



**Wake Up Eager Workforce Podcast, Episode 82
Onboarding with TriMetrix: Why and How It Works
-- Produced By Suzie Price**

Transcript

www.pricelessprofessional.com/onboardingwithtrimetrix

[00:00:00] If you have great onboarding, according to Society Human Resource Management, you can increase productivity of new hires by 82%. When they interviewed employees about their onboarding experience, only 12% said that their employer did a good job. Many believe that the onboarding process represents just one small piece of an employee's journey. So, you may think that it's just one piece of the puzzle, but it's a big piece because it is an influencer of the employees' perceptions of the organization. And Gallup has repeatedly found every interaction affects the strength of the employee to the organization. So, their first interaction with you all, with your company matters, and they're making judgments and forming opinions based on their experience.

[00:00:46] Welcome to the Wake Up Eager Workforce Podcast, a show designed for leaders, trainers and consultants who are responsible for employee selection and professional development. Each episode is packed full with insider tips, best practices, expert interviews and inspiration. Please welcome the host who is helping leaders, trainers and consultants everywhere, Suzie Price.

[00:01:12] Hi there. My name is Suzie Price and I'm glad to be here with you today on episode number 82, Onboarding with TriMetrix. I am the founder of Priceless Professional Development. We've been in business since 2004 and the creator of the Wake Up Eager Workforce podcast. Our focus on this podcast and in the business is to help leaders make better decisions about people. And the main tool that we use is the TriMetrix assessment, which is a tri-modal tool, which measures three views using three different sciences, how we like to communicate, what we're motivated by and what is under the hood or how we think and make decisions, there are like 20 plus personal skills that we measure. And so today we are talking about that tool and how it can be used with TriMetrix. So, Onboarding with TriMetrix is what we're doing today.

[00:02:11] We recently did a podcast on Hiring with TriMetrix and upcoming, you'll have opportunities to review some podcasts on team building with TriMetrix, coaching with TriMetrix, conflict management with TriMetrix and mentoring with TriMetrix.

[00:02:27] So today's episode you can find all the show notes and all the links, so the things we talk about, you'll find you may be listening to this audio or you may be listening video, we don't always do video, but if you want to see the video and get all the links, you can go to pricelessprofessional.com/onboardingwithtrimetrix, onboarding with TriMetrix, that's all one word and it's all lowercase, pricelessprofessional.com/onboardingwithtrimetrix.

[00:02:57] So that's how you get all the show notes or share this podcast with anyone. Or you can also look at all of our other episodes, go to our directory at wakeupeagerworkforce.com, wakeupeagerworkforce.com.

[00:03:12] So let's go ahead, I'm going to go ahead and share my screen and pull that up on our beautiful Zoom tool. What did we ever do when we didn't have Zoom, right? So, what are we talking about today? We're talking about onboarding. Who's going to benefit? Anybody interested in improving the process, if you don't have a process or you just want to make your process better, this is episode is for you. And I would assume that the next two items, reducing turnover and improving new higher productivity would always be a goal of every leader. So, we will cover that today.

[00:03:46] I want to remind you of why onboarding matters. Many of you know, "Oh yeah, should I do something to make sure we keep them," but maybe sometimes we forget how much impact the onboarding process has. So, you basically get, according to research, 90 days to prove that you're a company that they want to stay with. So, and the faster that they feel welcome and prepared, the faster they can contribute and feel good about their contribution and the more likely they will stay.

[00:04:16] So those first 90 days matter. We're going to talk about how to use TriMetrix and onboarding. That's what I titled this about, right? So that makes sense. We give you four easy steps, and we go through it step-by-step, including an agenda, a worksheet that you can use to follow up, to remember everything we've covered. And we have an onboarding agenda that outlines the three types of meetings that a manager would have. So just imagine a new hire has three meetings with their manager in their first 90 days and they have an assessment that's all about them. And then the manager or their leader is talking to them about who they are, what they need, what they want, what their strengths are, checking in to see if they have any questions, and make a huge difference in the onboarding process, and therefore the retention and the ability for them to be successful. We have a bunch of development tools, so I'll show you those and how you can use them. They're all easily available to our clients and so you can use these tools to grow and grow employees.

[00:05:24] We have an image that we use, it's the employee lifecycle. Some folks use TriMetrix for hiring, some people use it for development, but the TriMetrix can be used throughout the employee lifecycle. It's a big circle and you see hiring at the top. That's a start. You use it for hiring, so you make sure you have a good fit. Somebody is a fit for the role so they can do not only by their background, but their communication style and their drivers what they're most interested in and what's under the hood, the horsepower, their top personal skills all match with the job needs. So, your likelihood of them being successful in the job is higher and then you carry it over to onboarding.

