

TOTARA: ONBOARDING WITH CATALYST

*This is a transcript of a video
on the Totara Academy*



INTRODUCTION.

I'm Ella Tugwell, I'm the Head of Internal Services at Catalyst and part of my role is people and performance related stuff.

I'm Sam Taylor. I'm a Senior eLearning Consultant at Catalyst and I help our clients understand their platforms better. I host monthly meetings with them, but I also provide support to our developers and technical staff in how the platform are used.

What does Catalyst do?

At Catalyst IT Europe we provide open source solutions to the education sector which includes site hosting and advising on best practice.

What are some of the challenges you face when it comes to onboarding?

Yeah, so some of the challenges that we have are a lot more remote support. So a lot of our employees are now remote even if they are local. We have a little bit more of a hybrid onboarding practice. There's also a diverse skill set. So some people may be a lot more junior than others, and we try and tailor a lot of the inductions for the roles as well. So somebody who would come and work with me in the admin side, they won't necessarily need all the technical stuff that somebody like a dev or a DevOps sys admin person would need.

Try not to overload the new starters with lots of new and often bespoke systems and processes all at once as well. So we try and spread that out across the induction process.

How do you get new starters into your system?

We don't do it manually. Normally, when a new starter is onboarded, part of the setup is they'll be added to a user package which provides access to a suite of tools such as Totara and other internal systems.

What does the first interaction with the system look like to the user?

This is a new starter. So it's an account that we created for this purpose. His name is Cat Limited and here's his profile picture and as a new starter, I can see all my required learning. So we use a number of audiences to enroll learners onto courses. So we have a new starter audience and what we use that for is the new starter induction program here and what this is a featured links tile and basically, if you are part of the new starter induction, you see this tile, once you complete it, you move into a different audience and you no longer see that tile, which is quite handy.

We also have the courses down the middle, so a lot of these courses you are enrolled because you are part of the Catalyst audience.

So this is purely for active Catalyst staff. So all staff, so it doesn't include any of the demo accounts and tester accounts and stuff that we have and admin accounts as well. So it's really, really good for reporting to make sure that the data in our reports is purely based on audience, and then across the top, we have some quick links that we have provided to all staff.

So for example there's the 'Catalyst Policy Log'. So this is where all the internal policies are listed and Ella uses this to track, who's looked at it and tick the box and say that they've read it and understood it and how it applies. But also a way for Ella to broadcast





changes as well as quick links to monthly performance activities resources and playlists. And then a couple of the other social activities that we have that we're gonna look at a bit later.

So as a new starter, I log in, I can see my learner I can go straight to it or I can go straight to the induction program. So just to say that when a new starter starts Catalyst, Ella does spend some time with them going over some of the systems, but also she does log in with them and give them a quick tour of the program, and one-to-one to ask questions.

Just to give an idea of the induction program, so if I click on this, you can see what I'm expected to complete on day one, day two, and day three, going into week two. But also, just to point out that this is a mixture of the like normal, you know, you do these courses just once, but also courses that are combined as part of a certification.

And if I go back to the dashboard, I can see how they've been separated. So I've got my information security certificate here. So these are all the courses within that. They're actually also part of the induction program. So I do actually complete them as part of the induction program.

So going back to the program, we have this main course here that sits alongside all these shorter courses. So if I launch that one, I have a number of activities to complete on my first day. So I have a guide. So it isn't always firefighting at Catalyst. I promise you, but I can go in and I can see that to complete this one course, I have eight others to complete and I also have a number of tasks in this course as well. So just giving you an idea, we have a fun getting to know you checklist, just to say, I know who my buddy is.

So everybody at Catalyst gets assigned a buddy to mentor them through their first year at Catalyst.

I've had a meeting with my head of internal services. Ella, I know what team I'm in, all these little things to make sure that I'm on the right track. Again, more information about the induction courses that they have to complete as well as a little book about working here and some other useful links. Other things you do as part of your onboarding as well is you have a product demo. This is all done via seminar tool, so you can go in and book the next product demo, which is with me normally. So you look at all the different platforms that we support and our clients and how that works. But also we have these other activities along the top here. And I just want to give you an idea of what we do.

As part of onboarding, we do monthly check-ins. So you do monthly check-ins in your first six months, but you also continue them once you've completed your onboarding. And just to give you an idea what that looks like. You have a form to fill in. Here's one I filled in earlier. We have a section on wellbeing about how you currently are coping. We talk about things like stress and mental health. And the good thing about this is that the report that's generated from this, Ella has a quick link to which she'll show you in a bit, so I can go in, I can click 'Complete my form'. So here's what I did earlier. And I submit it.

I can then go into the next section. So here's when I filled in earlier again. I can go in and if I've got any competencies that need reviewing or goals, I can add them here and then submit. And then finally, when it actually comes to the one to one with my line manager. So in this case, this person's line manager is Ella. She can go in and complete this section.



And the other things that happen when people are first introduced to Totara is that Ella shows them their competencies. And she goes through all the competency frameworks that apply to them. So again, these are audience driven. This is just as I said, demonstration. So it's not as in depth as it could be, but just to give you an idea of some of the competencies that could be assigned.

So everybody at Catalyst gets given some competencies on the soft skills about teamwork and communication, etc. And that's driven by the Catalyst staff audience, but here you can see this person's being assigned competencies based on their role. So for example if I want to go in and let's look at Matomo, so if I talk about my competency. You can see that I've already completed basic training. I can go in and boost my rating if I wanted to, to say 'I'm actually approaching now.' And then when the scheduled task happens, it gets updated.

