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## Onboardin

Before you head into  
have a click through

# How to automate your onboarding

A how-to guide from our training wizards

eBook by

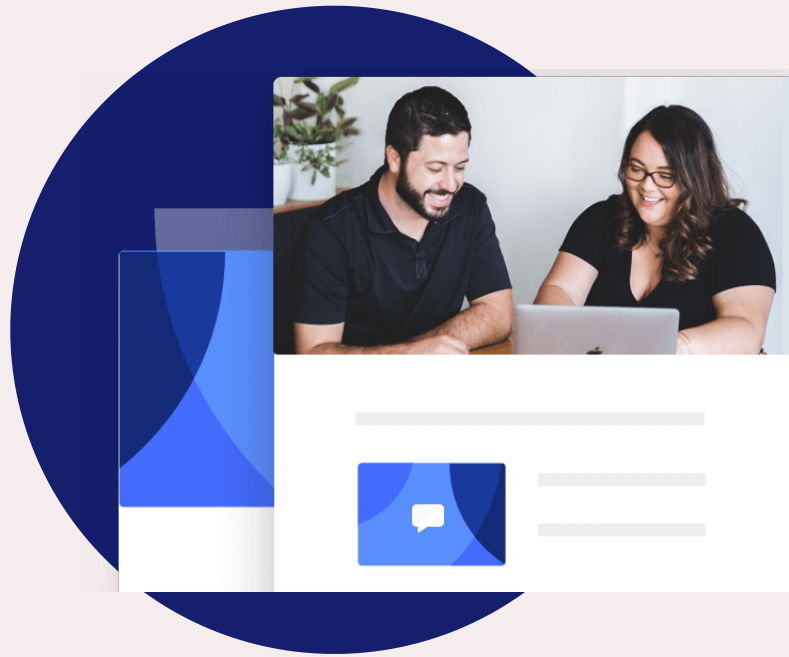


Online training. Anywhere.

# About this guide:

Automation can sound scary when you think of AI and terminators running amok. But automation can also be useful by leveraging it to get back valuable time for you and your team. By leveraging tools like Zapier, all you have to do is plug in the details and the technology does all the work.

For an online training platform like Coassemble, we leverage these tools to maximize training delivery and measurement. Your onboarding process is one such example. By creating triggers to send training to new team members, invite them to workspaces, deliver assessment, and provide access to training resources, you're able to accelerate your onboarding process. This guide provides an in-depth look at how you can automate your onboarding and get time back for you and your team (maybe enough for a pizza party?). Let's take a look at some of those examples below.



In this guide, we're going to walk you through:

- **How to leverage tools like Zapier to automate processes**
- **What you'll need to map out learner pathways**
- **Why it's beneficial to automate your onboarding**

We'll also cover some great use cases where automation can save you time and boost productivity. These are proven examples we've developed with our customer base, and a great starting point for training automation.



# Things you'll need to automate your onboarding

This isn't an exhaustive list of tools available, but rather some recommendations you'll want to get started. If you find a comparable option to something we list below, feel free to swap it in place.

## Software with an online training platform:

- [An online training platform or LMS](#)
- [Zapier](#)

## Software without an online training platform:

- A delivery method like email or instant messaging
- Training materials stored in one space such as [G Drive](#) or Dropbox
- [Zapier](#)
- An assessment tool or method for measuring your training analytics (this can even be a poll or question feature in your communication platform).



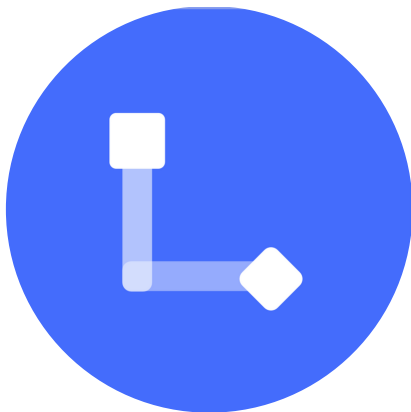
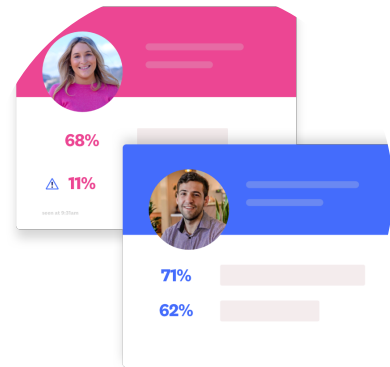
So once you have everything, let's give you a brief explanation of how Zapier is a key tool for onboarding automation.