[00:06:03] And then if you're doing team meetings, you use the same data. You don't have the employee complete the assessment again, you use the same data, create a different kind of report from the information you have for team building. You can use it for leadership development, succession planning and conflict resolution. So, it is the employee lifecycle and that's one reason I've stuck with TriMetrix for so long because of that capability.

[00:06:26] We did, here's the link to the episode with Hiring with TriMetrix, which was episode 81, you can go read the show notes. We always have a transcript and then we summarize and timestamp everything. So, you can go to specific segments if you want,



pricelessprofessional.com/hiringwithtrimetrix, hiring with TriMetrix, at pricelessprofessional.com/hiringwithtrimetrix, that's all lowercase, in one word, you can find that.

[00:06:55] So let's look at this, you've hired the best, you've used TriMetrix, you've created a good fit. You spend a lot of time, money and effort to find the right people. Even in today, it's harder probably than it's ever been to get the right people in the right seats. Now, you want to use the coaching report. 50% of employees, according to research, voluntarily leave their role after two years. So, either a new hire or somebody's been around a year, but they're essential. 50%, that's a high percentage. So how can we how can we change that and reduce the risk? There's always a risk that people are going to leave, that people aren't going to match, even if you do a great job in hiring. But we need to, we need to do more to reduce that risk. SHRM, I have some information from the Society of Human Resource Management, some recent research for 2022, this is being recorded in 2023. And then from the Gallup Organization, they're known for workplace research, and they always do a state of the American Workplace report. So, these are the stats, and I'm getting ready to share with you. The one about, 50% leave within two years is from the Gallup Organization. Half of all senior outside hires fail within 18 months in a new position. That's dramatic. Half of all senior outside hires fail within 18 months in a new position. So, they were good in another location because they knew the dynamics and the culture, but maybe they came over to the new, they don't get enough support. There could be many, many reasons of why they don't work out, but they don't.

[00:08:34] And so we want to, we want to use some of this so that great onboarding makes a difference. If you have great onboarding according to Society of Human Resource Management, you can increase productivity of new hires by 82%, huge percentage. You can increase retention. So, you can take it down from the high turnover to increased retention by 70% of the challenges, though, when they interviewed employees about their onboarding experience, only 12% said that their employer did a good job. So, employers are taking a stab at it. Some are of doing a good, great job, but only 12% say, "Hey, that worked." It's a huge missed opportunity, according to some of their notes. You're going to read what it says here, "Many believe that the onboarding process represents just one small piece of an employee's journey." So, you may think that it's just one piece of the puzzle, but it's a big piece because it is an influencer of the employees' perceptions of the organization. And Gallup has repeatedly found every interaction affects the strength of the employee to the organization. So, their first interaction with you all, with your company matters, and they're making judgments and forming opinions based on their experience.

[00:09:48] So initial impressions matter. So, they say great onboarding increases productivity by 82% and increases retention by 70%. What is great? Well, let's look at some things that aren't great that are happening. And we have an image here on the video. You'll see it. He's on a ship and he's waving a sign that says, "Help me, S.O.S.." And this is one employees' experience that was documented in some of the research that I was reading, is the orientation day went on, "It went from 8:00am to 6:00pm. There were no breaks. They had lunch brought in. I felt like I was held captive. Then we had homework to do in the evening." So, the employees' impression of the organization on the first day is this place is a grind. There's a lot to do with a new hire, but unfortunately the onboarding process is primarily about process and paperwork, and there are, it's 50% of that is processed and paperwork as opposed to starting out with connecting and



getting to know the employee or including that in the mix. And they said that on average there are 41 administrative tasks that are assigned to the new hire. And it's different, it's different from when I started out, the way the culture is today and the way, what employees inspect today. I mean, things are supposed to evolve and change. Well, here's where it is today, the relationship with the employer is different, they see it through a different lens. I mean, they're less inclined to stay with the job because they get a paycheck.

[00:11:16] Employees today want a certain experience, and if they don't get that experience, they're willing to look elsewhere much more independent than maybe seen in the past. And their employees are consumers of the workplace and they're drawn to brands they can stick with and even advocate for. And they want brands that put connection before persuasion, brands that value who they are. And you can do that and be productive and get things done and have process. What happens is people leave the connection out and then employees leave as opposed to making sure connection is as much as, is more important than the action and the process. But doesn't mean that action and process aren't important. Just kind of prioritize them a little bit differently. Still get the process and the actions done but connect first and you'll get a different result. And there's some scientific information and study through some of the work that I do around Axiology that shows this hierarchy makes a difference. People before tasks, before systems, creates a powerful way of thinking and way of living that creates what we're looking for here, which is an engaged, productive person in the role.

