



2023 tHRive HR Fundamentals Cohort | Workshop #6

Onboarding Practices

Thursday, September 28th

Prepared by:
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tHRive Team



[Christie Cawley | LinkedIn](#)

Christie Cawley is a Senior Partner, Executive Consultant, Certified Coach & Master Trainer at Center for Victory, a global talent management consulting firm and is also the President of CCK Consulting LLC/tHRive-People Practices for Nonprofits (www.thriveHR.work). Additionally, Christie has a BA, Applied Psychology, is an active member of the Society of Human Resource Management (SHRM), International Coach Federation (ICF), a Certified Master Trainer with Predictive Index Worldwide, Inc. and a member of Vistage Trusted Advisors.

With more than 25 years of professional experience, Christie specializes in leadership development, talent management and business performance using science and the Predictive Index suite of tools to help clients overcome their most challenging human capital and hiring dilemmas. Christie has extensive experience a human resources leader, non-profit executive, executive coach and business consultant, and supports organizations through significant change implementation and coaches for successful execution and sustainability.

Non-Profit Experience: ACTION Housing Inc., AIR, Allegheny Conference, Allegheny Health Choices Inc, Carriage House Inc., Center for Theater Arts, Center for Women, Children's Hospital of Pittsburgh, Construction Junction Inc., CISPAC-Communities In Schools Pittsburgh Allegheny County, DePaul School for Hearing & Speech, Easterseals of Michigan, Family House Inc., Family Means (Wisconsin), Global Links, Hillman Family Foundations, Humane Animal Rescue, Juniata College, Methodist Church Union, NAMI Keystone, National Council of Jewish Women, Pittsburgh (NCJW), P3R, Peoples Oakland, PRC- Pennsylvania Resources Council, Regional Housing Legal Services, The Forbes Funds, Trying Together (formerly PAEYC), University of Pittsburgh (Department of Athletics & Student Life), YMCA Central Virginia, YMCA Greater Dayton Area, and YMCA Greater Pittsburgh.



[Judy Eakin | LinkedIn](#)

Judy Eakin has been working in the nonprofit sector for over 35 years. She was a Director at George Junior Republic and CEO of Pittsburgh Big Brothers/Big Sisters. For the last 24 years she was the CEO of HEARTH increasing its size and number of families served by over 100%. Judy has a Bachelors and Masters degree in Social Work and is a certified Marital and Family Therapist. She has also completed multiple training programs offered by the University of Pittsburgh, Harvard, and Duquesne University with focus on strategic planning, fundraising, program evaluation, and employee development.

In addition to working with boards in her employment, Judy has also served on the Board of Directors and committees for numerous nonprofits. She specializes in Board Development, Program Development, and Strategic Planning. During her time as the "de facto Human Resource specialist", Judy created, modified and implemented policies, job descriptions, and performance evaluations, including those for volunteers and clients. She successfully managed her agency through COVID -19 with help from Christie and the tHRive program. Judy's strengths include identifying and responding to change, relationship development, revenue diversification, and coaching for growth and success.



[Joel Skerlong | LinkedIn](#)

Joel Skerlong currently serves as a Project Administrator for tHRive and CCK Consulting LLC and also operates a remote consulting practice for Talent Management Agencies within New York City. Joel specializes in analyzing the components of business strategy, implementing value additive procedures within people operations practices, and developing/driving performance management initiatives. Joel recently obtained his certification as a PI Practitioner for the Predictive Index Worldwide, Inc.

Workshop #6

Onboarding Practices | Agenda

- I. Onboarding (As of Day 1)
- II. Designing the Orientation
- III. Two Components of Measuring Performance
- IV. Training/Learning Methods & Options
- V. Learning Styles & Best Practices
- VI. Managing vs. Coaching Discussion

Onboarding (As of Day 1)

