DESIGN DOCUMENT: ONBOARDING FOR PRODUCT TEAM

PROJECT OVERVIEW

Orbis Education is the nation's leading manager of hybrid, accelerated degree programs specifically designed for fast-growing healthcare professions. The Product Team at Orbis Education are instructional designers, eLearning developers and eLearning administrators. The product team would like their existing onboarding program reviewed in order to determine ways it could be improved.

The purpose of an onboarding program is to provide the opportunity for new hires to develop the necessary skills, knowledge and behaviors to become an effective contributor to the organization (“Learn Employee Onboarding”, n.d.) A good onboarding program educates new employees about the organizational culture, growth and the best practices ("Learn Employee Onboarding", n.d.). By providing an engaging onboarding experience, new employees are prepared for long-term success and engagement on the job (“Learn Employee Onboarding”, n.d.).

INSTRUCTIONAL APPROACH

The instructional approach for this onboarding process is human performance technology. Human Performance Technology (HPT) improves productivity, competence, and provides a strategy for solving problems related to the performance of people (Human performance technology (HPT), n.d.). HPT allows for a number of possible interventions to improve performance (Surry & Stanfield, n.d.). Increasing productivity, competence and performance is the main goal of the onboarding process.

INSTRUCTIONAL GOAL

The instructional goal for the onboarding of Product Team is for new hires is to be onboarded quickly and effectively. Successful onboarding will help all new hires learn what the mission, vision, goals and priorities are of Orbis Education as well as the Product Team. Onboarding will introduce new hires to the Product Team Members as well as the leadership team. New employees will be encouraged to connect and engage with the team and understand what their performance expectations are and how to achieve them (Learn Employee Onboarding, n.d.).

MAIN STEPS TO ACHIEVE GOAL

There are four main components of the onboarding process:

1. IT/Facilities tasks to be completed
   a. System Setup Needs – New hires must have access to the systems and tools needed to perform their job.
   b. Orbis Accounts Setup – New hires must set up accounts in Orbis applications.
2. Training
   a. Learn about Orbis Education’s processes.
   b. Learn any new software or applications
3. Role/Individual tasks
a. Complete all required HR paperwork
b. Introduction of new hire to team
c. Discussion of performance goals and rubric
4. Meet with leadership to learn about culture, vision and values.

FRONT-END ANALYSIS

To gather data for the Performance and Learner Analysis, I interviewed 6 employees from the Product Team. The objectives for the interviews were to find the gaps in the existing onboarding process. From the interviews, themes were uncovered that identified gaps in the onboarding process. See Appendix A for the questions asked and Appendix B for the data collected from the interviews. Following the new hire interviews, I interviewed 4 managers to discuss their onboarding process. See Appendix C for the questions and Appendix D for the responses.

MAIN THEMES

 The checklist is a good tool. It was easy to follow and provides direction on what needs to be done. Most liked the paper version, but a few said it should be an electronic or an interactive document. One new hire was not aware it was available online.
 Some things can be removed, and some things should be optional. Interviews should be based on roles.
 Managers have personalized the checklists based on roles. Managers help the new hire go through the checklist by sitting down with them and going over the tasks that need to be completed.
 The list of required access and software does not include a description of what it’s used for and how to access help. When onboarding a new hire, some managers go through the checklist with the new hire and explains and demonstrates any new software. Some new hires had to figure out the answers on their own by asking fellow team members.
 Checklists can be improved by breaking it up into activities for day 1, week 2, etc., and checklist needs to be kept up to date.
 Managers create an agenda for the new hire scheduling what tasks need to be completed in the first week and sometimes the second week.
 If access and software was completed prior to the first day, the new hire needs to know what access and software has been granted or installed.
 While meetings with the leadership team were looked on favorably, the purpose of the meetings are not clear. There is inconsistency as to who is responsible for setting these meetings up. In some instances, the manager would set up the meetings. In other instances, the new hire was responsible for setting them up. When scheduling, the new hires did now know who they were required to meet with or why. Managers feel that not all of the meetings are necessary.

GAP ANALYSIS

The goal of the onboarding process is for new hires to become acquainted with the company as well as preparing for their job. The checklist should provide the direction and information needed to achieve the goal.

<table>
<thead>
<tr>
<th>Desired State</th>
<th>-</th>
<th>Actual State</th>
<th>=</th>
<th>Need</th>
</tr>
</thead>
</table>

2
The onboarding process provides clear direction for new hires on how to gain access to software and applications they need to perform their jobs.

- The process may include software/applications that the new hire may not need.
- New hire may not be clear on what the software/applications are for.
- The process for getting access to software/applications is inconsistent.

A clear and consistent process for getting access to software and applications is needed.

The onboarding process provides instruction and training on an as needed basis for software, applications and job specific tasks.

- Some instructions are in the checklist, but not all.
- If the new hire needs help, he/she must contact manager or team mates.
- If new hire is given a printed checklist, he/she cannot access instructions or training.

Provide consistent and easy to access instructions and training for all software, application or job specific tasks when needed.

The onboarding process provides new hires with a clear picture of what the mission, vision, goals and priorities are of Orbis Education. New hires receive an introduction to key leadership people based on their roles through one-on-one meetings.

- Each new hire complete the Orbis University Onboarding course in Bridge which provides them with an understanding for the mission, vision, goals and priorities of Orbis Education.
- New hires are not clear on what the meetings are for and sometimes find that the person they are meeting with isn’t clear either.
- The person responsible for scheduling the meetings is inconsistent.
- Not all interviews take place. They may be canceled or never scheduled.

A clear and consistent process for setting up the required meetings needs to be developed so that the new hires, managers and key leadership people all understand what the meetings are about.

Manager provides an agenda of activities that the new hire will complete.

- Not all managers are creating agendas.
- Some create them for one week and some for two weeks.
- The agenda can be overwhelming to the new hire.

Break the agenda into first day, first week, second week, first month and first 3 months activities.

**LEARNER ANALYSIS**

<table>
<thead>
<tr>
<th>Information Categories</th>
<th>Data Sources</th>
<th>Learner Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Entry Skills</td>
<td>Observation</td>
<td>Targeted learners are skilled instructional design, eLearning development. Software skills related to</td>
</tr>
</tbody>
</table>
these roles are required, such as Storyline, LMS, video conferencing and email. Other skills