[00:12:36] And we have in the next, is another example of someone who started and said, I can't wait to leave. And it's a funny picture because it's a lady in a suit. And if you're listening to this, she's in a suit, she's smiling like she's so happy to be there. And then the statement on the side says, "I'm quitting to pursue my dream of not working here." It makes me laugh every time I see it. But here's another typical employee experience where an employee came onboard and there was a lot of red tape, and they didn't have access to things they needed for six weeks. So, I wonder how long that employee stayed. I had something similar; it was many years ago. I was working for a large international software firm, which was, made it even worse that the technology was. and all set up and I didn't get what I needed and I didn't stay past two years actually. So that kind of ties together, just a reminder that it is expensive when people turn over. So, for example, the firm that I was with, there was a lot of work that went into getting me onboard, and then I didn't have what I needed to be successful. And it was probably six weeks similar to that one. Probably why I was drawn to that. And you were trying to put on a brave face, but it's like you start doubting the organization and feeling frustrated at the start, which isn't good. And it's expensive, 67% of the costs of turnover are related to reduced productivity, soft costs, interview time loss, knowledge loss, possibility, loss, productivity. And then a third of the costs are related to the recruiting and the background checks, drug screens and so on. They say, Topgrading always reminds us that it's one and one half to eight times someone's salary when there is a turnover. So, one and one half to eight times depending on the impact of their role on others, the number to eight would be like the CEO or a top executive role, or maybe a salesperson who touches a lot of people. So. it's expensive.

[00:14:30] Here's another new hire experience. It said, "Basically the first day was great, but on the second, everyone, including my manager, was too busy to meet with me." And so, as a reminder, people are deciding whether they're going to stay in the first 90 days and that they



leave often, many large groups leave before two years. And when employees don't get the experience they are promised, they make their unhappiness known. This is a great reminder. And we do see evidence of this with stores and other types of tools, or just social media in general.

[00:15:04] So unhappiness gets known in obvious and not so obvious ways. I mean, they might be just looking for a new job and being less productive, or they may become actively disengaged, which we don't want that, no brand big or small wants that, meaning they get they have such a bad experience, that they take deliberate steps to undermine the organization's progress. So great onboarding increases retention and productivity. Bad onboarding causes all kinds of potential problems turnover, loss of productivity and potential active disengagement and campaigning against the company.

[00:15:42] So how do you reduce the risk? I've kind of done a little bit of a sales job on you around onboarding and how important it is and just kind of bringing it to the forefront if it has lost its place. There is, we use TriMetrix as one of the tools, and it's because TriMetrix helps us see who the new hire is. And here's some insights. You'll see an image, if you're watching the video of New Hire Harry, you can see where with the assessment science you're learning about Harry's, how he's going to respond to challenges, how he likes to influence, what pace he likes to work at, and how he responds to rules and procedures. So, you see some examples there with people. He's a gregarious and sociable mixer. He's good at inspiring others, but he may misjudge the abilities of others. How does he like to work with their manager? He likes a participative manager. He's driven by power and status. So, all of those things would help you understand how to manage and communicate with Harry. And so having, when you're bringing on someone new, you aren't just acclimating to them, them to the job, but you and your team are acclimating to them as a person.

[00:16:55] And so having a broad understanding of their work style and what they're interested in and what their top strengths are can save many months and many headaches on the job. As you think about how long it would take for you to get, as I show you some additional New Hire Harry insight from TriMetrix, think how long it would take you to understand this about New Hire Harry without the report and this is this next one is New Hire Harry and the communication tips what makes New Hire Harry's successful communication, provides ideas for action to find problems in writing, clarify parameters in writing, use a motivating approach. So, we talk about situational leadership, "How do I adapt my style for the needs of this employee so that they can be successful?" The Don'ts, "Don't leave decisions in the air, don't drive on about facts, don't be dictatorial." So, you get very specific things to Harry. It's not about catering to someone, it's about reducing unnecessary friction and frustration for the individual and for the team so that you can understand, because everybody has their own list of do's and don'ts. And ultimately what you want to do is increase performance and satisfaction.

[00:18:07] Lastly, we're looking at Harry's unpacking his blind spots. And according to the assessment, we all have blind spots, so our strengths usually overused. It shows us our natural tendencies and then it can show when we might overuse them. And we all, like I said, have them. So, if you can figure out maybe one or two, that might be important in the current role as they get started, have a discussion about them according to the role, pick one or two to pay



attention to so that you can help someone manage their blind spots. A good leader understands the employees' strengths but understands where they might dig their own hole or run the car off the road. Help them work through that and get the support they need to not step in that hole.