Zapier is an incredibly advanced tool that leverages the ability to connect apps through integrations that can automate actions between two (or more) platforms. Because Zapier is a third-party application, they're able to integrate nearly any platform you use into an automated process, or Zap, as they call it.

So let's say you have a weekly update message you send on Slack, but you have several channels to send it through. Rather than drafting it and sending it separately, you can use Zapier to create one action for everything. All you have to do is enter your message, what channels you're sending it to, and how often you want it sent. The rest is automated so you can create one message and it's shared with all the channels at once. Let's see how we can use it to automate your onboarding process.

# Getting started with automation

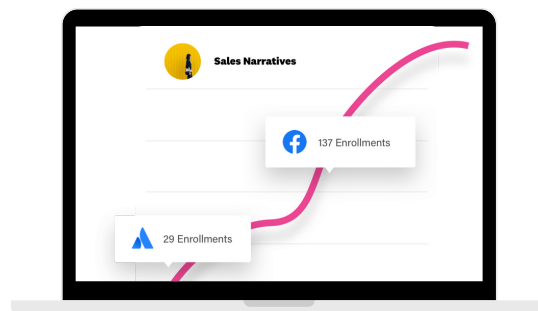
The most effective automated processes are ones thoroughly planned out to achieve desired outcomes. If your goal with onboarding is to rapidly enable a new employee to be effective in their role soon, you'll want to think about how they'd normally get there. For training, we refer to this type of planning as "learner pathways"—road maps from beginning to end for training content.



Learner pathways usually are most effective when you include the following information:

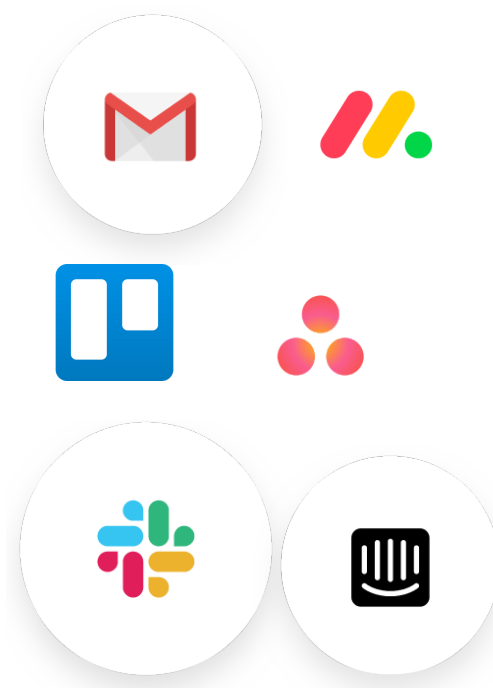
- The learner or learners you want to train
- What the goal of the training will be (this can also be the expected outcome)
- What knowledge and skills do you need to transfer in this training to meet that outcome
- What your delivery method will be to share this training
- What your measurement method will be to gauge how effective the training is (did it meet, exceed, or miss your expected outcomes?)

Something important to consider with training is how this experience will shape your new hire's first impression of the company. You want to include the best parts of working with your company. A welcome video from the CEO or some pictures from a day with the team will shape the experience.