<table>
<thead>
<tr>
<th>2. Prior knowledge of topics area</th>
<th>Interviews</th>
<th>83% were not clear on what some of the software and access was for or how to use it.</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Attitudes toward content</td>
<td>Interviews</td>
<td>All new hires liked using a checklist. They liked knowing what tasks they were to complete. They had a positive attitude that the onboarding process that allowed them to start working right away. While unclear exactly what the meetings with the leadership and other employees were about, they liked the face to face and found it helpful to meet people and get an idea of other’s roles.</td>
</tr>
<tr>
<td>4. Attitudes toward potential delivery system</td>
<td>Interviews</td>
<td>All participant liked the printed version of the checklist. 5 out of 6 participants like the idea of having an online, interactive version that could be checked off or comments could be made.</td>
</tr>
<tr>
<td>5. Motivation for instruction (ARCS)</td>
<td>Interviews</td>
<td>Onboarding is an important part of any new job. While motivation was not discussed during the interviews, the responses indicate that they are highly motivated and looking forward to getting access to software, learning about the company and getting started on their jobs.</td>
</tr>
<tr>
<td>6. Educational and ability levels</td>
<td>Interviews</td>
<td>Education level is unknown. Participant roles consist of: 1 eLearning Developer (ELD), 2 Instructional Designers (ID), 2 eLearning Product Administrators (ELPA) and 1 eLearning Support Administrator (ELSA).</td>
</tr>
<tr>
<td>7. General learning preferences</td>
<td>Interviews</td>
<td>For the onboarding, having a paper checklist allowed the user to view what needed to be done. However, most expressed a desire to have a way to electronically track the status of the onboarding tasks.</td>
</tr>
<tr>
<td>8. Attitudes toward training organization</td>
<td>Interviews</td>
<td>As new hires, participants were positive toward the onboarding as it pertained to their job.</td>
</tr>
<tr>
<td>9. General group characteristics a. Heterogeneity</td>
<td>Interviews</td>
<td>Learners who participated in the survey were 50% female and 50% male. All new hires for the Product Team will participate in the onboarding process. New hires were smart, friendly and competent individuals excited to do the work they were hired for.</td>
</tr>
<tr>
<td>b. Size</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Overall Impressions</td>
<td></td>
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</tr>
</tbody>
</table>
PERFORMANCE CONTEXT

The intrinsic value of the onboarding process will be to engage and involve new hires into the work culture of Orbis Education. Being able to complete the onboarding process, the new hires will feel comfortable in their new position and prepared for long-term success and engagement.

<table>
<thead>
<tr>
<th>Information Categories</th>
<th>Data Sources</th>
<th>Performance Site Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Managerial/supervisory support</td>
<td>Interviews</td>
<td>Manager support is important in the onboarding process. Level of manager involvement varies between managers. Onboarding provides intrinsic value for new hires that complete the onboarding process. They are more engaged and prepared for the job.</td>
</tr>
<tr>
<td>2. Physical aspects of site</td>
<td>Interviews</td>
<td><strong>Facilities:</strong> Onboarding requires the new hire has access to computer equipment, phone and workspace. <strong>Resources:</strong> The checklist provides tasks that the new hire is required to complete. If help is needed, new hire can reach out to their manager or a fellow team mate. <strong>Equipment:</strong> PC or Mac, Email <strong>Timing:</strong> Onboarding begins on the first day and continues for up to 3 months.</td>
</tr>
<tr>
<td>3. Social aspects of site</td>
<td>Interviews</td>
<td><strong>Supervision:</strong> New hires will be provided supervision as needed. Many of the items on the checklist can be self-completed. <strong>Interaction:</strong> New hires will work alone but can also interact with other team members and manager. <strong>Others using skills effectively:</strong> Members of the team have many of the same skills as the new hire.</td>
</tr>
<tr>
<td>4. Relevance of skills to workplace</td>
<td>Interviews</td>
<td><strong>Relevance:</strong> This is very relevant to their jobs.</td>
</tr>
</tbody>
</table>

PERFORMANCE OBJECTIVES

The main objective of the onboarding process is for new hires is to be onboarded quickly and effectively. In my interviews with the managers, there was consensus on the following objectives for the onboarding program:

1. To understand what the company’s mission, vision, strategic goals, and priorities are.
2. To make new hires feel comfortable, valued and good about joining the team.
3. To understand how their role fits into the scope of the company.
4. To understand their role and responsibilities and be able to achieve them.
An effective onboarding program will be one that is universal for all employees, then tailored for specific departments or roles (Dalto, 2015). Onboarding requires effort from different departments, such as HR, IT, Facilities and Training Department. These efforts need to be effectively coordinated, organized and completed on time (Dalto, 2015). Even before the new hire’s first day, it is important to engage and support him or her (Zaguri, n.d.). Sending the necessary HR forms along with a Welcome Packet can help the new hire feel less anxious about starting their new job (Zaguri, n.d.).

There are small steps that can help ease the new hire’s anxiety on the first day. Welcome them when they arrive, introduce them to their new team, provide an organization chart, take them to lunch and make sure their work station is ready for them (Mehl, 2018). Onboarding can be made more interactive by including gamification in the process (Mehl, 2018). Finally, an important component of the onboarding process is helping the new hire understand what will make them successful. This should be done sooner, rather than later. Mehl (2018) recommends discussing the goals of the department/teams and the new hire’s performance expectations starting on the first day.

In reviewing the current onboarding process, there are universal tasks that all new hires should participate in. Recommendations are to improve pre-boarding activities. Providing a welcome packet will make the new hire feel welcomed and ease any tension they may feel. All new hires should attend the meetings with Scott, Mark and Adam (see the revisions of checklists for ID, ELDA and ELPA in Appendix E). Interviews with the new hires indicated that these meetings were helpful. They provided insight into the mission, value and goals of the company as well as understanding their role. Scheduling meetings with other managers can also provide insight into the company and the new hire’s role. Adding a game to the onboarding process can make it more engaging and interesting (see Appendix F. Manager’s, as well as new hires, should have a checklist for onboarding (see Appendix G). Finally, providing a Contact list can help the new hire find the help they need (Appendix H).