[00:18:52] So some of them has difficulty listening to feedback. They overfocus on self and his own needs can disclose their agenda to the wrong people. So, you can just help Harry understand what those are and it can come about in the way that we talk about it in this onboarding agenda that we're going to share to you, but increases productivity for quality of life for Harry, quality productivity on the job and helps personal and professional growth and understanding because we all have blind spots. And so, one thing I always say about the assessment is the assessment lists them and they might not all still be true for you today. So, we don't assume that everything listed in the assessment is true for Harry, but we can have a conversation about it and Harry can help us understand which one might have an impact and then help Harry manage that.

[00:19:42] So we want people to say, "It's good to be here. I'm happy to be here, not only on that first day, but on their 90th day and then two years." And so, the Gallup organization gives us insight into what we need to help people stay, stay productive, have good customer service scores and be committed. And basically, what they say, here's what people want from you, it's not the paperwork, it's not the process and the administrative details that happen in onboarding, they want connection first. People want to know, and this is the Google and Gallup engagement survey, and its proven time and time again is powerful. Does my supervisor or someone at work seem to care about me as a person? Does someone at work encourage my development? Does someone at work talk to me about my progress? Have I had opportunities to learn and grow? So, this is how you help someone stay on their job and contribute their talents generously. And it all starts with onboarding.

[00:20:41] And so I made my case. I hope you're bought in. Now I want to show you the four steps that we use in the onboarding with TriMetrix process. And again, the show notes for all of this is at pricelessprofessional.com/onboardingwithtrimetrix, all lowercase.

[00:20:58] And there's four steps, the first is the new hire TriMetrix coaching report. The second step is you send the new hire email. I've got a sample email I'm going to show you with the report and this pre-work that goes along with that. And then the third step is you meet with the new hire, and you follow the agenda. And as I've mentioned previously, there are three meetings that we suggest you have over a period of time, and these are get to know you meetings, these are how is it going type meetings. And then the fourth step is just share resources and check in often. And sharing the resources is just one of the things is my managers encouraged my development.

[00:21:34] So, there's a bunch of resources that we've created that you can use and share with the new hire. So those are the four steps. Let's just go through it together. As I mentioned, there's a time saver onboarding and coaching document. It's one page, two sided. It has links to everything that I'm talking about today. So, you can go find that again on our website at pricelessprofessional.com/onboardingwithtrimetrix. So, everything I'm talking about is in this onboarding reference document, I call it a time saver because it's taking this training and this discussion in this podcast with you. So, there's what we open with in that document. And what



I'm showing on the screen now is a reminder about employee engagement research, that employees respond to knowing that their manager cares about them, that their strengths are focused on, that they get growth and development opportunities in organizations that do that have less turnover and higher commitment.

[00:22:35] And we provide a streamlined coaching report. So, some of the coaching reports that we have with TriMetrix can be very long and big and it can be intimidating to a hiring manager because there's graphs and like, "Oh, what if they asked me things that I don't know how to explain?" So, what we've done is created a coaching report that takes all of that out. So, there are no graphs. I mean, we can have the graphs if you're somebody who's seasoned with the assessment, but they're all just verbiage. And then we also, like I said, I'm going to show you the how you have the meeting and what pages to look at. And what I also say is use this process, take your TriMetrix report, use the streamlined coaching report on yourself and read it through and maybe go to your manager and say, or your spouse or a friend or a colleague and say, "Hey, let's go through this together," practice this first and it'll feel more comfortable, and you'll see how easy it is. And just reminder that the assessments are always less than 30% of any decision. So, we to remember the assessment is going to tell us a lot about an individual, how they like to drive, like that's how they like to communicate, interact, what puts gas in their tank, what's their most interested in. And then it's what's under the hood, horsepower, which is those 20, 20 plus personal skills. So that will tell you a lot, but it's still less than 30%. You've got background and experience. They've got things that are going on in their life right now that are determining what their future goals are. It has to do with the culture, how they manage, what the culture is of the organization, what's happening in the environment. So that's why we always say that 30% is a big 30% that can really help you, but it is less than 30% of any management decision.

[00:24:11] And as I alluded to earlier, the assessment, you don't want to say that the assessment says that this is your blind spot, there it is. So it is, you say, "According to the assessment, this is a blind spot. What do you think?" "Oh, no, it used to be, but I changed that or oh, I don't know what would be an example." So, you can have a good conversation around it. But we don't want to, we want to give people agency, which is control over their own experience, and we just lay out what the assessment says. So, something you'll hear me say a lot is, according to the assessment, "What do you think?" And there's some great conversation. You'll get a great understanding of who they are. You'll create buy in and you're putting the person first. So, it's a great addition to your onboarding process.