Purpose of Orientation

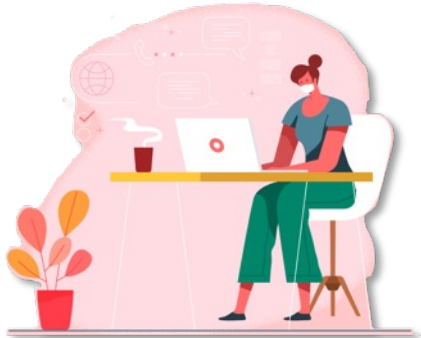


Designing the Orientation



Designing the Orientation

Orientation to the Organization



Orientation to Manager/ Leadership Style



Orientation to the Team



Orientation to the Job



Orientation to the Culture



Orientation to the Sector



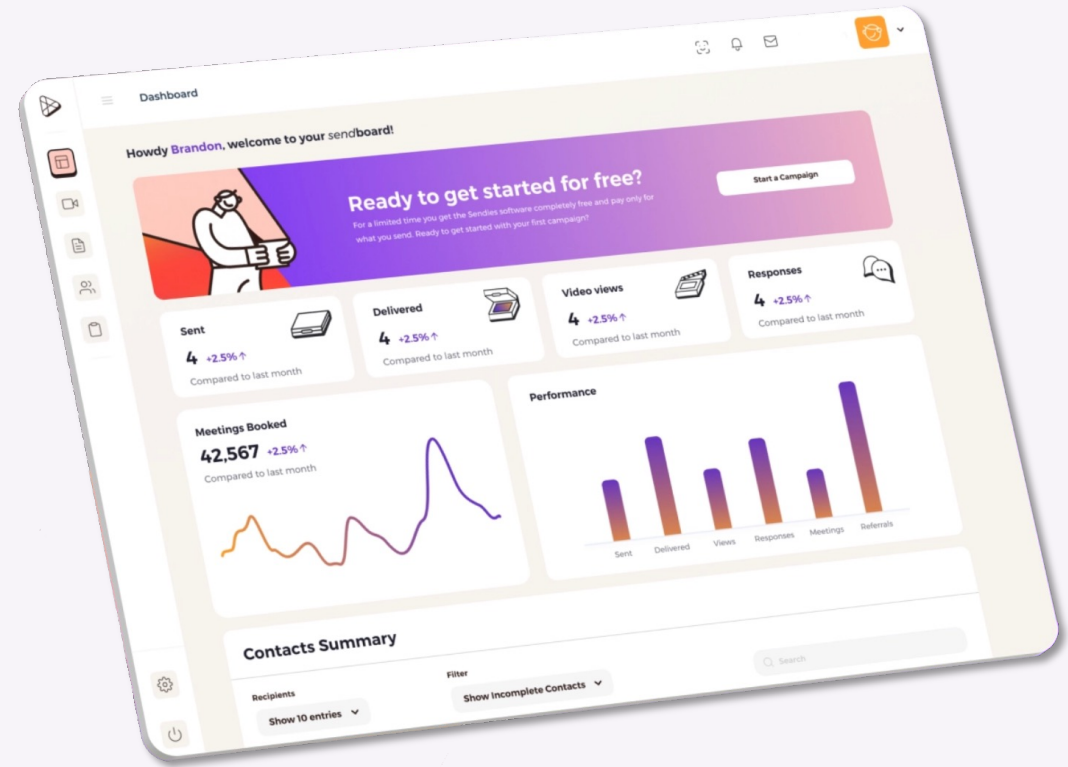
Measure Performance

Measure Performance

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Measure Performance

Two Components of Measuring Performance



Two Components of Measuring Performance

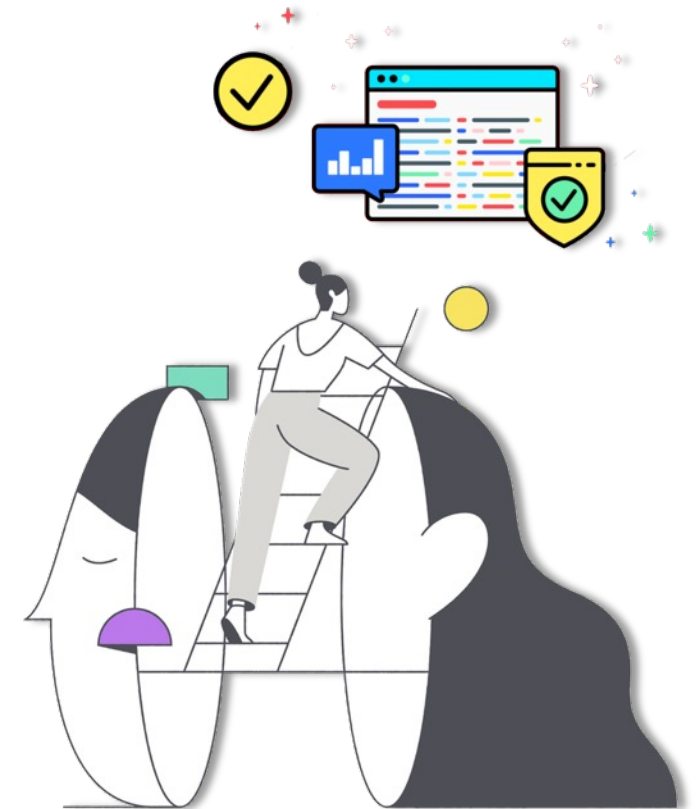
As you design/review your organization's orientation plans around the Organization, Manager/Leadership Styles, Team, Job, Culture, & Sector please consider What Gets Done & How It Gets Done.

What Gets Done (Concrete)

- Achievement of Goals, Metrics
- Output, Level of Completion
- Quality of Deliverables & Work Products

How It Gets Done (Squishy)

- Interpersonal Dynamics
- Team Interactions
- Collaboration
- Effort, Contribution, Engagement, Alignment
- Relational Skills



Training / Learning Methods & Options