Do you provide any social learning in your onboarding experience?

Obviously this platform it has a lot of content which a learner completes in their allocated time when it comes to their onboarding. But we do use the platform for live events and for social events as well. So across the top, you can see the session called quick links. So these are created using tiles in the featured links block.

So you can see here, I have a link to resources and playlists. So for example, if I was doing some training, I can go into my resources and playlists. This is using Totara Engage. I can go in, I can create a resource and then I can share it to my workspace if I need

to, or want to which when you use it, when you do that, you can generate a notification that gets to everybody's inboxes in the workspace, which is quite a good way of getting them back in.

We also have Town Halls, these are quarterly meetings where everybody gets together, listens to our MD to talk about what's happened in the last three months. What's the plan for the next three months. Officially welcome all new staff discuss finances, all those sorts of wonderful things. Obviously during lockdown, it couldn't happen in person. So we've moved it online. Now things are open. We still do it as a hybrid. So some staff are still in the office where a lot of us are still online. So just to give you an idea, just click on it. It's a course tile. It takes you straight to the course, as you can see, this is when our next one happens.

And because it's all ran using the seminar tool, when the administrator sets up the next session, the email goes to everybody. It gets added to their calendar. You get the notifications the day before, but everything is driven via our Totara site.

Other social things that we do with it. We have staff nominations, this is where we can nominate our colleagues for being absolutely amazing. It could be one month somebody really, really helped me with a project or I was really, really stuck and they stepped in to, and lend me a hand and I can go in and say that person deserves my nomination, I can go in, I can select my colleague from a dropdown list.

So Ella populates this, I can say why I've chosen them and then given some feedback and some evidence if needed. So this is using the feedback tool in Totara. And likewise, we've got another one here for code reviews, because we are a tech company.

So we have developers that create code and they need feedback.

And then the other thing we do with it socially, the third main thing that we do with it is we have our weekly tech talks. So every week somebody puts himself forward to do a 20 minute lunchtime talk and we use Totara for that as well. So here's one we did earlier. So in here you can see what the next talk's gonna be.

Then the next this session, what it's about. so this one's about something technical. So one of our technical colleagues are going to present. What it does is, it gets set up, it gets emailed to your inbox. It gets added to your calendar and we link the recordings, the past recordings on here as well.

So it's a chance for everyone to get together. Watch one of their peers do a short presentation, do a Q&A whilst we're having lunch. And we can always go back and look at the video if we need to.

How do you make new starters come back to the system?

As Sam's sort of shown, we don't just use it as a one off and then leave them to forget about the system. A lot of the the quarterly meetings we have, the emails, notifications that go out are monthly and one to ones, are all driven by email notification as well, but also the managers will be pushing the employee to go into here and fill in their catch up forms.

Through induction checklist that we have that is on a third party app, it will keep driving you back into the induction course. There's that, there's the managers, there's the seminars and then the email notifications. So we try it and drive as much traffic to the system throughout their entire employment with Catalyst.

How do you report on your employees onboarding experience?

This is what I would see as a manager of the Cat Limited user. So I'm set up in the back end of Totara and as the manager for the user. So I got here, I'm also set up as the appraiser for everybody within Catalyst, so I can manage and see all of the reporting for any courses that are ongoing at the moment.

You can see this list on this side here and I've got the demo HR and Site Admin just for the purpose of the webinar here. You can see that the list of users would be here. I do have additional ones, but I've just closed them down just for data protection, really. But here is the new start induction program.

You can see that the status is not completed and this is where they are. If this gets to near the due date and the progress bar is still down here, then there's something that's gone wrong within the induction process and then I can have that conversation with the buddy, the manager or the new starter, but I would normally go to the buddy and the manager first to kind of push them along.

It may be that there's an issue with our course or that they just haven't gone in and, and completed it. And they've got stuck on something. But I will also be tracking this throughout their induction. You can also see that I have additional reports up here as well.



The monthly checking responses the wellbeing scores, if people are putting lower scores within their wellbeing on their checklist, I can have a look at that and we can see if there's an action plan that's that's needed. And the results of the staff nominations are on here as well.

Overall, how has Totara helped Catalyst onboard new starters?

How has this helped Catalyst? So I think it fully integrates the employee more.

We're ensuring that they're talking to more than just one team member with the checklist that they have initially with the induction course. They have to seek answers from others, or just go and introduce himself or have introductions with other teams. I think that's really important with the remote aspect as well.

We have compliance training that is mandatory, so we can ensure that they are actually understanding the topics by going through the courses. And if there's any questions, there's a section for feedback. That gets driven annually as well. So it's not just left. It is revisited.

I think there's quite a big impact on the social aspect and the wellbeing because we're openly discussing it and it's recorded. We try to keep that at high scores and then also ensuring that people aren't left behind because they're remote. I've had some feedback from recent new joiners regarding the induction program and they all commented on how organised process is. I've had some people say 'it's the most structured induction that we've ever had', which is really nice to hear because there's nothing worse than joining a company and not really having an understanding of what you're meant to be doing.

It's showing that we care about their personal development, we do drive that. We do make sure that people feel like they are wanted at Catalyst. I think it's a really hot topic and a good thing to do.

And any changes the policies that quickly broadcasted due to the announcement section within that policy log course as well. So everybody is well communicated to and have somewhere to look back on it and it doesn't go away. It's always there. So if there is something that they were unsure of, they can always go back and check.

End