### INSTRUCTIONAL STRATEGY

<table>
<thead>
<tr>
<th>Onboarding Schedule</th>
<th>Onboarding Process</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pre-boarding</strong></td>
<td>Manager/HR</td>
</tr>
<tr>
<td>□ Send the employee a welcome letter or welcome packet which includes information about the company and the job</td>
<td></td>
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<tr>
<td>□ Send HR and other legal/benefits-related paperwork</td>
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<td>□ Contact the new employee and ask if he/she has any outstanding questions</td>
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<tr>
<td>□ Schedule meetings with Produce Team leadership for new hire’s first week</td>
<td></td>
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<tr>
<td>□ Have all business process owners complete necessary tasks to prepare for new employee’s arrival</td>
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<tr>
<td>□ Ensure that Manager is present on the first day of work.</td>
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</tr>
<tr>
<td><strong>Facilities:</strong></td>
<td>□ Assign and prepare the work area including desk and chair</td>
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<tr>
<td>□ Phone</td>
<td></td>
</tr>
<tr>
<td>□ Office Supplies</td>
<td></td>
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<tr>
<td><strong>IT:</strong></td>
<td>□ Laptop □ Desktop</td>
</tr>
<tr>
<td>□ Monitor</td>
<td></td>
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<tr>
<td>□ Accessories</td>
<td></td>
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<tr>
<td>□ Set up workstation</td>
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<tr>
<td>First Day</td>
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<tr>
<td>-------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>☐ Welcome new hire to Orbis Education and provide a tour of the facilities (Manager)</td>
<td></td>
</tr>
<tr>
<td>☐ Team Introductions (Manager)</td>
<td></td>
</tr>
<tr>
<td>☐ Org Chart Overview (Manager)</td>
<td></td>
</tr>
<tr>
<td>☐ Show them their workspace, provide them access to the checklist and ensure the workstation set up is completed. (New Hire/Manager)</td>
<td></td>
</tr>
<tr>
<td>☐ Lunch with Team</td>
<td></td>
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<tr>
<td>☐ Return all forms to HR (New Hire)</td>
<td></td>
</tr>
<tr>
<td>☐ Human Resources Benefits Overview (HR)</td>
<td></td>
</tr>
<tr>
<td>☐ Complete the New Hire program in Bridge (New Hire)</td>
<td></td>
</tr>
<tr>
<td>• Orbisology – 45 minutes</td>
<td></td>
</tr>
<tr>
<td>• Complete FERPA course – 30 minutes</td>
<td></td>
</tr>
<tr>
<td>☐ Complete Day 1 role specific tasks on the Onboarding Checklist (New Hire)</td>
<td></td>
</tr>
<tr>
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<td>Welcome new hire to Orbis Education and provide a tour of the facilities (Manager)</td>
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<td></td>
<td>Lunch with Team</td>
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<td></td>
<td>Human Resources Benefits Overview (HR)</td>
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<tr>
<td></td>
<td>• Complete FERPA course – 30 minutes</td>
</tr>
<tr>
<td></td>
<td>Complete Day 1 role specific tasks on the Onboarding Checklist (New Hire)</td>
</tr>
<tr>
<td></td>
<td>First Week</td>
</tr>
<tr>
<td></td>
<td>☐ Complete Week 1 General Tasks on the Checklist (New Hire)</td>
</tr>
<tr>
<td></td>
<td>☐ Complete Orbis Education Intranet Scavenger Hunt (New Hire)</td>
</tr>
<tr>
<td></td>
<td>☐ Complete Job Preparation Tasks (New Hire, Manager)</td>
</tr>
<tr>
<td></td>
<td>☐ Attend Product Team Leadership Meetings (New Hire)</td>
</tr>
<tr>
<td></td>
<td>• Scott McCormick (30 minutes)</td>
</tr>
<tr>
<td></td>
<td>• Mark Gbur (90 minutes)</td>
</tr>
<tr>
<td></td>
<td>• Adam Parrish (30 minutes)</td>
</tr>
<tr>
<td></td>
<td>☐ Complete Week 1 Training (New Hire)</td>
</tr>
<tr>
<td></td>
<td>☐ Discuss Product Team Staffing Rubric and 2019 Goals (New Hire, Manager)</td>
</tr>
<tr>
<td></td>
<td>Within 2 Weeks</td>
</tr>
<tr>
<td></td>
<td>☐ Complete Week 2 General Tasks on the Checklist (New Hire)</td>
</tr>
<tr>
<td></td>
<td>☐ Complete Week 2 Job Preparation Tasks (New Hire, Manager)</td>
</tr>
<tr>
<td></td>
<td>☐ Schedule Product Team Meetings (New Hire)</td>
</tr>
<tr>
<td></td>
<td>• Joan Partenheimer (30 minutes)</td>
</tr>
<tr>
<td></td>
<td>• Jessica Gentry (30 minutes)</td>
</tr>
<tr>
<td></td>
<td>• Steve Whikehart (30 minutes)</td>
</tr>
<tr>
<td></td>
<td>• Jacob Ruh (30 minutes)</td>
</tr>
<tr>
<td></td>
<td>☐ Complete Week 2 Training (New Hire)</td>
</tr>
<tr>
<td></td>
<td>30 Days</td>
</tr>
<tr>
<td></td>
<td>☐ Complete the 30 day Job Preparation Tasks (New Hire, Manager)</td>
</tr>
<tr>
<td></td>
<td>☐ Schedule any Product Support meetings required for your role (New Hire)</td>
</tr>
<tr>
<td></td>
<td>• Amy Cook – Chi Tester (30 minutes)</td>
</tr>
<tr>
<td></td>
<td>• Leanne Abramo – Graphic Design and Multimedia (30-60 minutes)</td>
</tr>
<tr>
<td></td>
<td>• Dawn Knapp – Project Management (30-60 minutes)</td>
</tr>
<tr>
<td></td>
<td>• Amanda Poe – Faculty Development (30 minutes)</td>
</tr>
<tr>
<td></td>
<td>• Deb Highfill – Nursing Academic Roles (30 minutes)</td>
</tr>
<tr>
<td></td>
<td>• Schedule a visit at the Marian site</td>
</tr>
<tr>
<td></td>
<td>☐ Complete any 30 day Training (New Hire)</td>
</tr>
</tbody>
</table>

**ASSESSMENT PLAN**

To ensure that the onboarding is meeting the needs of the new hire, a quantitative survey below, can be used at key points during the onboarding process (Learn Employee Onboarding, n.d.). The questions below can help gauge how the new hire is performing.

**NEW HIRE ASSESSMENT**
<table>
<thead>
<tr>
<th>Onboarding Schedule</th>
<th>Assessment Tool</th>
<th>Assessment</th>
</tr>
</thead>
</table>
| First Day           | • Likert Scale | • The information I received before my arrival helped me settle in.  
|                     |                | • I knew where to report, who to see and felt welcomed on my arrival.  
|                     |                | • The introduction to the team and the organizational chart was helpful and informative.  
|                     |                | • After completing Orbisology and FERPA Training, I gained an understanding of the company’s goals, values and work health & safety requirements.  
|                     | • Questionnaire | • My workstation was set up with everything I needed to get started.  
|                     |                | • The checklist for Day 1 was clear and easy to follow.  
|                     | • One on One Session | • I was able to complete all the tasks for Day 1  
|                     |                | • Please list any tasks you were unable to successfully complete and the reason you weren’t able to complete them.  
|                     |                | • How is everything going so far?  
|                     |                | • What are some of the highlights of your first day?  
|                     |                | • What are some challenges you’ve encountered?  
| First Week          | • Likert Scale | • My new role was effectively explained, and I was able to start work without unnecessary delay.  
|                     |                | • I was informed of any training I was required to complete.  
|                     |                | • I understand my performance goals and team rubric.  
|                     |                | • I feel well-informed and comfortable in my role.  
|                     |                | • Meetings with the Product Team Leadership was a valuable and enjoyable experience.  
|                     |                | • The checklist for Day 1 was clear and easy to follow.  
|                     |                | • I was able to complete all the tasks for Week 1  
|                     |                | • Please list any tasks you were unable to successfully complete and the reason you weren’t able to complete them.  
|                     |                | • How is everything going so far?  
|                     |                | • What are some of the highlights of your first week?  
|                     |                | • What are some challenges you’ve encountered?  
|                     |                | • Please list any tasks you were unable to successfully complete and the reason you weren’t able to complete them.  

**DESIGN DOCUMENT FOR ORBIS EDUCATION**

<table>
<thead>
<tr>
<th>Questionnaire</th>
<th>Please list any tasks you were unable to successfully complete and the reason you weren’t able to complete them.</th>
</tr>
</thead>
<tbody>
<tr>
<td>One on One Session</td>
<td>Is there anything that you’re not clear about regarding the company or your role?</td>
</tr>
</tbody>
</table>

**Two Weeks**

<table>
<thead>
<tr>
<th>Likert Scale</th>
<th>Do you have everything you need to perform your work?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>What would help you do your job better?</td>
</tr>
<tr>
<td></td>
<td>I feel well-informed and comfortable in my role</td>
</tr>
</tbody>
</table>

**30 Days**

<table>
<thead>
<tr>
<th>Likert Scale</th>
<th>I understand my probation and performance management, development and review obligations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>I feel well-informed and comfortable in my role</td>
</tr>
<tr>
<td>One on One Session</td>
<td>Is there anything that you’re not clear about regarding the company or your role?</td>
</tr>
<tr>
<td></td>
<td>What would help you do your job better?</td>
</tr>
</tbody>
</table>

**KEY PERFORMANCE INDICATORS**

In addition to assessing the new hire, measuring Key Performance Indicators (KPIs) can be valuable in determining how successful the onboarding process is (Sullivan, 2015).