Training / Learning Methods & Options

Traditional Training/Learning Methods: Traditional approaches to training still offer several benefits and are commonly found in many companies today.

1. Classroom-Based Training Programs
2. Interactive Training
3. On-The-Job Training

Modern Training/Learning Methods: In the modern workplace that consists of remote employees and diverse cultures, training methods for employees have changed.

4. Social Learning
5. Online Training



Training / Learning Methods & Options

How To Choose The Right Workplace Training/Learning Methods

While it might seem fantastic to have so many options available, choosing the right training methods for employees is an important decision. It doesn't matter how much money you invest in training if it's the *wrong* training. After all, even an expensive square peg won't fit into a round hole.

Here are 3 questions to identify the most effective employee training methods for your training/learning program.

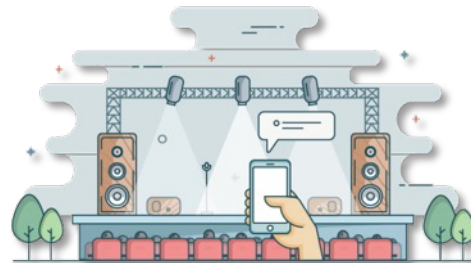
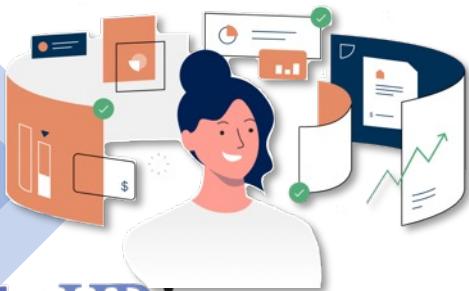
1. What Is The Purpose Of The Training/Learning Program?