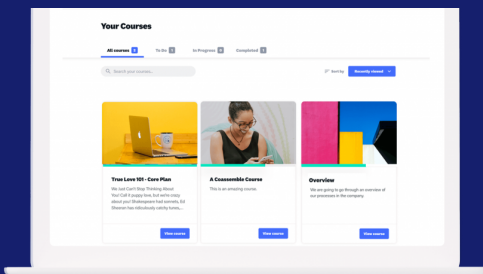


A great way to create some of this training is evergreen training that won't require too much updating. Think about static things that don't change often like the break area's appliances, leadership for each department, or platforms everyone uses. But even just providing a brief video or some slides about this information will brand your onboarding experience and build recognition for your new hires.

## How to implement automated onboarding



Now that you have the tools to automate, it's time to start taking action! With an online training platform, most of your work will be uploading your training content and scheduling. Without an LMS, you can still feasible pull off a great execution on the plan—you just have some more manual processes for each step below. So how exactly should you schedule that delivery to new employees? Don't sweat—we have a process for that.



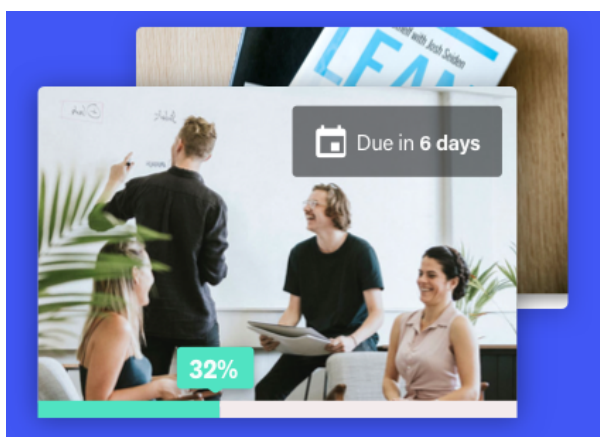
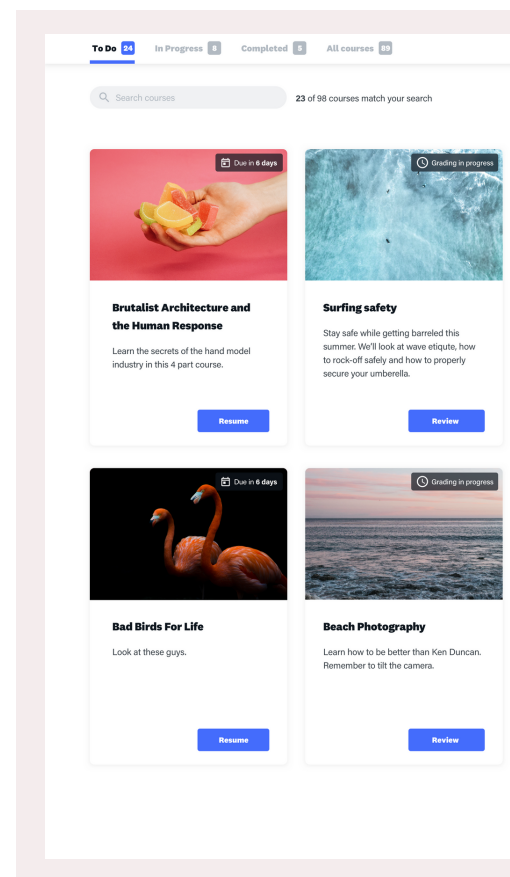
**First**, create and upload your training content into one space. This will give you a snapshot of everything you have (and any gaps you need to fit). Most training platforms have a mass-upload option so you can get everything into one space quickly. This organization also helps you streamline everything for updated branding and policies/standards. If you're running outside a platform, try to get all your content sorted and stored in one space for easy access to everything.

**Second**, organize your learners by role, department, and knowledge levels. Sometimes you'll be onboarding a completely green candidate and need to provide them with extra training. With more experienced employees, onboarding them will include company methods of completing tasks they're familiar with already.