[00:24:57] So the first step in the process is to have them complete the hiring assessment or the coaching assessment. It's quick and easy in regard to completing the assessment. And what happens is we can take the assessment. If they were a candidate, we can take the assessment that they already completed. So, you had a shorter talent report, which is shorter. It's like, I don't remember how many pages, 13 pages. It's very short in that regard, where you're looking at the different areas, but there's not a lot of coaching material. And so, you can take it from a 17 page or I have it on here, 17 page report for hiring and convert it. We do that on the backend for you without the candidate, new hire, having to do anything else to give you the coaching report and it is 47 pages. So, here's an example of the candidate's report. You can see the graphs. So, if you're curious about what that looks like, it's much shorter data. And then here's an example.



I'm just pull two pages of the streamlined coaching report. You see some graphs on there, but it's mostly verbiage and insight.

[00:26:02] And I want to show you some things that you get from a new hire's coaching report. Like, for example, there's one area that talks about ideal environment, and part of the coaching conversation that you would have with your new hire is, "Hey, look at the ideal environment page." There's probably, I don't know, three, six, nine bullets there. And you say, "Look at this page and pick the three that matter most to you, New Hire Harry," or Kevin in this case. This is Kevin's report. And so, you'll see things like Kevin, we highlighted three of them. Kevin might have selected an innovative and futuristic oriented environment. So, if Kevin selects that your new hire, you'd say, "Okay, Kevin, that's interesting. So, tell me why you picked that one?" And then they start to tell you why that matters to them. You start to understand who they are, what they need to be successful. They are feeling valued and seen and appreciated. You're creating an understanding relationship. You're not just giving them data, you're learning from them, about them and also helping them verbalize things that they know about themselves.

[00:27:06] Another thing in here is an environment where he can lead the parade that is the ideal environment bullet, and he'll say, "Oh, I picked that one because I've always liked to be," you know, you just get insight from the employee always. You have them pick the items that are most important to them and then you say, "Why did you select that one?" And just be the leader who listens and tunes in to who they are as a person and wants to know more. You're talking a lot less in this. This how's it going, meaning you're doing maybe maybe 25% if that of talking. You're just being a great facilitator by asking questions and learning about this person and they're talking most of the time.

[00:27:49] So, there's another page that you get in this coaching report. This is keys to motivating. So, you say, New Hire Kevin, there's a list of items and let's see on this one there's three, so there's nine items that came out of the assessment, that according to the assessment, is what motivates you, are keys to motivating you. Tell me what three are most important to you and why?" And one of them is, I'll pick the one at the bottom, space and latitude to do what it takes to get the job done. "Oh, that's interesting, Kevin. Thank you for telling me that. Why did you select that one? What does that mean to you?" And they're going to tell you past examples. They're going to tell you how they like to work. You're going to learn so much.

[00:28:30] Keys to managing is another page and these give you insights. And Kevin even is going to tell you about a blind spot because he picked to adjust his intensity to match the situation. You're like, "Oh, so that helps you if I help you do that?" "Oh, yeah, I get really intense. I know I've been told that before. I mean, the intensity is good because of this," that, whatever the answer is. But you ask why and now he's given you freedom or permission to help him do that.

[00:28:59] And so this is, the keys to managing is also very, very participatory, facilitative kind of conversation. You get great insight. So that's a little look into the assessment, the coaching report and what you get from that.

[00:29:14] There's a new hire email that we've even, we have a sample email for you and it's basically saying, "Thank you for completing the assessment, here's your results and we suggest



you send this guideline for reviewing your results." It's a one-pager that explains, "Hey, we're focused on strengths," and you click on the document in the show notes at pricelessprofessional.com/onboardingwithtrimetrix, to see that guideline, but it gives them, again, it's giving people something to do with the assessment that allows them to be in charge of the results and how they use them. And so, the guidelines just tells them to check the things they agree with, x-out the things they don't, put a question mark where they have questions and then we we have a strength revealer video. And so, we suggest prior to them meeting with you to one, read the guidelines and read their report, then watch the strength revealer video. It's a 30-minute video that just helps them understand using our car analogy, what each part of the assessment is measuring and how to look at it and think about it.