2. Who Is The Intended Audience?

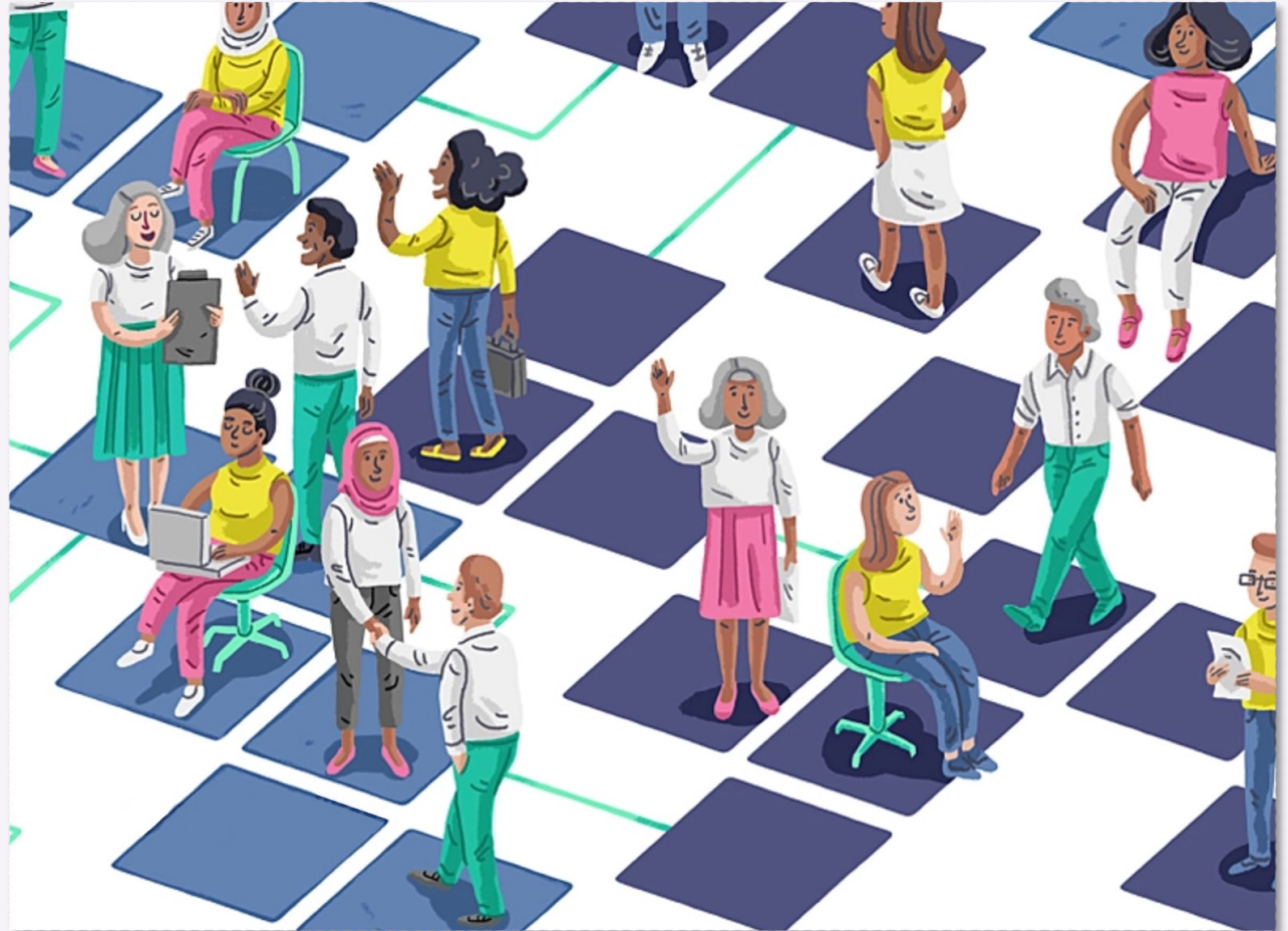
- Demographics
- Nature Of The Job
- Level Of Seniority
- Individual Versus Group Learning

