The New Employee 90 Day Training Plan:

How to make your employee a successful, productive member of your business

THE MANUAL ON HOW TO CONNECT, INVEST AND ENROLL YOUR NEW TEAM MEMBER.

The greatest "role" we each hold in the firm is the ability to "connect" with why people are considering hiring us. The first 20 seconds of every first interaction with your firm must communicate kindness, compassion, family and warmth. The training process and the world of business is serious and professional, but if you are interacting with it in a very analytical, factual way, that will be communicated to every person who interacts with your firm. If your interaction is too "loosey goosey," that is also a danger. Clients hire you for your ability to counsel, relate and "hear" them, not for wills or trust documents. No job is about the documents, portfolios or funding. It is about the ability to be human, professional and present. We are in the Personal Services Business. Communicate compassion and the ability to stay in "their" perspective, and that alone will distinguish you in the marketplace (and result in the growth ($$$) of the firm)!

The attitude, tone, facial expression and personality of the firm's team is key to starting the experience the caller/visitor has with the firm - even before any interaction with the attorney.

SPEAKING THE SAME LANGUAGE

There is no small law firm training manual or certification course on what to say, what NOT to say and how to say it when answering the phones or speaking to a client. A client calls in and wants to book an appointment, but the attorney is out all next week attending a training workshop. So we say, "Sorry the attorney is out all next week" and our attorney goes nuts! What did I do, you wonder? Your intentions were good, but the delivery of the message landed on the receiver in a very different, generally negative way.

The skill set is to consider other person's perspective. You say, "I'm sorry, he's out of the office all next week" and the client hears "another attorney on vacation, do they EVER work?" The skill set is to not only clarify what was communicated but also to verify what they "received" or heard. This is the only way to keep expectations clean and avoid unpleasant surprises and complaints.

THE FIRST 90 DAYS TRAINING

We sometimes focus on training our new team members in the technical skills they will need, yet the client interaction, on the phone and in person, is taken for granted. This is the preeminent training tool. Trust the process and invest the time in this role/person now. Your attorney views each of us as a counterpart and depends on our ability to live the role of Front Stage and Back Stage at any given moment. We are their eyes and ears in the business. And we always want to represent the attorney(s) and firm alike in the greatest light, starting from Day One.

When a new employee reports to their first day on the job, the feeling is similar to those of the first day of the school year jitters we all had as kids. And while it's a challenge for the employee to familiarize him or herself quickly with the office, the job responsibilities, new co–workers and more, it's just as important and stressful for their managers. Providing consistent feedback and communication in "real time" from day one is crucial to make the employee a successful and productive member of your business.

Most entrepreneurs are seduced throughout the hiring process, and then forget their role as a coach, mentor and leader. The onboarding process is a crucial element in both individual and organizational development and establishes a foundation for future success.

Maintaining an open–door policy as a trainer and leader must be communicated to every employee, not just the new hire. This radiates that if they have questions, you'll be there for them. Continually remind the new employee of this throughout the first 90–day onboarding process.

Lay the fundamental groundwork for success. Have you ever tried picking up a new skill? Maybe learning new software? You don't become an expert right away. The same goes for your new hires. Breaking down the learning process into 30–day increments allows your employees to focus on learning certain skills at certain times.

Give your new hire a roadmap. Implementing a 30 Day training plan clearly communicates to your employee the onboarding stages. They'll understand where they'll start, where they're going and what they'll learn along the way. Employees value transparency because a clear direction lets them know what's expected of them. Laying out this plan gives them that roadmap.

15 Days. The person responsible for training and managing should check in on the employee's progress toward the goals discussed in orientation. The manager should take the new employee out for lunch or coffee, a casual environment. Help the employee identify and resolve any issues/challenges and therefore, course correct. Conduct an informal verbal survey over lunch, on how things are going thus far (perhaps with a 1–5 point scale, 1 being a minimum explanation and 5 thorough and complete) in the areas of; first 30 day objectives set, motivation from the manager, assimilation, adaptation, mentor, organizational philosophy and understanding what we do and why clients hire us. This is a very simple way to address your onboarding policies throughout the process to see when and how progress is made
At this time, also schedule an informal internal luncheon with the other team members at the end of week three so that the new hire can , ask any questions to the group and feel like part of the team in a less formal setting.

30 Days. This is when your new hire starts the ramping–up process. During these first days, introduce them to the software they'll be using, start them off with small projects and set goals for them to achieve. And most importantly, get them acclimated to the company culture. By the end of 30 days, new hires should have their responsibilities,

THE FIRST 30 DAYS

Training by _____ (there always needs to be a leader)

1. Absolutely everything needs to be documented. Otherwise, when (not if) the team member grows in the firm, quits or is fired, you will be going through this again. The goal is to touch this ONCE and never have to shutdown your people for this process again.

2. **DAY ONE:** Start with the "Business Owner/ Team Mindset Necessary to Create an Extraordinary Practice"webinar. This 1–hour webinar, and you should gather all people who will be involved in the training to view it - this will allow everyone to connect and debrief - and you should give them the tools from "The 8 Keys to an Empowering Conversation Workbook" to support the role.

3. Together, review the "Language Protectors Examples."

4. **DAY ONE afternoon through Day 30:**
   - **A.** Schedule their 30, 0 and 90 Day Employee Review on their calendar in addition to whomever is responsible for being in attendance at their review. Make certain all parties have the Pre–Review homework time calendared as well in preparation for the review.
   - **B.** Dust off your old systems (if applicable) and have your new employee "try them" and see how they can go to the next level and evolve as each call/mail/request comes in. EVERYTHING requires a written system; otherwise we tend to overlook issues and they quickly become tribal knowledge (even how to order lunch).
   - **C.** Start with the front desk/phones. (Every team member needs to know how to operate the front desk, and it's the BEST training tool.) Every call that comes in needs to be tracked and debriefed; every call needs to flow into some category or area of the business. If you don't already have a flowchart of your process, start one now with this new hire.
   - **D.** Have your new employee read every piece of literature: brochures/fliers/etc. Highlight terminology (and ask questions) and create a "Glossary of Terms" - if you don't have this already.