[00:30:19] So immediately they are getting development right away without you even having had a discussion with them. And according to the Gallup Organization, people, if people know what their strengths are, say, on Monday, they didn't have this report and they didn't really have a focus on strengths, what they are for. And then Tuesday, they now read their report and they're watching the strength revealer video, according to Gallup, people are 8% more productive when they know what their strengths are, because most adults don't know what their strengths are. They equate it to just their work experience. And it's all these other things about how we communicate. It's all these intangibles, what we're most interested in, what we're willing, what drives us to take action.

[00:31:03] So there's a sample email there with those two links, and that's what you forward with the assessment. You never want to leave somebody with an assessment and, it be kind of an intimidation factor. I mean, the average person is pretty hard on themselves and the average person looks for everything that's wrong in the assessment and you don't want that to be the focus. You want to give them some pre-work prior to meeting with you.

[00:31:27] And then I've got a sample of what the guide for reviewing your results that one pager is. You'll see it if you go watch the video, you can read it, or you can get the time saver summary document and it explains it or shows you that. So, I'll just clip through these. This is basically what's in that one page and then a reminder of the strength revealer video on that page where the strength revealer video is or a bunch of other development resources, so self-motivated folks can go there. You as a leader can go there and watch the video yourself, or just use some of the tools that we have there. The link to that is pricelessprofessional.com/myassessment, my assessment, all one word and you see some of the development resources. There's the video, there's debrief tools, there's a development plan worksheet that you could use if you were helping with coaching in that way. We've got to TriMetrix University, which has all kinds of resources related to every area measured in the assessment and then other tools.

[00:32:34] So we've done step one. We've had the new hire complete the coaching report. We sent the new hire email where now, what they're going to do. The pre-work that they're going to do as a new hire and now you're going to meet with a new hire and follow this agenda.

[00:32:49] And the onboarding coaching agenda is in the summary document and you'll see session one, and every session we want to start with, "So good to see you. Tell me a little bit how are things going?" So, it's a how's it going question at the beginning, "What's going well? What could be better? How can I help?" If you ask those questions, you're 1,000% ahead of

what happens for most new employees, new hires. You're tuning in, you can hear, you do block and tackle with them. Just help them be seen, be heard, feel supported.

[00:33:23] And then we have an icebreaker that we recommend. And I think you should both answer this, and it's think of all the people who've influenced you as you are growing up, who had the most influence on you. And so, you're having this great, it's an icebreaker, break the ice. We don't know each other; we're going to get to know each other. So, you could go first and maybe, maybe if you're the manager, you go first and you share something that's personal, "Well, my sister had a great influence on me because, or my soccer coach or my dad." And what's so interesting about this question is they answer it to 90% of the time. There's some correlation between who influenced you and what most motivates you, what causes you to take action, which is the workplace motivators assessment, what puts gas in your tank. You can often, if I facilitate these kind of conversations with people, and I, if I ask enough questions, I could say, "What's that related to?" And they often see the connection, that whatever drives them, which is nature or nurture or top motivators, is also related to how they were influenced in their younger years.

[00:34:30] So, you get some personal connection there, get to understand them as a person. Remember it's the person before the actions and before the ideas or the systemic. It's putting the person first and then what you're going to do is go through some different sections and ask them to share key points from their assessment. So, you're going to discuss, the first meeting is discussing their motivators. That's why that question is there, "What are their top motivators?" And we've got in this document a motivator memory card that you can look at together and pages that you can look at. And basically, it's a great meeting. You have a full meeting and exactly what you can do during the meeting and then you close with, "Well, tell me a little bit about what was most helpful for you today during the conversation," and then you schedule the next meeting.

[00:35:20] So you want to give feedback to them and don't shy away from that question because it's going to, you'll be surprised, especially when you interview, you have these meetings with different people. Some people will say, "Well, I really just, I liked that icebreaker that we just did. I love that you're checking in. I love learning about my motivators." You get to see through their eyes how they're experiencing this meeting, and you are yet again learning something else about this person that you've hired. Make sure you schedule your next meeting, so things get busy. It's hard to do onboarding sometimes with folks, and this is not the one and done onboarding. This is, "I'm your manager, we work together on a team and I'm getting to know you meetings to get that higher productivity and less turnover than we want."

[00:36:03] So, we have session two. So, here's your second meeting and you plan that according to what makes sense. Is it two weeks? Is it three weeks? It's four weeks. I would say I wouldn't go longer than three weeks because they're deciding in their first 90 days whether they're going to stay or go. So, session two, you're asking the same question, "How are things going? What's going well? What could be going better?" And then you're reviewing now those pages where I talked about earlier, I showed you examples of Ideal Environment, Keys to Motivating, Keys to Managing. And I kind of gave you an example of what to do. But in each section, you ask the new hire, "Pick the key points that you most want to share and why it's

important." And so that will take a bit of time and it'll be a great discussion. And you will have a different relationship with this new hire, one that is more effective and more connected than if you had not done this. And then the close you do the same question, "What was most useful today about this conversation?"