**Key Performance Indicators**

- Percent of new employees with all paperwork completed before day one
- Percent of new employees with “all necessary supplies” in place by day one
- Reported employee satisfaction with new employee orientation (day one)
- Reported employee satisfaction with new employee onboarding program (at 90 days and 1 year)
- New employee performance metrics (same as used for general employee performance evaluation)
- Attrition rate of new employees (Sullivan, 2015)
FORMATIVE EVALUATION PLAN

To conduct a formative evaluation of the modifications proposed in this design document, the following documents should be sent to the managers for their feedback and input.

- List of Objectives
- Manager’s Onboarding Checklist
- New Hire Onboarding Checklist for their team
- Contact List
- Scavenger Hunt Storyboard
- Formative Assessment Questionnaire
  - Do you agree with the objectives as they are listed?
  - Do you feel the order in which the checklist is laid out is effective?
  - Do you feel a Manager Checklist is necessary?
  - Do you feel the New Hire Assessments are appropriate?
  - Is there anything that you would like to see added?
  - Is there anything that needs to be removed?
References:


Objectives for the interviews: To find the gaps in the existing onboarding.

Checklist:
What worked well?
What can be improved?
What was missing?
Would you recommend a different way to deliver the information?
Was the onboarding schedule effective or should things have been presented at different times?
Were you familiar with the different software that was required for your position?
If not, how did you learn what they were used for?
Were you able to find training on how to use them?

Tools and Resources
What tools and resources worked well for you?
What could be better?
What tools and resources are needed?

Interviews
Within one month, you were to schedule meetings with various people. Did you know who the person was and what role they played?
Do you feel the meetings were of value?
Do you feel the meetings were too soon, not soon enough?
Do you feel that the meetings should have been spread out or scheduled at different times?
RESULTS OF INTERVIEWS

THEMES

- According to the interviews, the checklist is a good tool. Interviewees like the paper version and a few said it should be interactive or an electronic document.
- Checklist needs to be personalized based on role or project/partner.
- Software needs to be described as to what it’s for with access to help.
- Getting help is inconsistent. Some help is from managers or fellow team members and some from software contacts.
- While interviews were looked on favorably, there is inconsistency as to whether the manager sets up the meetings or the new hire.
- Purpose of the meetings are not clear and getting all the meetings set up can be a challenge.

PARTICIPANTS:

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<tr>
<th>Name</th>
<th>Role</th>
<th>Length of employment</th>
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<td>2 months</td>
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<tr>
<td>Interviewee 6</td>
<td>ID</td>
<td>4 months</td>
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COMMENTS FROM INTERVIEWEES

CHECKLIST

1. Reaction to the checklist

Interviewee 1
Did not use the ELD checklist. Wasn’t as extensive as this ELD checklist.
The checklist worked well.
Nice to have something to follow.
It’s straightforward.
Nothing really missing.
Didn’t feel pressure to get things done, but they were quick and easy.

Interviewee 2
Organized.
You knew what to do.
Provided contacts.
She went through the first two weeks’ worth of tasks in 3 days.
In previous jobs, she would spend 2 weeks in front of a computer screen.
Instead, she was able to start working right away which she liked.

**Interviewee 3**
Checklist gave him things to do independently.
Liked the scheduling aspect of the checklist and having a contact person for every item.

**Interviewee 4**
She liked the checklist and how it was laid out.
It was very clear on what you needed to do.

**Interviewee 5**
She was given the ELPA checklist.
Helped her know what needed to be done.
Used printed and online versions.

**Interviewee 6**
Gave him things to focus on to get his computer up and running.
Good, slow introduction.
Was given time to get it down and people to answer questions.
He used both the online and paper versions of the checklist.
When he started, he had an email with the checklist attached and a link to the document. Without that link, he doesn’t know where the document is.
He used the paper version to mark.
He rushed through. Done in plenty of time.
He was given ample time to do the checklist.
Given full days to work on it.
He wasn’t working on a project or partner.

2. Ways it could be improved

**Interviewee 1**
Some things on the list weren’t important or couldn’t be done.
Make them specific/personalized.
The checklist he got came in a packet as a printout. Didn’t know it was available online and doesn’t know where to get it.
Liked the physical copy but would like to see it online.

**Interviewee 2**
Not everything on the list applies to her job. She found it interesting to look at the other things, however.
May be helpful to identify what is particular for ID and ELD.
An online version of the checklist would be helpful. That would allow her to check off what she has completed.
It would also be great to have the ability to keep notes, especially if she was not able to get something done. She could indicate that IT was working on something, etc.
With the current checklist, she would highlight what she couldn’t get done.

**Interviewee 3**
Wasn’t familiar with a lot of the software.
Improvement would be to have a short description in the list.

**Interviewee 4**
When viewing the checklist online, the links were great, but once you printed it off, the links were worthless. An improvement would be to make this an electronic document. Structure needs to be improved. It should be online and interactive and the manager able to review the new hire’s progress.

**Interviewee 5**
Not much. Nothing was missing.
Liked both options – print out and online.

**Interviewee 6**
Overwhelming. The checklist is thorough, but too thorough – Things weren’t always relevant. For example: he was told to look through folders in Box to know what is there. There are thousands of documents. Didn’t know which ones to focus on. Too difficult to go through all of them. He only uses 6-7 folders on a regular basis.

**TOOLS AND RESOURCES**

**Interviewee 1**
Didn’t know what a lot of the software was for.
He did a walk through with his manager.
- Box was on his computer when he opened it.
- He was provided everything he needed for box before he started.
- Got familiar with Bridge quickly, 1st day or 2.
- Stride – never uses.

He found out after a couple of months that he could expense his phone. He didn’t know that and did not see that anywhere. Not mentioned in the benefits. Someone told him.

**Interviewee 2**
Manager helped explain what things were for and helped make sure she had access.
Manager explained the software. Might be helpful to add a description.
She also asked her manager how to use any software she wasn’t familiar with though most were easy to learn.
- Had to request Adobe CC. Specific for her job.
- No longer using stride, using river.
- Not using dropbox.

**Interviewee 3**
Learned software by poking around. Manager was a great source.
- Canvas – worked well
- LMS – Useful
- Needed access to a sandbox in canvas. Had to ask. He was given a basic assignment to produce and needed a sandbox.

**Interviewee 4**
As far as knowing what the different software was, she felt that that would depend on if you are a seasoned IDer as opposed to someone just out of college or new to the field.
Need to describe the tool and be able to access training when needed.
The tasks for full time are doable in the time frame given.
The first week is all about access which is important.
Some of the software is for contractors only and some are for employees only.
Tasks and timing should be based the persons role and what project they have been hired to work on.
To get access, it is necessary to contact each person listed. If you don’t know what the tool is, you can get help through the contact.