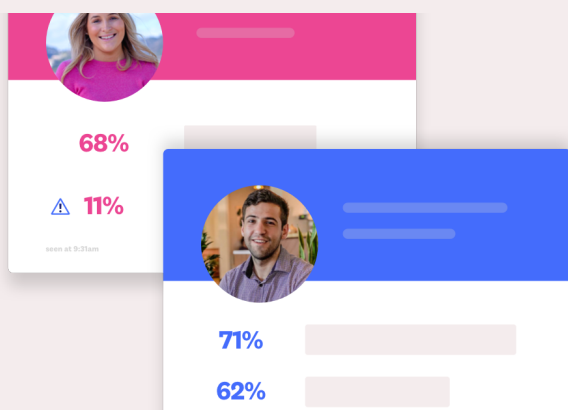
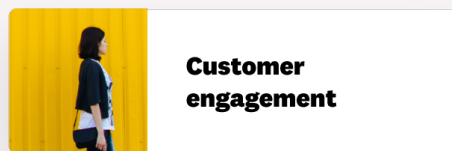
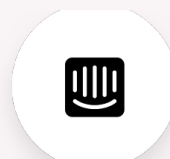
A great way to add automation here is to send a form out to new team members. Once they respond, the appropriate onboarding package will be delivered. If you're going manual, an email list, communication channel, or dedicated shared file storage all can help you sort who has access to what training. Leveraging Zapier with a Google Form that sorts learners into groups is a great way to automate if you have regular new hires.

**Third**, integrate the platforms your team uses most with your training platform to be able to deliver onboarding as they start working. This allows them to directly apply their knowledge and learning through a hands-on approach called just in time training.



An example of this would be a Zapier trigger that delivers sales training inside of Salesforce. This guarantees maximum knowledge retention, a crucial component of effective onboarding. If you're doing it manually, you'll deliver training directly through a platform. A trigger here would be whenever a new hire starts, have an email sent to log in to platforms they'll be using, and attach training content to help them start.

Lastly, plan how frequently you want to deliver the training. For onboarding, we recommend at least daily until they understand their basic day-to-day tools. Scheduling a two-week alert to check-in with them is a great way to assess if they're ready to transition weekly or monthly training. Setting an automation trigger to quiz them and, based on their answer, move them to the next training cadence is a great way to speed this process up.

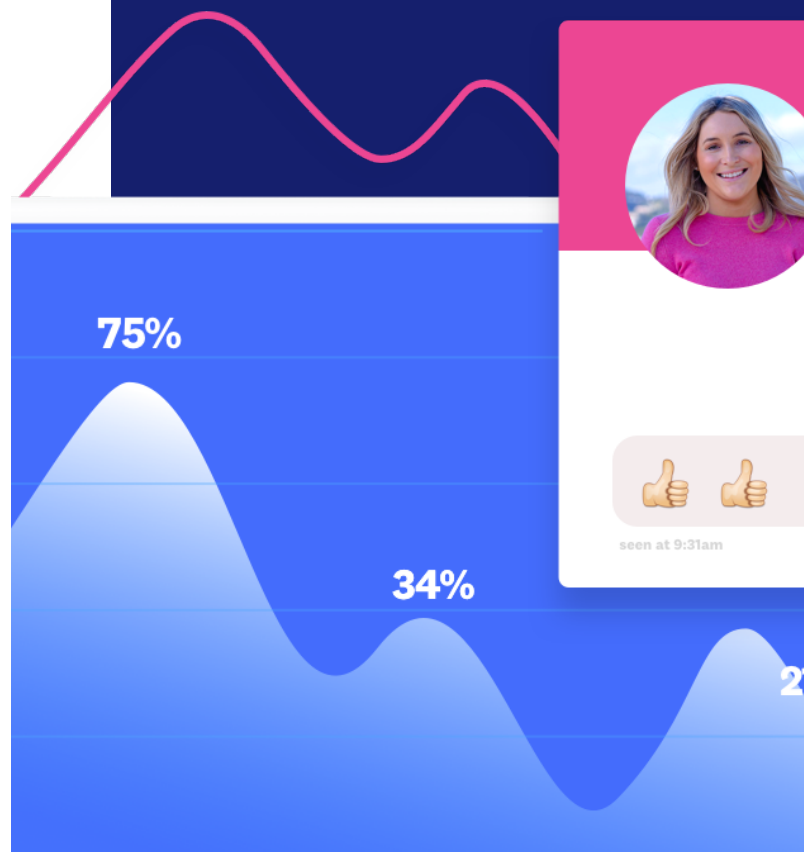


Even if they're confident in what they know, repetition is still helpful to ensure the onboarding training lasts. If you aren't using a training platform, scheduling training delivery reminders on a calendar app will work great to keep you on top of everything. You can have Zapier take a calendar reminder and alert you and the employee when it's time for a "training check-up."