[00:37:03] Session three, same thing. You're going to start with, "How are things going? What's going well? What could be going better? How can I help?" And then you're going to look at the competencies. Those are the personal skills listing. We've got the page numbers shared here. So, all you have to do is go to the page numbers and point out the top seven personal skills of this person, the greatest strengths, and discuss with the employee how those can be used on the job. Look at lower scoring personal skills. Don't shy away from them. You're doing a great balance, they say, the Gallup Organization says, "Three appreciation of strengths to everyone course correction." And in this case, you focus plenty on the strengths and you want to balance it out with their lower scoring personal skills. Everybody has them out of the list of 20 plus and then say out of all of those personal skills, "What's one or two that you're finding might need to be stronger or would be help for you to grow? What's a growth edge for you?"

[00:37:57] And then there's the TriMetrix Learning Bias. You could go look at the Learning Bias link. That's the TriMetrix University. These are self-paced development resources and come up with a plan on that. And then lastly, you close with the same question, "What was most useful to you during the conversation today?" And then think about next steps you might want to continue, "Hey, let's meet once a month." I mean, it's up to you to stay in touch with your employees in a way. And then if they've committed or agree to do something that you've discussed, make sure there's a follow-up and that they are clear on it and you're clear on it, you're on the same page.

[00:38:33] This is a quote from a CEO whose CEO had him go through this process. I facilitated it in this case, but you don't need me to facilitate these. But he had 13 new direct reports is a long-term organization, those direct reports and reported to somebody else for a very long time. And so, this it was resistant because he was new and he had a lot to do and this didn't seem like a good use of his time. But the CEO insisted, "You are going to go through this and you're going to go through it with Suzie. She's going to facilitate it." And I'll just read the quote to you. He said, "I found the TriMetrix onboarding assessment process very helpful as I came onboard as Chief Operating Officer at this company. My new team of 13 all had long tenure within the organization having their assessment results and Suzie facilitating one-on-one Triad conversations helped us all understand our strengths, drivers, preferences and blind spots and how to best work together. I continue to refer to my team's assessments our side-by-side results and the team's one page reference sheet to guide how I lead, manage and better relate to each team member. It's been effective and worth the time." So that was like a gold quote, you just want to hang that on your wall because he really didn't want to do it just because you wanted to be efficient, you know, I just want to do all this other stuff, not just people connecting thing, but found it valuable.

[00:39:57] And he referenced a reference sheet. We have a have a talent tracker that we can make for teams where it's one page and it shows each person's top's strengths, top motivators, top communication style, and then there's a cheat sheet down at the bottom so you understand



what each one means. We're trying to make it simple and actionable. And so that was what he's referring to there.

[00:40:22] So we've had the new hire take the TriMetrix coaching report. We're sending the new hire email with some pre-work. We met with the new hire, and we followed the agenda. And then fourth step is just kind of a general statement, but we're going to share some of the resources and make sure we check in. And that is in the document, that one page timesaver document that we have that's with coaching, is you can create a position benchmark. That's something we talk about in the hiring with TriMetrix where you pick the attributes most important to success for the job, but you can also use it in coaching because you could take those attributes and then see where somebody's scored and come up with a development plan. And here's where you see an additional place where there's links to their online development plan worksheet is a way to list the items that are going to be focused on, to leverage for strengths or potential blind spots. And then it is a place to track how someone's doing. And then the TriMetrix University is where a bunch of tools are. And so, I've got a visual on the page of what the online development worksheet looks like. It gives a summary of the definition, and it gives you on the left hand side, you see the competencies for the job. These were selected from the Superior Performance Attributes worksheet. Again, we discuss that in full on the Hiring with TriMetrix podcasts, so you understand that the motivators, behaviors and so it allows someone to know what is needed for success in the job.

[00:41:52] And then we have some other coaching resources that we, that we share. There's a side-by-side report that is a report where it takes Suzie's results and my manager's results for how we like to communicate, and work and put some side-by-side. That's another type of thing that we generally suggest using in mentoring, and we'll go into more detail on that. But there's a Triad call, that will also go into more detail around with conflict management and how having both sides do some work. I'll go into detail around that and then you'll see reference cards in this document for remembering what is measured in motivators and the DISC and how each motivator acts in Christ. So, the good summary cards that recap what's measured and again, I'll keep pointing you back to the summary document, one-page, two-sided that goes through this whole process and allows you to take what we've discussed today with you.