3. What Are The Constraints?

- Money
- Time
- Other Resources

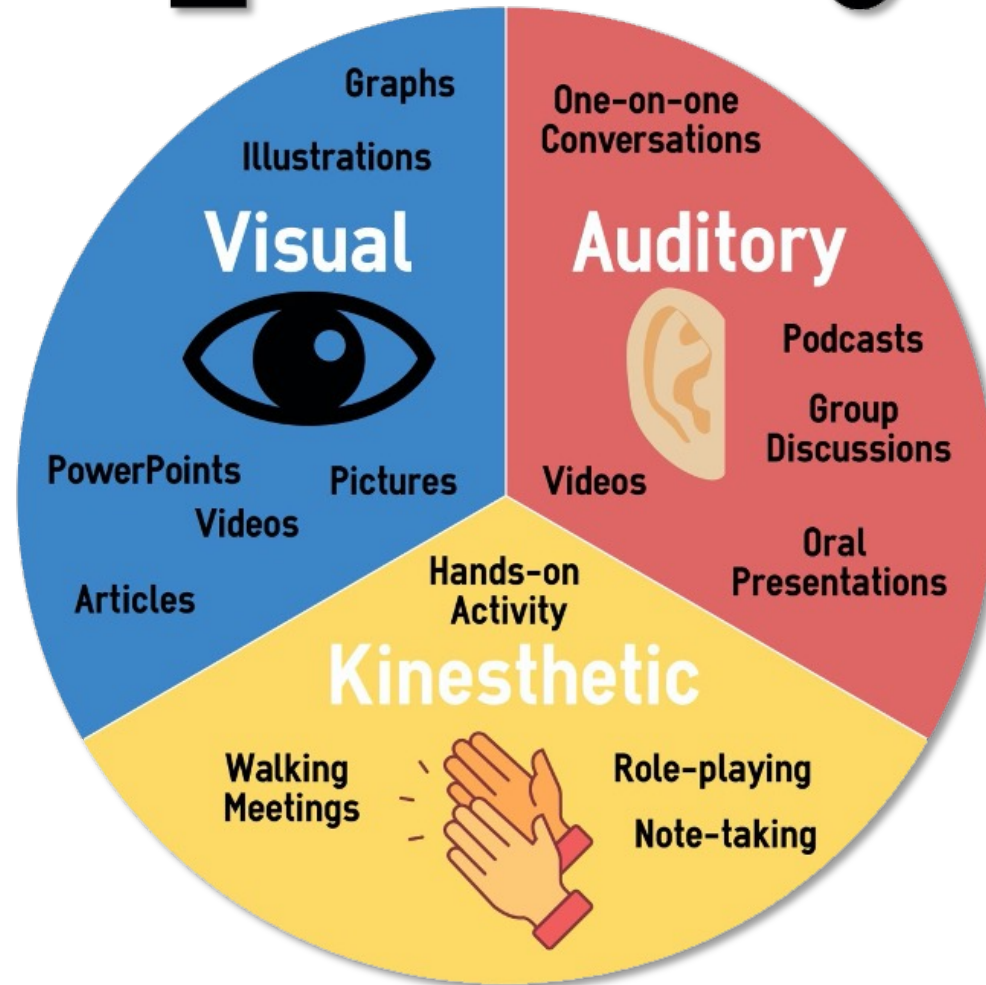


Learning Styles & Best Practices



Learning Styles

LEARNING STYLES



Best Practices to Support New Hires

No single best leadership style for all situations

- What is the starting place of the new hire – how can you supplement gaps?
- Observe technical knowledge and capabilities (“Competence”) and approach/attitude (“Commitment”) to assess Development Level of new hire
- New hire will follow continuum – linear progression in learning “how to,” variable levels of excitement and confidence throughout the learning

In order to be effective, adjust degrees of Support and Direction to meet the development level of the new hire.

Enthusiastic Beginner

- Provide lots of direction
- No need to supplement enthusiasm

Disillusioned Learner (Making Progress)

- Continue direction (Decrease as they demonstrate proficiency)
- Increase support (they may be less enthusiastic or confident)