5. **Start with:**

Database/Phones

- **A.** Review the "Phone Permission Standards"
- **B.** Scripts: If you don't have them, after each call you should debrief and ask what questions could/should you task the prospective client to get more information to know where to route the call?
- **C.** Do we use voicemail vs. taking messages? The process HAS to be in writing and crystal clear.
- **D.** Address the use of call logs and how to capture information from clients, and always end the call saying "Is there anything I can do to help/support you right now?"
- **E.** Do the business owners all have designated times carved out in their calendars for returning calls? If not, we highly recommend that - the clients appreciate this and know what they can expect.
- **F.** Intake/interviewing/personal information forms.
- **G.** Protocol for "interrupting" team and attorneys in the firm - what is defined as an emergency and what is not? (See Permission Standards.)
- **H.** After you have tracked all incoming calls for 3–5 days, you can begin typing up a list of how to handle each type of call: where they flow, and which questions to ask to allow people to "tell their story" right away - it is very present for them or they wouldn't have picked up the phone to call your organization.

I. Glossary of terms that we use in the firm - questions to pay attention to, “buzzwords” that will direct where we send the caller - someone has to sit on the phones with the receptionist, and EVERY SINGLE call is a training opportunity and should be documented.

J. Create a binder of all fliers/upcoming workshops and the cross streets of where your office (s) is located, including written directions for how to get to you, with landmarks. Possible incoming call types:
present for them or they wouldn’t have picked up the phone to call your organization.

1. Vendors
2. Personal calls
3. Client Calls
4. Prospective Client calls
5. Tire kickers - people just wanting to shop prices over the phone how to identify them and how to handle them
6. Power partners/referral sources/strategic alliances
7. How to document incoming and outgoing calls

K. Include both short– and long–term projects for the new hire from an early stage. New employees feel an inherent desire to contribute to the business right away. You don't want them working on the big projects though; until they're really up to speed on the way your company works.

45 DAYS

Training by _____

It takes 45 days to get the new employee fully acclimated and acquainted with their new business, and HR industry studies show that a significant amount of staff turnover – as high as 20 percent – typically occurs in the first 45 days of employment. So this is a great time to sit down with the new hire not only to assess their familiarity with the organization and their role but also to see how happy they are. You can assess their performance to this point on some of the shorter projects you assigned while also figuring out where their mind is regarding the bigger picture projects you hired them for. This meeting could go a long way in
retaining the employee.

Make sure you have completed the “30 Day Employee Review” process by this time.

60 DAYS

Training by _____

The next 30 days should involve more collaboration and handing over bigger responsibilities. This is when you should ease off on the training and focus more on the doing. And since your new hire is now an expert on smaller projects, raise the bar and introduce bigger projects and longer–term responsibilities. Not to mention, they’re comfortable with the company culture, so have them collaborate with other team members more.
The tested, proven and guaranteed training is to have him/her shadow the business owner (s) to all strategic alliance meetings, workshops and events for two weeks, without fail. This provides him/her the best perspective of how important these power partner/referral sources are in growing the business.
At this point, engage the new employee by communicating and asking how things are going and by taking them to lunch or coffee, preferably out of the office.
Conduct 60 Day Employee Review.

90 DAYS

Training by _____

Typically the amount of time it takes for an employee to fully be accepted into an organization, the ninety–day mark is when you should start seeing serious results from your new hire. The last 30 days is all about removing the training wheels. As your employee is taking on more responsibilities and accomplishing bigger tasks, they are now accountable for their own work. Your new hire is now able to tackle projects with limited guidance from you, and they're now equipped with bigger responsibilities. And now you can fully move onto your greener pastures.
Conduct 90 Day Employee Review.
New Employee should now attend your Quarterly Company Full Day Internal Retreat. Make certain your retreat has some element of a informal—coffee and donuts before getting started, a working lunch and possibly a brief "happy hour" at the end to celebrate your hard work. A retreat will bring the entire team together and encourage a team atmosphere. The new employee by this point should no longer feel like the new kid on the block, they are now part of the fabric of your culture.

EXAMPLE:

GOALS

BY: 30 DAYS

- **Learn the tools:** content management system
- **Become comfortable with the company's culture:** weekly lunch with the team, attend company values and history training
- **Learn the company product:** attend 2 product demos
- **Complete a small project:** Learn social media platforms & begin monitoring online conversations
- **Achieve a small goal:** learn & adopt company's brand voice

BY: 60 DAYS

- **Complete a big project:** finalize conference–planning activities
- **Take on longer-term responsibilities:** Learn metrics tracking tools & begin weekly analytics measurements
- **Work with other teams:** collaborate with PR team to pitch conference speaking oppurtunities
- **Get used to routing processes:** weekly meeting, metrics. & daily tasks

BY: 90 DAYS

- **Complete a project independently:** create a monthly webinar calendar & coordinate webinar development and execution plan
- **Take on bigger responsibilities:** take over case study development
- **Be able to juggle all responsibilities:** manage responsibilities via the marketing calendar

If you take the time, energy and put the effort toward properly training in the first place, your Director of First Impressions will live and breathe not only being the face of the firm's systems, they will also begin making the firm money by the end of their 90 days.

"In life you get 1 of 2 things, the results you want or the reasons why you couldn't get them."