# How to measure your automated onboarding

Measuring your onboarding is the easiest part of automation with an LMS. At the end of the training, set a trigger for assessment to test your team. Give them the option to perform the task in the test so they can apply the knowledge directly. It's important to set clear outcomes onboarding training so you know what to measure in training assessment.

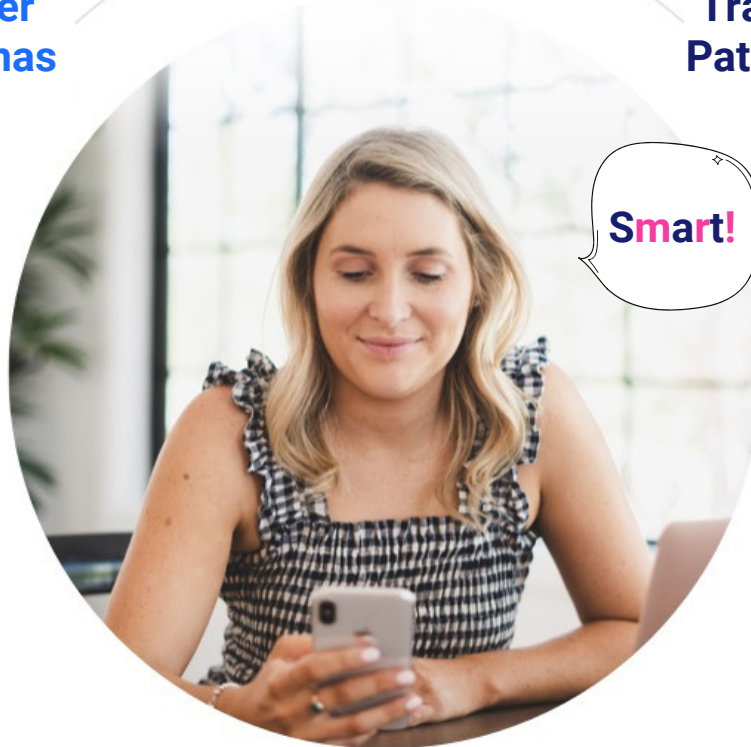
With platforms like Coassemble, you can leverage quizzes to gauge knowledge retention. If you're outside a platform, we recommend poll or quiz functions in platforms you already use. These can then be scheduled in Zapier to send once someone has completed training. Though an LMS can notify exactly when training is completed, manual processes may require additional triggers to send an assessment.



## Assessment Automation

Learner  
Personas

Training  
Pathways



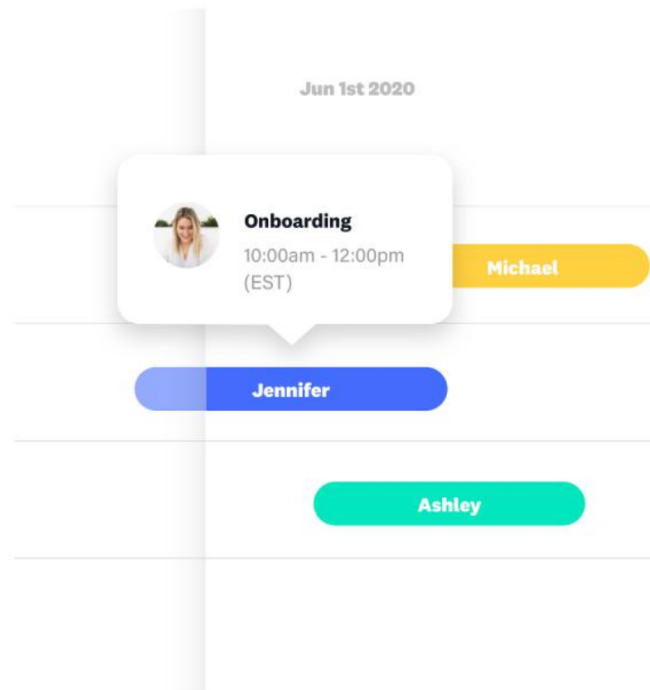
Once you've created assessment procedures, all you have to do is set a weekly report for users and what metrics you're interested in reviewing. For an online training platform, this is a simple toggle on a reporting dashboard. If you're going manual, you'll want to use Zapier and a spreadsheet program to collect and sort data. These can be based on the response, true or false, or grade percentage.