- Blue jeans – easy to use
- Box – having issues
- Trello – not using the tool as much
- Smartsheets – could be clearer
- LOR and Articles – for ELD only
- FireZilla – for transferring large files. Not many people need this.

**Interviewee 5**
She was sent links to videos on how to use the software from her manager. Manager helped train her. Everyone was willing to help. Has used most of the tools before. Didn’t feel it was overwhelming.

**Interviewee 6**
Didn’t know what they were for. Did not have full context of why he was using them or how it was supposed to be used in his job. He would ask someone. If he needed training, he had to ask. Nothing was too difficult to learn. Most of his access was done before he started. 80% Didn’t know what he had access to till he tried. No notification of when he had access or how to access certain things. Others he had to reach out and request.

- Box – Use daily
- Survey Monkey – never got access or needed it
- Canvas – Uses on a regular basis
- LOR – Helpful, but not intuitive to use. Doesn’t work well. Keyword search doesn’t work. Search by name doesn’t work.
- Wish he had access to Adobe Acrobat pro for making quick edits.

**INTERVIEWS**

**Interviewee 1**
His first week, his manager was out of the office. First 4 Interviews were already scheduled for him when he started. Met for chi testing. Did not meet with Jessica, Leanne, Dawn or Erika. Met with teams on product side. Wasn’t clear why he was meeting these people. Met them face to face. Information was good to know. He learned their perspective. Did all the interviews in one week.

**Interviewee 2**
She had meetings with 3 people that were already scheduled for her when she started. The purpose was unclear, but they were informal, so it helped her be more comfortable. The people she met with were not the ones listed on the “Within one month”. She did not schedule any of those meetings but have met them through the monthly product team meetings. She doesn’t interact directly with these people so not sure why should would meet with them.
Would be intimidated to set up meetings with them herself. If someone else did it, then, of course, she would attend.

**Interviewee 3**
Did 4-5 interviews.
Set up by manager
HR set up the meeting with the CEO – 2nd week
Met with product department
Liked the face to face
Meeting with Mark was a good way to start.
Never did some of the meetings. He learned on the job.

**Interviewee 4**
When she became a full time employee, she began scheduling the interviews right away. However, depending on the person, it may be a month or more before the interview takes place.
She did her own scheduling.
She researched who the people were using the employee gallery to learn who they were.
Her goal was to continue those relationships after the interviews. It helps them know who you are.

**Interviewee 5**
Had meetings in first month.
Shadowed others.
She set up some herself.

**Interviewee 6**
Did all but 1. Didn’t get a reply.
He set them up himself.
Had no idea who they were except for Scott and Mark.
Only one got pushed back.
Reached out within the time frame indicated on checklist.
Scheduled within 2nd week. Worked for a month and then met.
Meetings are brief, 30 minutes.
Not overwhelming.
Would get them set up but didn’t know what the meetings were for. No agenda.
Some of the people he met with didn’t have an idea of what the meeting was for, what to talk about, what the purpose was.
It was helpful to know when his job ends, and they pick it up.

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**FINAL COMMENTS**

**Interviewee 1**
Having lots of hands-on worked for him.
Not a lot of documentation to complete.

**Interviewee 4**
As a contractor, she had a condensed version of the onboarding.
There was software that she was not allowed to access such as Trello, Storyline, Blue Jeans, and Box.
Who is the audience for the checklist?
Think through the time frame based on what the person will be assigned.
Personalize based on role and project

**Interviewee 5**
The bridge course was helpful. 
First were days were devoted to onboarding 

**Interviewee 6**
Like drinking from a firehose.
Prefer that to no onboarding.
Best part of the onboarding was the shadowing. He could take notes and listen with no pressure.
Beth made a day by day schedule for him to meet with someone and shadow them.
QUESTIONS FOR MANAGER INTERVIEWS

GENERAL
Is there any pre-boarding activities?
How is the new hire introduced to the team?
What is your process for onboarding a new hire?

CHECKLIST
What is your opinion of the checklist?
What worked well? What can be improved? What was missing?
Would you recommend a different way to deliver the information?
Was the onboarding schedule effective or should things have been presented at different times?
When the new hire is unfamiliar with some of the applications or software on the checklist, how does he or she get help?

TOOLS AND RESOURCES
Does the checklist adequately list the software and application the new hire in your area will need?
Are there tools and resources that are needed but not on the checklist?

INTERVIEWS
Within one month, new hires are to meet with various people. How are these meetings set up?
How does the new hire know who they are meeting with?
Do you feel the meetings are valuable?
Do you feel the meetings are too soon, not soon enough?
Do you feel that the meetings should be spread out or scheduled at different times?

GENERAL
What do you feel the objectives to the onboarding is?
What do you expect the new hire to do once they’ve completed onboarding?
RESULTS OF MANAGER INTERVIEWS

THEMES

- Managers create an agenda for the new hire listing what tasks need to be completed in the first week and sometimes the second week.
- The managers utilize the checklist by sitting down with the new hire and going over the tasks that need to be completed.
- Checklists can be improved by breaking it up into activities for day 1, week 2, etc.
- Checklist needs to be kept up to date.
- Checklist are personalized based on role.
- The checklist may be a bit overwhelming, but it’s very comprehensive. However, somethings can be removed, and somethings should be optional. Interviews should be based on roles. Not all roles need to meet about nursing.
- While meetings with leadership were looked on favorably, the managers feel that not all of the meetings are necessary.
- Managers’ Objectives:
  - Understand what Orbis is, what we do and what the future holds
  - Make new hires feel comfortable and good about joining the team
  - Demonstrate how their role fits in the scope of the company.
  - Understand their role and responsibilities and be able to take them on.

COMMENTS FROM MANAGERS

ONBOARDING PROCESS

Manager 1
Preparring – 2 weeks ahead
Intro to the team
Will sit with them
Walks new hire around to meet people
30 minute meetings that the manager sets up
Uses a 2 week agenda
Gets laptop
Goes through all software
Doesn’t have a checklist
Meets with them in a conference room and bookmarks key URLs. Also introduces the password manager.
Takes about an hour.

Manager 2
No pre-boarding other than HR
Created an agenda for the first week.
Has a specific checklist for ELDAs.
Goes through the checklist sitting next to them and tells them what and why of each software/access.
Tells them what everything is.
Meets members of the team
Uses conference room to go over checklist.
HR approves the checklists.
Lunch as a group

**Manager 3**
Pre-boarding – no
Sends email to new hire with agenda, where to go for the first day and what time to arrive.
Gives new hire a two week agenda.
Completing checklist, set up address
Introduced to the EPA team
Team lunch
Checklist works well overall
Provided the new hire autonomy
If they need help, manager is nearby.

