Just make sure SOPs are updated as circumstances change. At the end of this guide, you'll find a template for an email you can send to your new hire that covers most of the information listed above.

4

ASSIGN A STARTER PROJECT

Expecting a new hire to immediately tackle a major project might be a recipe for disaster. It's like asking a student to write a thesis before taking the introductory courses. No matter how talented or skilled that student is, they're unlikely to excel in that situation.



A starter project can help you see how the new employee functions at work. It also gives them a low-stakes way to get to know your team and how they work together.

Starter projects are most valuable for everyone when you set clear expectations. The new hire should know their deadline and objectives. If they need to contact vendors or clients to do this work, make sure they have the contact information for all the relevant people. Check in regularly to see how things are going.

5

FOLLOW-UP

New hires may not always feel comfortable asking for help. They know how busy their teammates are and may not want to be a bother. This can lead to time wasted as they try to muddle through something without the right tools or information.

Short-circuit this pattern by reaching out to new hires part-way through their first project. Ideally they should be communicating with their mentor regularly, but an extra check-in from the HR representative, project manager, or team lead can make them feel like a valued part of the team.



6 GATHER FEEDBACK

To improve a course, you ask for feedback from learners and instructors. The same principle applies to improving your onboarding process. Reach out to new hires in the first few months get their feedback. Ask them what worked and where there is room to improve.

You might think you don't have time to provide all of this training. This person is a professional, can't they just figure it out on their own? The reality is, effective onboarding saves time in the long run. New hires don't have to scramble to find basic information. They won't waste time using the wrong tool or reaching out to the wrong person. Most importantly, it helps them feel like part of the team, and a cohesive team delivers the best work.



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ONBOARDING

Email Template

From: You@yourcompany.com

To: Newhire@theiremail.com

Subject: Welcome to the Team!

Dear [New Hire Name],

Welcome to the team! We know you're excited to get started and so are we. This email includes all the information you'll need to get oriented.

Your supervisor is [supervisor name]. Your first meeting with [him/her/them] is scheduled for [date,time] via [Zoom, Google Meet, etc.]. If you need to reach [him/her/them] in the meantime please [call/email + contact info]. During this meeting you'll learn a little more about how we work, go over basic expectations, and get a mentor assigned to you. Bring any questions you have about the [job/project].

After that, you'll be ready to meet with the rest of the team. That meeting is scheduled for [date,time] via [Zoom, Google Meet, etc.]. They're excited to meet you and ready to answer any questions you have about working together.

You'll use the following tools to do your work and interact with the team: [list communication, collaboration, and development tools.] Your supervisor will provide you with passwords and logins at your first meeting. If you have any technical issues, you can always reach out to [tech support person]. He/she/they will get you taken care of.

Please take some time to review the [attached/linked] SOPs before your first meeting with your supervisor. They will help you get oriented before you start your first assignment.

Welcome to the team. We're going to do great work together.

Best wishes,

[Your name]

[Your Title]

[Preferred contact info]

teamed 



ONBOARDING PLANNING

Checklist

New Hire Name:

Position:

- Supervisor Assigned
- Mentor Assigned
- SOPs sent
- Logins and passwords provided
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- First meeting with supervisor scheduled
- First meeting with team scheduled
- First task assigned
- First follow-up, midway through first task
- Second follow-up:, after first task complete
- Feedback on onboarding requested