Maintaining Momentum
Empowering New Staff Members
RX24 Takeaway

Thank you for participating in this session. I hope there are insights you can bring back to enhance your team's core onboarding process and establish Rock as a central hub for your organizational onboarding tools. There is so much more than can be done beyond what we have implemented but getting the basics in has been a game changer.

I have provided the very basic Word.docs we use for our Staff Rock Training Sheet and our New Hire Sheet. I have saved them here as PDF, but if you would like the Word version, please just email me, kelly.day@lifemission.church.

<u>Staff Rock Training Sheet</u>
This sheet accompanies my systems training when presenting Rock to a new staff member. I have found immediate hands-on learning overcomes anxiety and builds some context for the rest of their Rock training.

1. **Before you meet with your new hire:** Look to see if they already have a church account, if they do, make note of their username and give them the applicable permissions needed to jump in and start driving around (likely Staff Workers is all they will need to get started).
2. **While meeting with your new hire:**
   Give a broad over view of what you steward (what are the systems you are point person on?) Say a few things about each one without going too in depth, there is time for that later, they likely won't recall all of what you say, so let's be super intentional and not create a lot of noise in their brain. I always give an analogy that if the church is a hospital for the hurt, sick, dying, and lost, then Rock is our patient charts. It's also scheduling, registrations, groups, web pages, sign-ups, and so much more. But for now, let's just look at the basics.
3. Have them get out their phone, open web browser and go to your internal Rock URL
   a. I like to have my phone out for this too, and if I can, I airdrop them the URL
4. Once they are on the log in screen, have them save that URL to their home page for quick access.
5. Have them log in to their account, preferably save their credentials, create a new acct if needed.
6. Once they are in Rock, we both, on our phones, look up their profile.
7. On my desktop, I have their profile up too.

8. We compare the differences of the phone and desktop version.
9. We look over their info, make sure DOB, address, family members are all accurate.
10. We change their email to their work email and explain why that is important.
11. I explain there are all these badges and things and that they will watch a few training videos to get familiarized with those details.
12. I have them look up my profile:
    a. Have them practice how to download my V-Card
    b. Have them make a call to me while we are sitting there
13. I hand them the Staff Rock Training Sheet and ask them to watch those videos (I usually give a week for the deadline) and ask them to put the sheet in my box when complete, or send me a message that they are done. The videos take about 45 minutes to complete. (I haven't had anyone *not* watch them, haven't had to chase them down.)
14. I show them where the videos live in the Intranet, and also show them where they can find the other staff training videos for things like Finance Dept training. I also show them the Intranet "Shared Documents and Links" resources as they will hear more about those as they make their way to other departments.
15. I show them the email I am about to send them (that I have cued up and ready to go, it shows all they need to get started). I keep this the same most of the time so I just search my sent emails for "Your Rock and eSpace Credentials", copy/paste, make a few changes and go.
16. I ask them if they have any questions and tell them the fastest ways to reach me, and I go over who we are, because culture matters and I want them to breathe and be at ease in this new place: I emphasis God's grace and Holy Spirit as our Help, that we are a team that leans on each other, we all have different strengths and weaknesses, we learn and grow together, week by week, month by month, you will grow in confidence, and by 6 months, you will really start to feel at ease (someone told me when I was younger that it takes about 6 months to settle into a new role – it is accurate – and encouraging when you are in that uncomfortable new place) and I emphasize again how glad we are they are here.

    They leave at ease, they watch the videos, they let me know, and depending on what role they are in, we may set up sessions for additional training later on when they are ready and needing to go deeper. Depending on the need, their department may show them the ropes, but if needed we will do more.

    Once the foundation was laid for our onboarding process with the Rock videos, it only takes me about 5 minutes to get ready for a new hire session and my session is only 30-45 minutes. I have only showed you the Rock portion of my session, but I try to keep my other sessions short and sweet for starters too. This section is the bulk of my time with a new hire. We (or often times) their department will go deeper when it's time for hands on training.

New Hire Training Sheet

This sheet is held by HR and as HR looks at people's calendars, create meetings, and writes down the meeting times on this sheet. The main sheet goes to the New Hire and everyone else who will be meeting with the new hire will get a copy placed in their office mailbox and the calendar invite in their email Inbox.

The flow of the sheet makes sense for our organization, the departments and details will obviously vary greatly from our house to yours but I thought it might be helpful to have somewhere to start. We literally have everything on here. Then, they can see who they talked to about different things.

I hope this is helpful and you can take something of this and make it your own.

Blessings to you and yours,
Kelly

Staff Rock Training

Please watch the following videos @ ***(URL for your Staff Training Page)***

- ☐ Following People & Groups
- ☐ My Dashboard
- ☐ Person Badges & Tags
- ☐ Email & SMS Icons
- ☐ Actions Menu
- ☐ Activity Badges
- ☐ Update Addresses
- ☐ Person Profile Tab
- ☐ Extended Attributes Tab
- ☐ Sending Communications (Email & SMS)

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Completion Date: __*(1 week from the day it is given)*__

New Employee Full Name: ________________________________

Email: ____

Payroll | Staff Member: _________

- ☐ SSN & Driver License - payroll

HR | Staff Member: _________

- ☐ Staff Meeting Calendar
- ☐ Employee Handbook
- ☐ Org Chart
- ☐ Meet Staff
- ☐ Core Kingdom Values

IT | Staff Member: _________

- ☐ Gmail & Google Drive basics -*video*
- ☐ Zoom Phone/Chat Basics -*video*
- ☐ Shared Network Resources
- ☐ Confirm printers & default settings
- ☐ How to use eSpace for IT Requests
- ☐ Security IT Training -*video*

Housekeeping | Staff Member: _________

- ☐ Mailbox system and location
- ☐ Forms under mailboxes
- ☐ How to order supplies (office/Sam's)
- ☐ Personal postage and printing

Systems | Staff Member: _________

- ☐ eSpace
- ☐ Rock
- ☐ Planning Center Online (PCO)

Security | Staff Member: _________

- ☐ Alarm systems
- ☐ Building access

Finance | Staff Member: _________

- ☐ How to fill out a requisition - *video*
- ☐ Fyle - *video*
- ☐ Mileage Reimbursement
- ☐ Credit Card needed? _______
- ☐ APS (eSelfServe) Hourly/Salary
- ☐ First pay date ____/ pay schedule
- ☐ Vacation and Sick Leave
- ☐ Hourly Staff - Lunch
- ☐ Use of Gift Cards
- ☐ Amazon Business Account
- ☐ Postage Machine
- ☐ Printer Basics (copies/scanning)
- ☐ Sage - *video*
- ☐ Fidelity Simple IRA Enrollment
- ☐ Set up in Sage
- ☐ Set up in SIPlanning
- ☐ Add contact to Fyle CC email
- ☐ Add Sign in to Fyle for process CC
- ☐ Insurance/Benefits/Go365

Team Policies | Staff Member: _________

- ☐ Onboarding team members
- ☐ Expired Background Checks
- ☐ Approved Driver Requirements

Pastors Only | Pastor Name: _________

- ☐ Housing Allowance

Communications | Staff Member: _________

- ☐ Request Form & Branding

Start Date: _____________