**Manager 4**
Pre-boarding - Formal HR
Has not onboarded anyone. Does part of the onboarding, but not all of it.
Manager walks the person around. Works with the new hire one on one.
Spend time with the direct manager
In the afternoon, sets up meetings with other folks on product team. No agenda for meeting.
A lot of shadowing
HR Onboarding
Check list for each role

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**WAYS IT COULD BE IMPROVED**

**Manager 1**
Didn’t say anything

**Manager 2**
Breaking it up into activities for day 1, week 2, etc.

**Manager 3**
Needs updating

**Manager 4**
Great that we have it. New hire doesn’t have to wait for something to do.
A lot is outdated. – Free conference call is gone. Stride
It may be a bit overwhelming, but it’s very comprehensive.
Somethings can be removed, and somethings should be optional.
Interviews should be based on roles. Not all roles need to meet about nursing.

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**INTERVIEWS**

**Manager 1**
Schedules meeting.
The sooner they know, they have better idea of who they are.
Helps them know who to go to with questions.
Mark does a 1 ½ presentation.
Manager 2  
Doesn’t need to meet with everyone  
Doesn’t meet with Mark or Scott. If they want to meet with them, the new hire can schedule the meeting.

Manager 3  
Meetings are already set up.  
1st week meetings - important

Manager 4  
The timing - depends on the role. Generally it works well. Important things are up front. Less important things are listed later.  
Meetings are valuable  
Don’t want to lose accessibility to higher ups.  
Have rubric for each role.  
Rubric is tied to goals  
Rubric or scorecard – Need to have discussions  
Practically everything is tied to the rubric

OBJECTIVES

Manager 1  
1st 2 weeks are structured.  
Get an idea of what Orbis is, what we do, what we’re doing.  
Make them feel comfortable.  
Does not have a rubric.  
Performance is task based.  
Hired knowing what is expected of them.

Manager 2  
Understand what the role is in the greater organization. Where they fit in.  
Anticipate it takes 3 months to get a new hire up and running.

Manager 3  
Learning who the key players are  
getting baseline for the role itself

Manager 4  
How their role fits in the scope of the company  
Get person comfortable and feel good about joining the team  
Sets tone for what we do is meaningful.
HARDWARE
The following items should be provided with you upon your start. If you are missing any items, please let Joan know.
- Computer
- Monitor
- Keyboard
- Mouse/mouse pad
- Phone
- Basic office supplies

SOFTWARE/APPS
You should have access to the following software/apps. If you do not have access to any of these items, please let Steve know.
- Box – Document Storage (with access to Orbis shared folders) – Chris Sweets (chris.sweets@orbiseducation.com) or Orbis Helpdesk (orbishelpdesk@orbiseducation.com)
- Bridge – Corporate LMS – Jennifer Heiskel (jennifer.heiskel@orbiseducation.com for support) for Orbis University and FERPA training
- Learning object repository (LOR) – Roger Morgan (roger.morgan@orbiseducation.com)
- Orbis Canvas - LMS
- Revive / Rejuvenate - Melissa Barker (Melissa.Barker@orbiseducation.com)

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<td>□ Get the team conference call number from Joan Partenheimer</td>
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<td>□ Follow these instructions to install FireFTP on Firefox (contact Roger Morgan at <a href="mailto:roger.morgan@orbiseducation.com">roger.morgan@orbiseducation.com</a> or Jessica Gentry at <a href="mailto:jessica.gentry@orbiseducation.com">jessica.gentry@orbiseducation.com</a> with questions)</td>
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- Create a free [Join Me](https://www.join.me/orbiseducation) account with your Orbis email address
  - Note: We also have an Orbis account for any meetings with over 8 participants
  - URL to view screen: [https://www.join.me/orbiseducation](https://www.join.me/orbiseducation)
  - Login: Contact Mark Gbur for login information

- [FireZilla](http://intranet.orbiseducation.com/faculty_presentations.cfm)

### General
- Facilities Tour
- Meet the Team with Manager
- Org Chart Review with Manager
- Set up workspace
- Return all necessary forms to HR
- Human Resources Benefits Overview

### Training
- Complete the new hire program in Bridge
- Complete the Orbisology onboarding course in Bridge (45 minutes)
- Complete the FERPA course in Bridge (30 minutes)

### Week 1

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• You must include your cell phone number on your cards when being reimbursed for your cell phone
• Order minimum number on the form

☐ Import Bookmarks to Google Chrome and review the purpose of each website
☐ Complete the Orbis Education intranet Scavenger Hunt:
  • Read the most recent news articles
  • Find the employee directory where you can access people’s contact information
  • Look at the employee gallery
  • Review the “Human Resources” tab for pertinent information
  • Scan the documents that are available on the intranet (expense forms and HR forms)
  • Read the “Partners” tab (be sure to scroll using the scroll bar on the right and in the middle)

☐ You may choose to tour the gym in the Penn Mark II building (contact info to schedule tour is below)
Justin Fuller | Assistant Real Estate Manager
CBRE | Asset Services
101 West Washington Street, Suite 1000
Indianapolis, IN 46204
T + 317 269 1051 | F + 317 637 4404 l
Justin.Fuller@cbre.com | www.cbre.com

Interviews
☐ Attend a 30 minute meeting with Scott McCormick, Chief Product Officer (CPO) (scott.mccormick@orbiseducation.com) to learn more about his role as Chief Program Officer at Orbis

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Interviews
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Barbara K. Howrey, Intern  
DESIGN DOCUMENT FOR ORBIS EDUCATION

- Oversees the entire Product Team, including online course development, delivery, training and support services for all programs and partners
- Responsible for all new product development activities
- Scheduling may require this be within the first 2 weeks
- Prepare some questions for him
- Attend a 90 minute meeting with Mark Gbur, Executive Director of Product and E-Learning (mark.gbur@orbiseducation.com) to learn more about Orbis and his role
- The Executive Director of Product and E-Learning.
- Manages multiple groups of the Product Team including Implementation, Systems Administration, and Multimedia Development.
- Attend a 30 minute meeting with Adam Parrish, Sr. Manager, E-Learning Implementation (adam.parrish@orbiseducation.com) to learn more about his role at Orbis
  - Manages the Implementation and Product Support teams

<table>
<thead>
<tr>
<th>Job Preparation</th>
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<tbody>
<tr>
<td>Set Up Trello Account</td>
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<td>Alert Leanne Abramo (<a href="mailto:leanne.abramo@orbiseducation.com">leanne.abramo@orbiseducation.com</a>) that your account has been created to request access to the Graphic and Multimedia Design Board (where we may request smaller projects from the graphic design team)</td>
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Alert Jessica Gentry (Jessica.gentry@orbiseducation.com) that your account has been created to request access to the ELD Team Board (where people can request projects from the E-Learning Development Team)

- Familiarize yourself with Ryver (communication tool)
- Familiarize yourself with the Product team folder and subfolders on Box
- Review the Product Team Org Chart
- Make sure you get added to all appropriate meetings/calls for any assigned projects (work with Beth Bruner to determine which meetings are appropriate)
- Create a Smartsheet account and request access to relevant Smartsheets from Beth Bruner
  - You will be able to view and modify existing sheets that have been shared with you
  - You will be able to create new sheets for only 30 days of the free trial, but will not have access to them after the 30 day free trial – do not use this account to create new sheets
  - If you need a new sheet for a project, please contact Beth Bruner to get a new sheet created and shared with you
  - Ask to be added to the following sheets: Learning Object Review, any partner-specific sheets if you’re assigned a project – Beth Bruner (beth.brunner@orbiseducation.com)

