BEST PRACTICES:

NEW HIRE ONBOARDING - CREATING SUCCESSFUL FIRST 90 DAYS EXPERIENCES

an AVIXA Systems Integrators Council Reference Document

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Introduction

The purpose of this guide is to provide a reference for Systems Integrators and other companies, as good employers, to develop a successful onboarding process for all new hire employees. This is also intended to function as a reference tool for new employees as to what they should expect and what to ask for help with to ensure a positive onboarding experience.

It takes a lot of time and effort to attract, interview, sort, and hire the best and brightest individuals for roles within our companies. See "Attracting Qualified AV Candidates" published 2018 by the AVIXA Systems Integrators Council.

Many times we are hiring from within the industry; However we must make no assumptions of the inherent knowledge and ensure that our teams are all starting with the core elements of the standards approach and best practices of our industry. This includes everyone from client facing roles to administrative staff. We need to ensure that each team member understands the industry they are working in as well as to have enlightenment as to what their colleagues in other roles must do daily. This provides a better business understanding and the general intent of requests from various departments.

The goal of this document is to provide a road map for creating a smooth onboarding experience for the employee and employer with the long term goal of employee retention and growth for everyone involved.

The "First 90 Days"

The first 90 days of your new hire's onboarding process should not be thought of as "calendar days" as this may actually take longer or shorter depending on the individual's experience and progress. This should be thought of as a training and evaluation period. This is a time when a company can best evaluate whether the new employee is a good fit for their current position or may actually be a better fit somewhere else within the company. For example there are many times people hired for Field Technician positions have been moved into a Project Management role due to their previous experience and field management skills. This period is a time when as employers we need to make sure we are setting our company and our employees on a path to success.

Make a Plan

Even before the first day for your new employee there should be a team assembled to ensure the smooth onboarding process. This team typically consists of the manager or director that the employee will report directly to, a representative from Human Resources (HR), and the new employee's mentor. They should meet beforehand and develop a written onboarding plan for the new hire. If your company already has a process in place this should be reviewed and updated to specifically address the individual starting the specific position. There are no "one size fits all" solutions for this. Each person should be treated as the individual person that they are and you need to make sure they are treated as an integral part of the organization they are joining. Your Planning Team should establish who is responsible for following up with the new hire and when they should do so once they begin their onboarding.

During this planning process also be acutely aware of your company's Diversity and Harassment Awareness policies to continue creating a safe and welcoming environment for all of your employees. HR should ensure that everything you discuss and plan are in compliance with all local, state, and federal employment laws.

In these post-pandemic times an eye should be kept on the possibility that your new hire may primarily be working remotely either at home or at a client location. If this applies to your new-hire you will want to include in your plan a way to help your employee set up their space(s).

If they are going to be at a client's location you'll want to start them with some time in your office or branch location before having them report to the client's site. This way they have time to acclimate to your company's culture before you introduce them to your client where they will be representing your company.

Your HR representative will ensure that proper training is provided to help employees understand how to recognize and respond to harassment and discrimination, as well as how to behave appropriately and prevent harassment from occurring in the first place. This training should include compliance with all local, state, and federal laws covering harassment, discrimination, equal employment, and Americans with Disabilities (ADA).

Make a Plan *(continued)*

HR will also want to share the company policies and programs supporting inclusion in the workplace. The goal should be to help your new hires come to understand the legal, business, and personal reasons for not discriminating against those from other cultural or religious backgrounds as well as LGBT+ individuals. It should help to recognize that the workplace needs to be a place of equality and respect and understand that it's all of our responsibilities to not create differences but rather focus on building a successful company culture.

The entire team should build the onboarding experience with the employee's and company's culture and health in mind. Meaning that it's not just the plan to make sure the employee is provided all of the physical tools and education they need for the job but also providing all of the resources your employees will need to help with their "work - life balance". This includes things like mental health and substance abuse counseling and how best can your employees make use of them in a safe and supportive environment.