[00:42:51] We've covered today Onboarding with TriMetrix is four step process. We want a smiling face. They were, we hired this person. We went through a lot of work to make sure they were good fit. Now we want to keep them. We don't want to lose them. We don't want them in the first 90 days to their initial impression of what it's going to be like to work here to be a grind or they don't, then nobody's connecting with me. You can overcome a lot of organizational mistakes by crafting a close leadership connection. People leave managers oftentimes not just the company, or they stay because of the managers, not because of the company. So, your leadership matters. Your connection with each employee matters and remember to keep the people connection as a greater priority than the getting things done and the strategy or the ideas. All three matter and they're all high up there. But if you keep the tilt toward the people and you take time to do these things to ask, "How's it going? What was helpful to you today? What matters to you," you will create a different kind of team and a higher level of trust. When trust is broken, it means we feel like you don't care, you're not tuned in and you're not going to listen. And when trust is strong, you give people the benefit of that because you say, "They



care, they listen. I matter, they matter. And I'm willing, willing to work here and stay here and give people grace when they make mistakes, because the gas tank is full, the bank account is full." All of those analogies all in one.

[00:44:30] We have a podcast, another podcast I want to mention is pricelessprofessional.com/newhire, and it's getting people to stay, three reasons why you need new hires to stay and three things that you can focus on. A lot of what we've covered today, but it was done a while back and there's some, probably some additional information here that might be helpful. What you're trying to do in onboarding is reduce the fear, increase the understanding and give them what they need. And that's really what we've talked about today. I've just gone into more detail in this particular episode, pricelessprofessional.com/onboardingwithtrimetrix, about the actual using the assessment. In this episode 44, which was done a while back, it's about the connection with the employee and what they need. So pricelessprofessional.com/newhire, if you can visit that we do have all the tools for employees, pricelessprofessional.com/myassessment. Don't forget about episode 81, Hiring with TriMetrix, which is pricelessprofessional.com/hiringwithtrimetrix.

[00:45:35] My favorite quote, you see it a lot, you hear it a lot from me, but it is from Dr. Hartman who was the Founder of the science that is covered in the horsepower part of the assessment, the personal skills, the science of Axiology. And he said, "Are they going to be happy? Are they going to be productive? Will they want to stay? Will they own their job? Will they contribute their talent generously?" So how do you make sure they're happy? You make sure they are fit. How do you make sure they're productive? You make sure they are fit, and you make sure they know what they need to do to be effective in the job. You make sure they have a great onboarding experience.

[00:46:12] And remember 80% more productive if they have a great onboarding experience. How do you make sure they stay? 70% more likely to stay, increases retention, they have a great onboarding experience. How will they own their job and contribute their talent generously? They'll feel like they matter, that somebody cares for them, that the personal side of who they are matters. And the more that it's interesting, the more they know that matters, the more they're willing to focus on the action and the strategy and the doing. When they don't think that matters, the less they're willing to focus on. So, it feels like, "Oh, I got to do this heavy lift, I got to focus on people first on." But in truth, the more you do that, the more you value that, the more people are willing to give. And it's not in a manipulative way. It's the way we are. We need to know that we matter. And you'll see in this quote that I've said, "Are you going to be happy? Are you going to be productive? Will you want to stay? Will you own your job? Will you contribute your talent generously?" And I say that because I want you to apply these tools to yourself. You'll be more effective when you use them. Can't really give somebody what you don't already have.

[00:47:26] And so when you get excited about this process and you've used it on yourself and felt the benefit of it, you'll be able to translate that to your new hires and to your employees. And this could be used for onboarding, but used for anybody who you've lost connection with, who you're concerned about, or it could be a top performer. I mean, we spend a lot of time sometimes on low performers, and we just assume that the high performers are just going to



continue to be a high performer. High performers may decide to leave because they're not getting enough attention or don't feel valued. And this is one way you could do that.

[00:47:58] So Onboarding with TriMetrix presented by Priceless Professional Development. Again, the show notes are at pricelessprofessional.com/onboardingwithtrimetrix.

[00:48:09] Happy happy to be here, happy happy that you've tuned in and listen to, hope that it's been helpful. If you have any questions, you can reach out to me at pricelessprofessional.com/suzie, if you have any suggestions, follow us on LinkedIn, that's where we do a lot of posting. We've got Wake Up Eager Workforce LinkedIn posts; we have Priceless Professional Development posts and then I do post as well. So, we'll see you over on LinkedIn. Thank you for tuning in. All the best.

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