Alert Jessica Gentry (Jessica.gentry@orbiseducation.com) that your account has been created to request access to the ELD Team Board (where people can request projects from the E-Learning Development Team)

- Familiarize yourself with Ryver (communication tool)
- Familiarize yourself with the Product team folder and subfolders on Box
- Make sure you get added to all appropriate meetings/calls for any assigned projects (work with Jessica to determine which meetings are appropriate)
- Create a Smartsheet account and request access to relevant Smartsheets from Jessica Gentry
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  - Ask Jessica to show you how to complete the Time Allocation Form

Alert Jessica Gentry (Jessica.gentry@orbiseducation.com) that your account has been created to request access to the ELD Team Board (where people can request projects from the E-Learning Development Team)

- Review the ELPA guidelines
- Establish work hours with Joan Partenheimer
- Share your Outlook calendar with Joan Partenheimer
- Make sure you get added to all appropriate meetings/calls for any assigned projects (work with Joan Partenheimer to determine which meetings are appropriate)
- Create a Smartsheet account and request access to relevant Smartsheets from Joan Partenheimer
  - You will be able to view and modify existing sheets that have been shared with you
  - You will be able to create new sheets for only 30 days of the free trial, but will not have access to them after the 30 day free trial – do not use this account to create new sheets
  - Ask Joan to show you how to complete the Time Allocation Form
  - Ticket Submission

- Set up bi-weekly 1:1 meeting with Joan Partenheimer
Review the **ELD training course** on Canvas (contact Beth Bruner to request to be enrolled if you do not have access)

- **Canvas** (enroll in the following courses:
  - ELD Training Course
  - Demo Courses,
  - Faculty Community Course Template,
  - Student Resources Course Template – Beth Bruner
    ([beth.brunner@orbiseducation.com](mailto:beth.brunner@orbiseducation.com))

**Performance**

- Read the **product team staffing rubrics** (scorecards) to get a sense of your own position and other positions on the E-Learning team.
- Read the **2019 Goals** in detail and collaborate with Beth Bruner to create your individual goals for the year in the **Revive** system. Get a goals poster from Melissa Barker for your desk.

**Within 2 weeks of start date**

**General**

- Complete **intranet profile information** and send to Jasmine Shaffer
  ([jasmine.shaffer@orbiseducation.com](mailto:jasmine.shaffer@orbiseducation.com))
  - Bio should 100 words with job title, description, accounts you manage and anything additional to include about self
- Send headshot to Leanne Abramo
  ([leanne.abramo@orbiseducation.com](mailto:leanne.abramo@orbiseducation.com)) – contact Leanne for more information regarding specs of images
  - Picture should be color, 100 x 100 pixels, horizontal from shoulders up

**Performance**

- Read the **product team staffing rubrics** (scorecards) to get a sense of your own position and other positions on the E-Learning team.
- Read the **2019 Goals** in detail and collaborate with Jessica to create your individual goals for the year in the **Revive** system. Get a goals poster from Melissa Barker for your desk.

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  - Bio should 100 words with job title, description, accounts you manage and anything additional to include about self
- Send headshot to Leanne Abramo
  ([leanne.abramo@orbiseducation.com](mailto:leanne.abramo@orbiseducation.com)) – contact Leanne for more information regarding specs of images
  - Picture should be color, 100 x 100 pixels, horizontal from shoulders up

**Complete the **ELPA On-Boarding Course** in Bridge**
<table>
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<td>• Peruse the Style Guide and review the various page design options that are available.</td>
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<td>• Schedule and complete a day-long shadow of an ELPA for each LMS: Canvas, Blackboard and Sakai.</td>
</tr>
</tbody>
</table>
- **Read the online course development process** document in detail, and review all templates that are linked in the document.
- **Review the module outline template**, which is used for IDs to write out the course structure for ELDs to use to transfer the content into the LMS.
- **Peruse past discussions in the ELD team training course** (follow directions below to receive notifications about new posts; you must complete both steps to receive notifications):
  - Update notification preferences in Orbis instance of Canvas to receive notifications immediately for new discussion posts.
  - Subscribe to the ELD team “Process, Procedure, and Templates” forum at the very least.
- **Review the Storyline Help page** for tips and tricks about using Storyline.
- **Read the curriculum implementation work package guide** and review all templates that are linked in the document (ID-specific; lower priority for ELD).
- **Review the learning object repository (LOR)** and have a basic knowledge of the types of activities that are available for use for our partners (contact Roger Morgan for login information).
- **Watch the Asset Request Process overview**.

### Within 1 month of start date

<table>
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<td>- Review the student success course template, faculty community course template,</td>
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</table>
specific chapters of interest in *E-Learning and the Science of Instruction*  
- Beth Bruner ([beth.bruner@orbiseducation.com](mailto:beth.bruner@orbiseducation.com)) can provide hard copy access or Scott McCormick ([scott.mccormick@orbiseducation.com](mailto:scott.mccormick@orbiseducation.com)) can lend a Kindle version  
- Focus on chapters 2, 3, 4, 5, 6, 7, 8, 10, and 16 (from the second edition)  
- Sit in on a SME meeting with Sara Reifel and/or Beth Bruner  
- Build at least one module of a course on Canvas  
- Create at least one Storyline lecture or activity for a partner or internal project  
- Review the [student resources course template](mailto:studentresourcescourse@orbiseducation.com) and [faculty community course template](mailto:facultycommunitycourse@orbiseducation.com) in the Orbis instance of Canvas, and any of these types of courses that have been created for your assigned partners  

**Interviews – Product Support**  
- Schedule a 30 minute meeting with Amy Cook ([amy.cook@orbiseducation.com](mailto:amy.cook@orbiseducation.com)) to learn more about Chi Tester (online testing platform) and the E-Learning Program Administrator role at Orbis  
- Schedule a 30 – 60 minute meeting with LeanneAbramo ([leanne.abramo@orbiseducation.com](mailto:leanne.abramo@orbiseducation.com)) for an overview of how to work with her for graphic design and [student resources course template](mailto:studentresourcescourse@orbiseducation.com) in the Orbis instance of Canvas, and any of these types of courses that have been created for your assigned partners  

**Interviews – Product Support**  
- Schedule some time to visit the Marian site with the Marian E-Learning Program Administrator (or another instructional designer)  

**Interviews – Product Support**  
- Schedule a 30 minute meeting with Amanda Poe ([amanda.poe@orbiseducation.com](mailto:amanda.poe@orbiseducation.com)) to go over her role and what the Training and Development team provides  
- Schedule a 30 minute meeting with Deb Highfill ([deborah.highfill@orbiseducation.com](mailto:deborah.highfill@orbiseducation.com)) to learn more about the RVP and DNAS roles at Orbis
design needs and information about working with the multimedia team:
- Project request forms
- Storyline templates
- Requesting images from Leanne

☐ Schedule a 30 – 60 minute meeting with Dawn Knapp (dawn.knapp@orbiseducation.com) or Erika Purlee (erika.purlee@orbiseducation.com) to cover the following:
  - General project management at Orbis
  - Project scope and timelines of assignment projects
  - Project management templates, forms, folder structures on Box
  - Next steps for assigned projects