Within your plan you will want to establish weekly "touch base" calls with HR and management for your new-hire. These can move to a monthly occurrence once the 90 day threshold is reached. The key point to keep in mind is that these should not be viewed as "formal reviews" but opportunities to take the pulse of your employee and your company as to how they are progressing. All parties should feel free to share pain points or possibilities for improvement and growth in a non-judgemental open environment. Saying "your door is always open" but not being open to hearing input will put speed bumps on your road to success for your company and your employees. There should be a way for your team to invite feedback or help specify what types of feedback there are and where they can be properly directed.

Some topics you may want to consider are:

- Are you on track with training?
- Are you comfortable in your position?
- Ready to take the training wheels off?
- Are you adjusting to your environment, are there things we can be doing to help in your onboarding?
- Opportunities for growth
- Short and long term goal setting

In the new employee's first week the HR team should hold a session that outlines the prospective career path and direction the company expects the employee will follow. As well as action items to ensure the candidate understands the long-term approach to onboarding and training.

Mentors and Shadowing

Mentorship is a very important tool in creating a successful career path for your new hires. The sooner you can introduce your mentor to the new hire the better. This shows the new employee your company's commitment to their successful onboarding experience and a resource they can rely on to advance within the company as well. Mentorship is an opportunity to make sure your new employees are being exposed to the company culture, learning and retaining knowledge about company processes, and can also have informal conversations about career satisfaction and future planning in a coach/player type of environment.

Another successful program used in the audiovisual industry and others that The Planning Team should be sure to include in their program is known as "Job Shadowing". This is where you plan time in the field for your new hires to shadow your experienced team members and learn more about what they do and how they do it. So for instance, you would typically send your new junior technicians out in the field with your senior technicians, but have you considered sending them out with your sales team? This is a way they can learn about what happens at the front end before the design and installation phase. This can expose your new employees to the way your company supports clients and helps build successful relationships and experiences.

On the sales side, teaming your new salesperson up with a project manager or senior field engineer can do wonders for exposing your sales team to the actual reasons engineers and designers ask the questions they ask. They can see the issues installers run into when they don't know ahead of time what the site conditions are where they are installing the devices. They will have a chance to see how spaces are being used and can better help clients make decisions on what solutions they are really looking for versus what they think they need. For example, they may really need several strategically located Bring Your Own Device (BYOD) small meeting rooms instead of one high dollar complex meeting room that is seldomly used due to its size and complexity.

Make Sure We're Talking About the Same Thing

In your onboarding plan you will want to make sure to include a company glossary that clearly defines company terminology. This will help your new hires understand what everyone is communicating about but also "relearn" terminology that may have been different in their previous working environment. This is especially important for employees who are new to the industry.

Terminology can vary depending on different parts of our industries including Live Events, Design-build, Independent Contractors, Streaming, In-house Services, and more. These consistently change and evolve as the technologies change. Well defined job descriptions and responsibilities should be kept up to date and be available before and after onboarding to be clear on various pathways to success.

Here is a listing of some common employment positions that may have different titles or responsibilities depending on, geographically, where they will be working:

Field Installation Positions:

- Cable Puller
- Installation Technician
- Lead Technician
- Field Engineer
- Programmer
- Onsite A/V Technician
- A/V Project Manager
- Broadcast Technician
- Operations Manager
- Streaming Engineer

Once your onboarding plan has been created and approved be sure to share it with your new hire before their first day so they can prepare as well. This will give them an opportunity to review what will be expected of them and they can come up with any questions they may have before they jump in.

Get the Tools Ready

Part of your pre-planning process needs to include establishing the tools your new-hire will need. While this may include the physical tools they would need in the field if they are a technician, this can include the technology and software as well. You will want to include your IT Team in this part of the planning.

The team will have to establish the new hire's network access. For instance, a salesperson's access vs engineer vs field technician. This may also include a time frame depending on position, experience, and length of employment. For instance with a temporary employee or contract (independent contractor) you may want to give them limited access to files or limit their access by a specified time frame.