Capable but Cautious

- Less direction
- Get employee involved in idea generation, problem solving

Self-Reliant

- Decrease detailed management
- Ensure employee has support and accountability

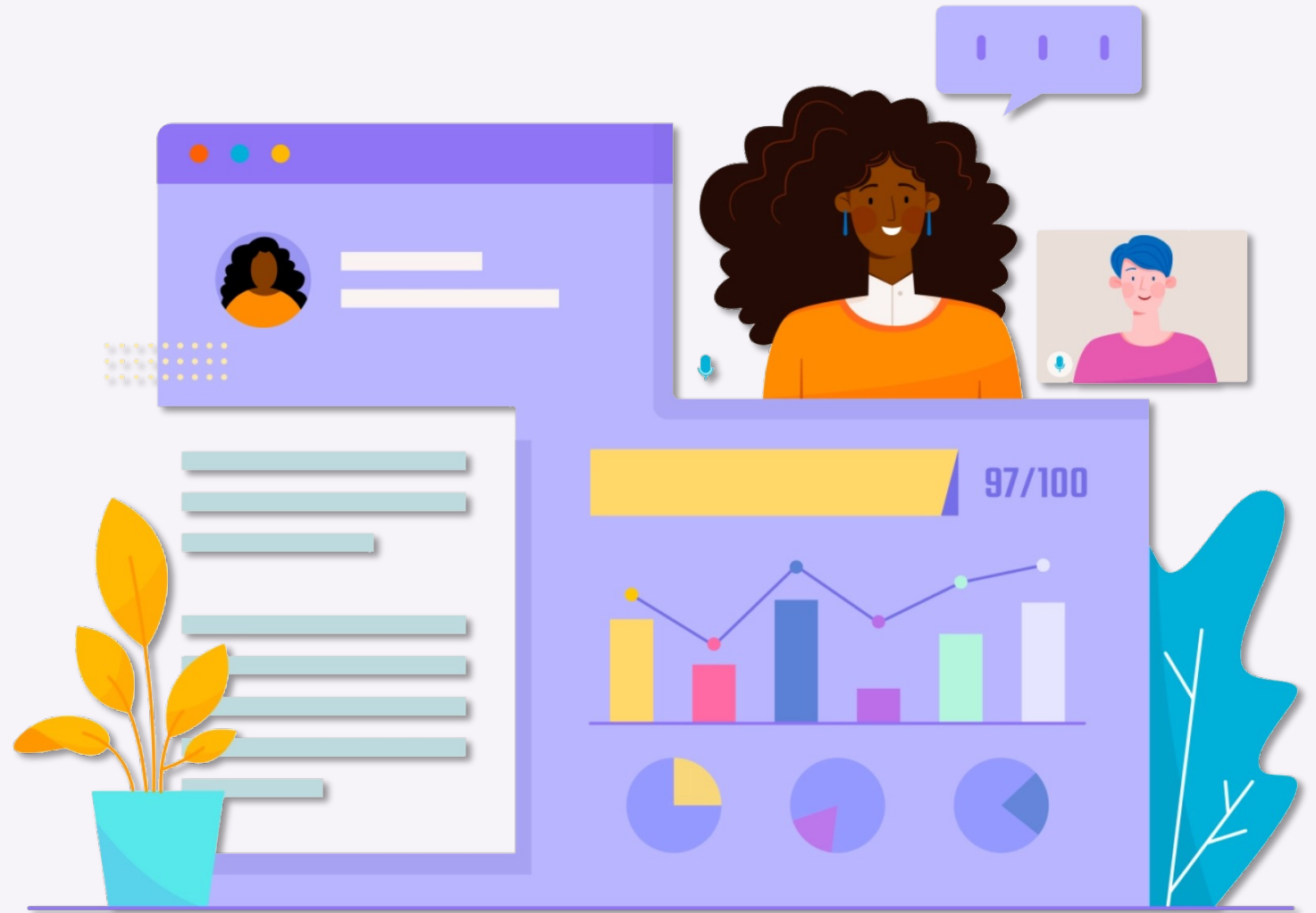
Concept and terminology created by Dr. Paul Hersey and Kenneth Blanchard *Situational Leadership Model*

[Situational Leadership Model Explained \(10-Minute Video\)](#)

[Situational Leadership Website](#)



Managing vs. Coaching | Discussion



Managing vs. Coaching | Discussion

A coach is a more consultative, **employee-focused role that supports employees looking at their current and future reality**. Coaches focus on asking questions to help the employee uncover the root of a problem and produce an action plan themselves, rather than telling the employee the plan to follow. They encourage the employee to determine the problem and solution themselves.

Managers and Coaches are not the same thing; however, managers do often play a coaching role for their employees. In some organizations, coaching is often a function of an effective manager. Let's explore how the coaching role is different than a manager's role to gain a better understanding.



Being a manager is a more **directive and transactional** role than being a coach. **Managers oversee the work of their employees**. A manager produces a plan then tells or directs the employees on what to do. They are more focused on themselves determining direction, the immediate need and fixing the problem with a specific outcome.

Verbal – what we say

- Words you choose, Vocabulary and grammar, Jargon and idioms

Vocal – how we sound

- Tonality, Pitch, Pace of speech, Volume

Visual – how we appear

- Posture, Gestures, Facial Expressions, Eye contact, & Attire

Discussion | Examples



Q&A / Next Steps