☐ Schedule a meeting with Amanda Poe (amanda.poe@orbiseducation.com) to learn about faculty development initiatives at Orbis Education

☐ Schedule a 30 minute meeting with Deb Highfill (deborah.highfill@orbiseducation.com) to learn more about the various nursing academic roles at Orbis

☐ Schedule some time to visit the Marian site with the Marian E-Learning Program Administrator (or another instructional designer)

<table>
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<td>☐ Review the chi-tester tutorials (contact amy.cook@orbiseducation with questions)</td>
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<tr>
<td>☐ Review the executive demo site for exemplary learning objects and presentations.</td>
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<td>☐ Review the chi-tester tutorials (contact amy.cook@orbiseducation with questions)</td>
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<tr>
<td>☐ Review the Product Team Training and Resources course and all of the resources included in it.</td>
</tr>
</tbody>
</table>

☐ Schedule a 30 minute meeting with Chris Sweets (chris.sweets@orbiseducation.com) to learn more about the Systems Admin role

☐ Schedule a 30 minute meeting with Roger Morgan (roger.morgan@orbiseducation.com) to learn more about the Multimedia Team

☐ Schedule a visit the Marian site with the Marian E-Learning Program Administrator
<table>
<thead>
<tr>
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<td>□ SurveyMonkey – Mark Gbur (<a href="mailto:mark.gbur@orbiseducation.com">mark.gbur@orbiseducation.com</a>) for login information</td>
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Appendix F

Scavenger Hunt Storyboard – Orbis Education Intranet

Free Template from E-Learning Heros
Working demo | Storyline file

Opening Screen

Welcome Screen

Welcome, %Learner% to the Explore Scavenger Hunt!
The scavenger hunt will require you to find the answers to 20 questions which are based on the content from the Orbis Education Intranet.
Click the Play button below when you are ready to begin!
Level 1 - Question 1

Question 1: What is the name of the most recent news article?
Level 1 - Question 2

Question 2: What is the name of the news article from January 18, 2019?

Level 1 - Question 3

Question 3: What is the name of the most recent article about Scott McCormick?
Level 1 - Question 4

Question 4: Add a 4th question here.

Level 1 - Question 5

Question 5: Add a 5th question here.
Level Complete Screen

![Level Complete Screen Image]

Leaderboard Screen

![Leaderboard Screen Image]
Level 2 – Question 1

**EXPLORE Scavenger Hunt!**
Level 2 Question 1 of 5

Question 1: How many employees are there in the employee gallery?

Incorrect Incorrect Correct Incorrect

Exit Screen

Click OK to exit the Explore: Scavenger Hunt.
Manager Onboarding Checklist

Pre-boarding
☐ Send the employee a welcome letter or welcome packet
☐ Send HR and other legal/benefits-related paperwork
☐ Contact the new employee and ask if he/she has any outstanding questions
☐ Schedule meetings with Product Team leadership
☐ Have all business process owners complete necessary tasks to prepare for new employee's arrival

Facilities:
☐ Work area including desk and chair
☐ Phone
☐ Office Supplies

IT:
☐ Laptop  ☐ Desktop
☐ Monitor
☐ Accessories
☐ Set up workstation

First Day
☐ Welcome new hire to Orbis Education and provide a tour of the facilities
☐ Team Introductions (Manager)
☐ Org Chart Overview (Manager)
☐ Show them their workspace, provide them access to the checklist and ensure the workstation set up is completed.
☐ Team Lunch
☐ Review New Hire checklist
☐ Assess/KPIs

First Week
☐ Work with New Hire to complete Week 1 tasks on checklist
☐ Meet with new hire to discuss Product Team Staffing Rubric and 2019 Goals
☐ Assess/KPIs

Within 2 weeks
☐ Work with New Hire to complete Week 2 tasks on checklist
☐ Assess/KPIs

30 Days
☐ Work with New Hire to complete Week 2 tasks on checklist
☐ Assess/KPIs
APPENDIX H

Contacts

Blue Jeans – Kat Schwoerer (Kathryn.Schwoerer@orbiseducation.com)
Box – Chris Sweet (chris.sweets@orbiseducation.com)
Bridge – Jennifer Heiskel (jennifer.heiskel@orbiseducation.com)
Business Cards – Kat Schwoerer (Kathryn.Schwoerer@orbiseducation.com)
Canvas - Beth Bruner (beth.bruner@orbiseducation.com)
Cell Phone Reimbursement - Joan Partenheimer (joan.partenheimer@orbiseducation.com)
Chief Product Officer (CPO) - Scott McCormick (scott.mccormick@orbiseducation.com)
Chi-Tester - Amy Cook (amy.cook@orbiseducation.com)
Conference Calls – Kat Schwoerer (Kathryn.Schwoerer@orbiseducation.com)
Dropbox – Chris Sweet (chris.sweets@orbiseducation.com)
E-learning Developer Administrator - Jessica Gentry (jessica.gentry@orbiseducation.com)
E-learning Program Administrator - Joan Partenheimer (joan.partenheimer@orbiseducation.com)
E-learning Support Administrator - Jacob Ruh (jacob.ru@orbiseducation.com)
Email – Chris Sweet (chris.sweets@orbiseducation.com)
Executive Director of Product and E-Learning – Mark Gbur (mark.gbur@orbiseducation.com)
Faculty Development - Amanda Poe (amanda.poe@orbiseducation.com)
FireFTP – Roger Morgan (roger.morgan@orbiseducation.com)
FireFTP – Jessica Gentry (jessica.gentry@orbiseducation.com)
Graphic Design - Leanne Abramo (leanne.abramo@orbiseducation.com)
Instructional Design Administrator - Steve Whikehart (steve.whikehart@orbieducation.com)
Intranet Profile Information - Jasmine Shaffer (jasmine.shaffer@orbiseducation.com)
Intranet Profile Photo - Leanne Abramo (leanne.abramo@orbiseducation.com)
JoinMe - Mark Gbur (mark.gbur@orbiseducation.com)
LOR – Roger Morgan (roger.morgan@orbiseducation.com)
Nursing Academic Roles - Deb Highfill (deborah.highfill@orbiseducation.com)
Partner Accounts/Resources – Beth Bruner (beth.bruner@orbiseducation.com)
Project Management - Dawn Knapp (dawn.knapp@orbiseducation.com)
Project Management - Erika Purlee (erika.purlee@orbiseducation.com)
Revive – Melissa Barker (Melissa.Barker@orbiseducation.com)
Rejuvenate - Melissa Barker (Melissa.Barker@orbiseducation.com)
Ryver – Orbis Help Desk (orbishelpdesk@orbiseducation.com)
Senior Manager, E-Learning Implementation – Adam Parrish (adam.parrish@orbiseducation.com)
SmartSheet Accounts – Beth Bruner (beth.bruner@orbiseducation.com)
Storyline 3 – Chris Sweet (chris.sweets@orbiseducation.com)
SurveyMonkey – Mark Gbur (mark.gbur@orbiseducation.com)
Trello - Leanne Abramo (leanne.abramo@orbiseducation.com)