The HR representative will also want to ensure that any IT / Network and IP (intellectual property), security, and NDA's (Non-Disclosure Agreement) are signed and reviewed before the new hire has access to the company's networks and files.

The team should also specify whether the employee will be using a desktop PC, laptop, or tablet. This device should be set up ahead of time with the needed software and accounts for their position. For example, Office 365, MS Teams, Zoom, Visio, AutoCAD, credentials to name a few. If there are manufacturer specific softwares they need you may want to include them as well. If you are repurposing devices that were used by previous employees, we recommend completely wiping these devices and starting new as you don't want your new employee to feel they are getting a hand-me-down on their first day.

This may sound obvious if your employee will be office based, but you definitely need to make sure their workspace is set-up, clean, and available before day one of the new hire. This is a location for you to have staged all of the tools, person protective gear (PPE), uniforms, company logoed shirts, etc. Be sure your other employees are aware that the new employee's work area has been set up in anticipation of their start date. You should also consider establishing a welcoming reception for your new team member and that others are aware of the special occasion.

What Does this Planning Look Like in Action?

Below is an example of what the first week may look like. These are key areas to include as mile markers to build your onboarding plan around.

Day One - Culture Experience (Monday)

The new employee's Direct Supervisor/Manager needs to meet the new hire upon arrival and welcome them to the team. The key part of this is making them feel welcome.

- Bad experiences begin on day one when a manager can't find time to meet the new hire and get them settled properly.
- You shouldn't be "handing off" your new team member, you should be helping them set up and prepare to flourish.
- Not a good first day experience when a new hire is told "I didn't know you were coming so I'm not sure where you're sitting, and we'll find you someone's laptop later this week."

Time to learn "who's who". Where does your new hire go to get the information and tools they need to be successful?

- HR: Employee Manual, Payroll, (Safety Compliance Training [OSHA, etc.])
- Accounting: Expenses
- Marketing: Business Cards, Email Signatures
- Logistics: Warehouse, Shipping/Receiving, Supplies
- IT: Laptop, PC, WiFi/VPN credentials, software, hardware, cell phones,
- Training: Industry Certifications, Manufacturer Training, Safety Compliance Training [OSHA, PPE, etc.]
- Others: Fleet Management, Facilities Management, Security (building access, ID Card)

Lunch with manager and mentor. Get to know each other and break the ice as well. Managers and mentors need to make sure they make time for this on the very first day to set the expectations of your new employee. If you are unable to make time for your new hire you need to review your onboarding plan.

What Does this Planning Look Like in Action? *(continued)*

Days Two through Five

- Continue learning "who's who"

- Learning the company culture

- HR training on Harassment and Descrimination prevention

- HR training on company process

- Learning processes and software to be used daily

- Possibly begin job shadowing

- Introduction to Team Huddles

Day Five - Are you coming back Monday? (Friday)

- This might be a funny question, but Friday should be a review of the week with your new hire to see what's been going right so far and what might have been missed.

- HR should ensure all paperwork and policies have been addressed.

- Manager should address the "what's next" plan.

- Review the action plan with your new hire, who will they be shadowing, what training is coming, what additional tools, supplies, and safety gear is needed, and most importantly when can your hire expect these items?

What Goes on After the First Week

Your follow up is just as important as your pre-planning to build on the foundation you have laid out for your new hire. Plan for weekly touch base calls or quick meetings to see where they are at and how they are proceeding.

We mentioned these earlier but they bear repeating some topics you may want to consider are:

- Are you on track with training?

- Are you comfortable in your position?

- Ready to take the training wheels off?

- Are you adjusting to your environment, are there things we can be doing to help in your onboarding?

- Opportunities for growth

- Short and long term goal setting

You should also meet or touch base with the new employee's mentor to see if there are concerns or opportunities for improvement that can be brought up in an informal way to coach the employee in correcting their actions in a sort of pre-emptive strike to help keep them on a constructive path and avoid issues in the future.

Taking Off the Training Wheels Doesn't Mean Training is Complete

Here are some examples of training tracks based on employee specific positions. These are not necessarily the only training your employees should complete, but are an industry recognized starting point that can be easily integrated into your onboarding plan.