As long as you're measuring the onboarding results, you can analyze how they compare with your outcomes. Automation shouldn't be strictly a one and day (though it's a lot less work than manually delivered and measured training). You want to review regularly to see what works and what needs improvement.

# Other use cases for automation and training

Onboarding is one training example where automation can optimize a process. If you enjoyed this guide and want more ideas on automation, check out some of our favorite use cases below!

**Email Chains/Newsletters:** You can create a trigger to have learners enroll in training associated with an email chain or newsletter. Once they enroll, they'll receive the latest information directly to their email. Fast and simple.



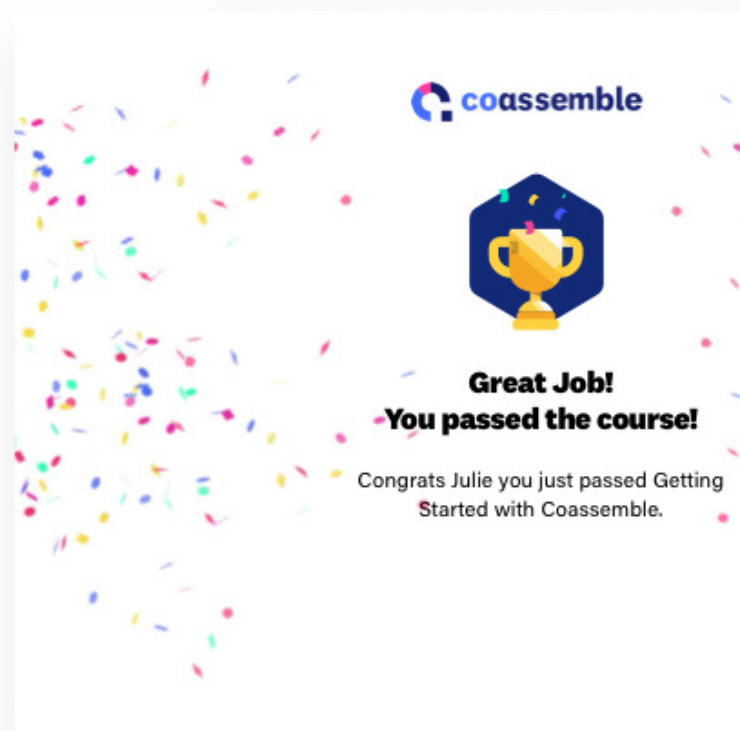
**eCommerce:** Consult or sell training externally to a client group? With integrations to an eCommerce platform like PayPal or Shopify, your customer purchases automatically enroll buyers into a course. And you can add additional triggers for groups, creating an admin account, and sending quick-start guides.

