Onboarding Consulting Overview
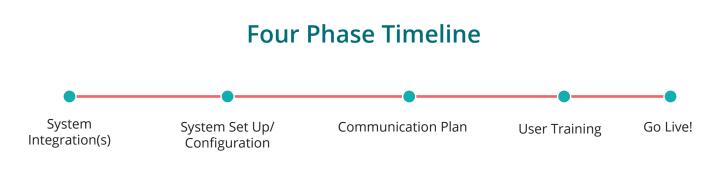
Onboarding Consulting Overview

The WorkDove platform can be implemented quickly with our built-in workflows and templates without onboarding consulting services. However, many customers seek our expertise to ensure the software is fully utilized since software by itself does not create or sustain a performance culture.

"Help Me Do It" Implementation

An Onboarding Consultant will guide you through the process of implementing performance management best practices as you roll out the software to your organization. Guided implementation is provided for up to 10 hours over a 90-day period.

"Do It For Me" Implementation

If your HR and operations teams are already stretched, you may find the "Do it for Me" onboarding option very helpful. We will take a more hands-on approach in rolling out the software to your organization. "The Do it for Me" option provides up to 25 hours over the first 12 months.

Four Phase Timeline

System Integration(s) — System Set Up/ Configuration — Communication Plan — User Training — Go Live!

*Typically over 30-90 days

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Sample Agenda

1. **Expectations for the Performance Management Program – Why do this? Why now?**
   a. WorkDove Background, Companies
   b. WorkDove Overview

2. **Company Purpose & Goals (Review Prework)**

3. **Determine Software Features for Initial Rollout**
   a. 9-Box
   b. Check-Ins
   c. Performance Reviews
   d. Goals
   e. 360° Feedback
   f. Calendar
   g. Learn
   h. Survey Builder
   i. Recognition
   j. Agendas

4. **Performance Coaching & Evaluation**
   a. Performance Objectives
   b. Core Values / Workplace Behaviors

5. **Performance Management Workflows**
   a. Frequency
   b. Secondary Approval
   c. Compensation Management

6. **Reports & Leadership Decisions**

7. **Expectations & Accountability of Leaders/Managers**

8. **Implementation Plan**

What Core Values are necessary to fulfill our Purpose?

What organizational goals should we share with everyone?

What success metrics will be evaluated for the performance management program?

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Implementation Plan

Using the Project Plan below as a customizable template, a WorkDove Coach will guide you in setting up the WorkDove system from start to launch in order to satisfy the goals of the organization and navigate the change management effectively.

WorkDove Implementation Plan				
Action	**Who**	**Due**	**Status**	**Notes**
Prepping for Pilot or Enterprise Roll-Out (Onboarding Consulting)				
Company Tab				
Purpose/Mission/ Vision				
Core Values Library				
Documents				
People				
Integration or CSV Import				
Job Descriptions				
Settings (Admin)				
Engage				
Check-Ins (Yes or No)				
Layout of Template (Questions, Core Values, Performance Objectives)				
Assignment (Notifications and Frequency)				
Recognition (Yes or No)				
What is your goal?				
360 Feedback (Yes or No)				
Internal and/or External				
Request and/or Provide				

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WorkDove Implementation Plan				
Action	**Who**	**Due**	**Status**	**Notes**
Layout of template(s) (Questions, Core Values, Performance Objectives)				
Assignment (How are we using this?)				
Performance Reviews (Yes or No)				
Layout of template(s) (Questions, Core Values, Performance Objectives)				
Assignment (Notifications and Frequency)				
Goal Management (Yes or No)				
What is the desired end result with using Goals?				
Learn				
How are you going to use the Learn Library?				
Assignment (Status of Completion)				
Training				
How do you want to train your team?				
Manager Sessions (timing, size of groups, remote, onsite, etc.)				
Employee Sessions (timing, size of groups, remote, onsite, etc.)				
Communication				
Letter from the Leadership - What's changing and why				
Town Hall meeting/ launch call with WorkDove Team (the why again, timeline, training plan)				
Welcome Email Launching the System				
Training Invites sent				
Post Work				

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WorkDove Implementation Plan				
Action	**Who**	**Due**	**Status**	**Notes**
Pilot Team Survey				
Leadership Debrief - What do we change?				
Enterprise Training & Communication				
Manager Sessions (timing, size of groups, remote, onsite, etc.)				
Employee Sessions (timing, size of groups, remote, onsite, etc.)				
Communication				
Letter from the Leadership - What's changing and why				
Town Hall meeting/ launch call with PC Team (they why again, timeline, training plan)				
Welcome Email Launching the System				
Training Invites sent				