All New Hires without CTS Credentials

AVIXA - General Knowledge

- Quick Start to the AV Industry Online
- Essentials of AV Technology Online
- AV Project Cycle
- AV Technologist Test

Project Manager

- AV Math Online
- Project Management for AV Online
- Introduction to Installation Online
- AV Design Level I: Environment Online

Technician/Installer

- AV Math Online
- Project Management for AV Online
- Introduction to Installation Online
- Elements of System Fabrication Online
- Installation I: System Fabrication
- Primary Manufacturer Trainings and certifications
- Audio tuning / troubleshooting
- Video transport / EDID / HDCP
- Core Technology Certifications (Networking, cybersecurity, Transport, Programing, Dante, AVB, HDBaseT, SVDoE, IPMX, etc.)

Design, Engineering, and Programming

- AV Math Online
- AV Design Level I: Environment
- AV Design Level 2: Infrastructure
- AV Design Level 3: Applied Design
- Network Design and Security
- Primary Manufacturer trainings and certifications
- Core and Manufacturer specific programming certifications
- UC Platform configuration - Platform and Manufacture specific training (Teams, Zoom, Google, etc.)
- Core Technology Certifications (Networking, cybersecurity, Transport, Programming, Dante, AVB, HDBaseT, SVDoE, IPMX, etc.)
- Possibly CCNA courses or equivalents.

Sales

- See all new hires without CTS credentials
- Ride along with Senior Account Manager
- Manufacture product sales training

Live Events

- Event Setup for AV Techs Online
- Project Management for Live Events
- Manufacture product operations training

Administrative Professional, inner office personnel, etc.

- See all new hires without CTS credentials

Continuing Education

A key part of continued growth for your employees and your organization is continuing education. This should be looked at as an active avenue for not just increasing the team's knowledge on technology and standards, but exposure to growing markets and applications for technology that may have not been on your radar in the past.

Your front-line workers should also be working to achieve a minimum certification level of CTS within a specified amount of time from date of hire. Companies may want to consider incentivising your employees, possibly even during the hiring phase, to achieve these certifications and see it reflected in an established bonus or salary change.

Each role may vary in this timeline depending on experience, workload, and aptitude. Remember, you are setting up your employees to fail in regards to continuing education if you aren't providing time in their schedules to adequately complete the training you are expecting from them.

Suggested Time to CTS

SALES

- CTS - 1 year if the employee has been in the industry for some time (2-3 Years if new to the industry)

PROJECT MANAGERS

- CTS - 1 year if the employee has been in the industry for some time (2-3 Years if new to the industry)
- OSHA 30 - Year 1
- CTS-I - Year 2
- PMP - Year 3

TECHNICIANS/INSTALLERS

- CTS – 6 to 9 months
- OSHA 30 - Year 1
- CTS-I - Year 2
- CTS-D – Year 3 usually only if they are planning on an engineering, design or programming path

DESIGN/ENGINEERING/PROGRAMMING

- CTS – 6 to 9 months
- CTS-D – Year 2
- CTS-I – Year 3 (optional)

Continuing Education *(continued)*

Each employee will need to retain these CTS certifications through education that offers renewal units. Typically we would recommend attendance at InfoComm and regional trade shows, AVIXA Training (online and/or in person) and Manufacture Renewal Unit (RU) Programs.

Typically, Manufacturer Training from your most commonly aligned partners can provide solutions at multiple levels. They can address expanding your employees product knowledge but may also expose them to different transport solutions like Dante, AVB, HDBaseT, SVDoE, IPMX and computer networking basics at the same time. Plus they can be earning RU's towards the CTS renewals and satisfy your vendor's training and certification requirements for being a dealer in good standing.