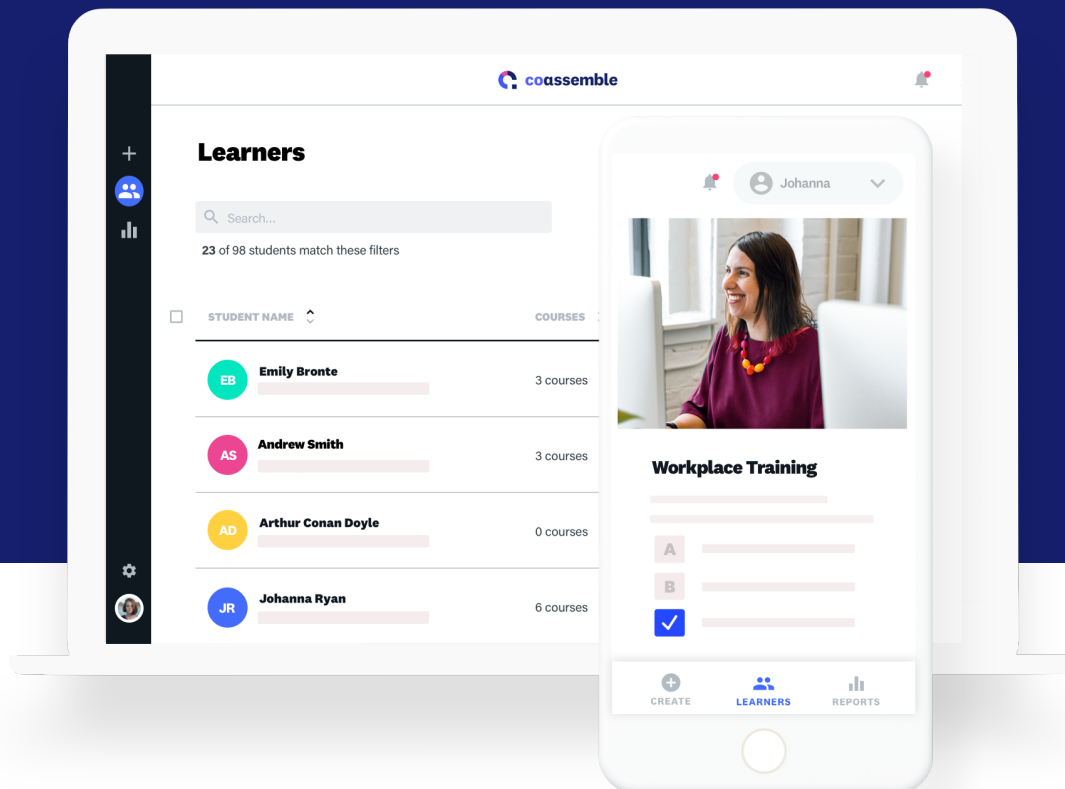


**Form submissions:** Send a form to your team that enrolls each person into a course or group based on their responses.

Though we mention this above, form submissions can be a great automation tool when coupled with training access. Have an always-on form that's accessible and, based on their answer, provides employees with the information they need is a great way to set knowledge free.

**Recognition:** We're really big on recognizing hard work, and automation can help you keep track of celebrating the big (and little) stuff. Record a celebratory video the department head or CEO for when team members complete onboarding. Design custom certificates that are awarded on any training success (maybe throw a little confetti in for fun). Set a delivery trigger for a gift card whenever a team member crushes a training goal. The possibilities are endless.





These are some of our favorite ways to add automation to your training. With a few tweaks, your onboarding process will be a snap for new hires to complete, and you'll have more time to work with them. For even more tips and guides on how to evolve your training, chat with our experts today.

We hope this guide has been helpful for you to think about and start trying new training delivery methods. As you saw above, leveraging tools like Coassemble can making onboarding automation a breeze. For more on how to deliver the best training experience for your team or learn about the latest technology available to accelerate your team's growth, chat with our experts today!




Avg. rating of 4.5 for eLearning Industry and G2 Crowd

Coassemble is a powerful, **award-winning authoring and learning management platform** which allows you to simply share knowledge with your team. Anytime, anyplace. A powerful LMS with a seamless user experience. Coassemble gives you the tools you need to manage your entire training program from a single platform, so you can focus on what really matters - the end learner.

**Unlocked Learning** by Coassemble allows teams to #setknowledgefree – ensuring training is not locked down to one application. Instead, it can be seamlessly integrated into the everyday workflow, ready to go when people need it. Unlocked Learning allows teams to share knowledge in real-time—wherever employees spend their day, in the platforms they know and love.


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