

Comments from newer agents from the Onboarding survey Taken by Carla Cross

See the survey questions in this blog. Here are the answers from the agents I surveyed.

People I surveyed joined the office from August of last year to March of this year. I interviewed 6 agents; some were new; some were experienced.

Question: Who helped you with onboarding?

Some said it wasn't clear who was supposed to help. Some admin. Said they didn't know who did what. Need a contact name by every action needed?

Some were confused. Not clear in who was to help. Manager didn't appear (Tonja). Needs a path in writing. Agents said some leadership have been helpful.

Question What worked well?

Admin. manager got things set up; not clear about who was to put photo on website.

Need a clear message about who is to do what.

Liked communication via email and face to face.

Experienced agent: many things to learn. Need better priorities.

Do priorities need to be in a different color?

Agents liked the tour. Said staff was wonderful; stepped in to help when things were confusing.

Question: Who checked back with you to see how you were doing?

Pretty much all said no one checked back.

Need one person who is assigned to each new agent to follow through and check back each week with new person. Really important to have a full circle of accountability here.

What do you wish would have happened?

Had someone to follow through.

On tech training— Much better to have agents have their computers and do a mock-up of these. That's how people learn. Hopefully, we'll imbue all our courses with much more 'hands on'—will result in much less hassle for admin. And much more learning from agents.

Even agents who had been selling for 5-20 years found the whole process over-whelming. Are we breaking this into best segments and prioritizing and checking back?

Accountability: When is an agent 'turned in' to whoever hired that agent and told to get the work done, if it's not being done? (need that one person assigned to the new person and a clear path of accountability).

Interestingly, 2 people I interviewed had been in charge of onboarding for their prior companies. This would be very valuable to get more feedback from that kind of people.

Biggest need: tech help. One person, who's doing very well, still doesn't have a website after 10 months.

Priorities:

Most did not attend an office meeting—did not understand the priorities or importance.

I got, from the interviews, that the agents didn't 'get' the priorities and differences of this company. This is a very big deal in the onboarding process. We need to let them experience our differences from the beginning.

Buddy or sponsor: everyone I interviewed thought they could have benefited from a buddy.

Other suggestions:

Be more clear on the training calendar of what is being offered and who it's for (one interviewee wanted more tech training). I'm not sure all the agents are getting the training calendar on their phones. Probably each person needs to be checked with to assure they are getting that information. Also: a little explanation with each training as to who will benefit.

Suggestion: Ways to help cement the differences of the office culture

1. A series of emails, spread throughout first 3 months, that explain parts of the office and company
2. A 1 hour 'live' Introduction to the office, where high priorities are explained, roles are shared, questions answered