Companies should put programs in place to allow and support employees earning RU's within the needed time frame. This can include:

- Manufacturer Lunch and Learns (monthly / quarterly)
- Allowing "remote days" for employees to participate in online training and webinars (quarterly)

While we haven't included additional educational efforts for non-industry specific specializations, additional educational solutions for some roles can be found outside of AVIXA:

- Sales education and business certifications
- Project Management certifications (PMP)
- Administrative certifications
- Live Events and ABPM Certifications

So Where Do We Go from Here?

This document has been a few years in the making. We interviewed HR personnel from within our industry and outside it to see where their pain points have come from in regards to successful/not successful onboarding experiences. At the same time, our authors pulled from their collective experiences over the years, both positive and negative, to develop this guide as a tool to help create better experiences in the future.

As we interviewed the HR managers around our industry in North America, Europe, and Asia there was a common theme we noticed when we asked what their onboarding plans were. Most stated "we don't have an established plan but can we get a copy of this one when you finish?". This was encouraging and disappointing at the same time. We knew we were on the right track to address an important issue in our industry but it was also disappointing that this hadn't been approached from the employers side.

On a positive note, the Rising Professionals Council (formerly the Young AV Professionals Council) has created a guide for new hires called "The First 90 Days." This document provides tools to succeed in our industry. It is geared towards new Installation Technicians, Sales & Marketing Professionals, and Live Events Personnel in the Staging, Lighting and Audio fields. This is a great resource for looking at what to expect from the employee side. A link to this document can be found in the "Resources" section at the end of this document.

We hope we have provided you with a roadmap to follow as you develop your own onboarding plans specifically for your company. We have worked closely with the AVIXA Diversity Council, Women's Council, Rising Professionals Council, Independent Technical Services (ITS) Council, AVIXA Membership Committee, and our own Systems Integrators Council to attempt to capture concerns and issues that face employees and employers in today's work environments.

One of the worst things for a new employee or employer to discover 30 days into a new position is that they aren't the right fit and decide to part ways. This isn't a positive experience for either party and usually affects your company's bottom line fairly quickly. But taking the time to pre plan for your new hire before they enter your building can help to create a positive experience that leads not just to growth but retention of good employees.

The old saying goes "Failing to Plan is Planning to Fail". We hope we have provided you with the tools you need to build successful first 90 day experiences for your business and your employees.

Thank you to our fellow councils for their input & support:

AVIXA's Diversity Council

AVIXA's Women's Council

AVIXA's Rising Professionals Council

AVIXA's Independent Technical Services (ITS) Council

AVIXA's Membership Committee

and our own AVIXA's Systems Integrators Council

Thank you to our authors:

George "Red" Fournier Jr., CTS

Nathan Hufford

Resources

AVIXA Systems Integrators Council's previous projects:

- Attracting Qualified AV Candidates
  https://cdn.avixa.org/production/docs/default-source/default-document-library/avixa_qualifiedavbrochure_v3_preview.pdf

- Best Practices: Independent Contractors in the AV Industry:
  https://cdn.avixa.org/production/docs/default-source/default-document-library/avixa_independentcontractors.pdf

- For more information on AVIXA's Councils and Committees visit:
  https://www.avixa.org/membership/committees-councils

- Rising Professionals Council's - First 90-days project booklet
  https://cdn.avixa.org/production/docs/default-source/default-document-library/yav-90-day-project-booklet-preview-(3).pdf

- The AV Integrator's Guide to Certification and Training - By Alan Brawn
  https://www.commercialintegrator.com/download/the-av-integrators-guide-to-certification-and-training/

- Exploring AV Careers:
  https://www.avixa.org/what-is-av/explore-av-careers

Training sources found outside of AVIXA:

- SkillPath
  https://skillpath.com/

- Salesforce Sales education
  https://www.salesforce.com/eu/services/learn/overview/

- Project Management certifications (PMP)
  https://www.pmi.org/certifications/project-management-pmp

- CompTIA A+ Certification Training
  https://www.comptia.org/training/by-certification/

- Cisco Certifications
  https://www.cisco.com/c/en/us/training-events/training-certifications.html

- Association of Briefing Program Managers (ABPM)
  https://www.abpm.com/