

# Onboarding Meetup - 29/30 March, 2023

## Date and Time:

29 March 2023 - All items on the board  
16:08 (UTC+00:00)

## Facilitator:

Onboarding&Upskilling Tessitura Community

## Attendees:

Annie Galloway, Katie Cullen, Juliet Moore, Katie Cullen, Robyn Thomas, Maureen PRAC (she/her), Ellen McCann, Crystal Flippin She/Her - Dayton Live, Jim Reynolds, Brianna W - RTC, Shelly Binkley, Nathan Stone, Natalie Jenkins, Jenny O'Neill-Englund, Tom Clarke, Megan, Boann Petersen, Nathaniel, Debra Lemak, Brittany R - Houston Ballet, Annie Scally, Neil | MN Zoo , Ethan, Millie Aldred, Ashley WS, Natalie Glyndebourne, Isaac (Glyndebourne), Mana Klein, Laura in KCMO, Juliet Moore, Cindy Fasl She/her Starlight Theatre, Katie Cullen, Rachael Downs, Pittsburgh Tessitura Consortia ISTS, Sam Bourne , Brian, Ariel Ehrman (she/her), Thanos, Joanne, Helen T, Olivia Anderson, sophie.ball, Bobbi, Celia, Phoebe, Gill Tasker, Jim Reynolds, Michelle Russell (MFAH), Shelly Binkley, Kris S. | Dr Phillips Center

## Summary:

What a great turnout for today's community meetup!

Here are the notes (apologies if there are any duplications of comments - there were some minor technical issues).

## Actions:

## Learnings:

## Topics discussed:

Anyone who is already live with v16, any tips or stumbling blocks you came across when training your teams?

Votes: 23

Suggested by: Ellen McCann

### Comments:

- Onboarding&Upskilling Tessitura Community  
The last community session was about V16 training
- Celia  
we aren't live but have been advised on at least 3 months of testing! - we will also creating an additional test environment to support familiarisation - in addition to current test and live  
Likes:1
- Onboarding&Upskilling Tessitura Community  
Maureen: Looking at planning ahead to begin sessions in Test with demos and training.  
Concentrating on largest areas of impact first; memberships, extractions, constituent model.

### Training for high turn over situations - students, summer staff, etc.

Votes: 17

Suggested by: Olivia Anderson

### Comments:

- Onboarding&Upskilling Tessitura Community  
Olivia: Work at university with student staff each semester - often new people. Also have film and theatre festival with only 2 days of training. Does anyone have a basic training plan for 'need-to-know' tasks rather than very in-depth?
- Onboarding&Upskilling Tessitura Community  
Cindy: Have created a photo flip book as a reference.
- Ellen McCann  
We have a modular training plan so that we can pick and choose which modules the summer staff need to be trained on - we then have a more detailed manual / internal intranet that can be referenced if they need it  
Likes:1
- Onboarding&Upskilling Tessitura Community  
Boann: Having info at fingertips is a great resource; flip book, internal wiki etc. They don't need to know all the info - they just need to know where to find it!
- Onboarding&Upskilling Tessitura Community  
Katina: Pair people up; someone experienced with someone new. This takes pressure off managers.
- Onboarding&Upskilling Tessitura Community  
Cindy: Flip book has little tabs for easy access to info

### Onboarding additional teams internally (and making sure they follow the new process!)

Votes: 15

Suggested by: Onboarding&Upskilling Tessitura Community

### Comments:

- Onboarding&Upskilling Tessitura Community  
Ethan: Hoping to bring a new team onto Tessitura - they are currently very reliant on spreadsheets! Looking for a good approach / business case for doing this
- Onboarding&Upskilling Tessitura Community  
Katie: Change management idea: rider and the elephant. A rider cannot force an elephant to do something! We need to get emotional investment - the things people are afraid of with change are not as scary as they may initially seem to be.

- Cindy Fasl She/her Starlight Theatre  
Might be good to do it in small doses. Find a portion of their work that translates well and train on that first and then move onto the next topic so it's not as overwhelming.
- Onboarding&Upskilling Tessitura Community  
PGH: Help them find their big wins. E.g. If writing grants, it can take hours - can you store this info centrally and compare it year over year? Find the pain points and show them how the new way can help with this.
- Onboarding&Upskilling Tessitura Community  
Annie: Had a lot of success by showing people Analytics. The visualisation helped see what it could do. But, to use it, the data had to be in Tessitura. Took one spreadsheet at a time as mini-projects rather than doing it all at once.

## What area of your organization leads Basic Onboarding? Or it is generally managed within Departments?

Votes: 15

Suggested by: Jenny O'Neill-Englund

### Comments:

- Onboarding&Upskilling Tessitura Community  
Katie: Different training tracks for each major group. Ticketing have their own training plans as it's more involved. Overview of training is done via Microsoft Teams, then individual departments get more into the detail.
- Onboarding&Upskilling Tessitura Community  
Jim: Box Office and Fundraising do their own training. Traditionally not part of DBA role to do training, but will be doing whole org training for V16; new features and new business practices.
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- Onboarding&Upskilling Tessitura Community  
Katie: Having a generalised starting point for everyone has been helpful as then you know everyone is getting the same basic training. E.g. What is Tessitura? How do I log in? etc.

## Doing annual or bi-annual refresher training as needed, and v16 training once we roll it out

Votes: 11

Suggested by: Ariel Ehrman (she/her)

### Comments:

- Onboarding&Upskilling Tessitura Community  
Thanos: Offer regular refresher training but take up is very slowly. 165 users but only 6 joined last session on orders. Also have a Sharepoint and save recording so people can watch it later.
- Onboarding&Upskilling Tessitura Community  
Sarah: We are considering making very short/bite size videos to cover certain tasks e.g. Creating a constituent record.
- Onboarding&Upskilling Tessitura Community

Katie: Offers monthly office hours for dedicated 1-on-1 time in a non-intimidating environment. At least 2 people have signed up each month.

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Shelly: Soon to start a monthly topical session e.g. Running Reports, Tips and Tricks for Analytics. In addition, Development team are creating their own series of training videos.

**I'm thinking of offering a voluntary monthly 1hr session in a Lean Coffee style format for any staff who want to participate. Is anyone doing something like this?**

Votes: 10

Suggested by: Jim Reynolds

#### Comments:

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Katie: Have an internal user group (quarterly) and include department specific breakout rooms - after the presentations - so they can talk about relevant topics.

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Jim: Want to promote knowledge sharing between staff members in organisation in a friendly way.

- Onboarding&Upskilling Tessitura Community

PGH: Weekly meetup for consortium; mixture of proposed topics, overview of Analytics, come with what your working on. Mix and blend has been successful.

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Sarah: Considering taking laptop and working from different department areas for an hour or two. Hoping this will enable me to troubleshoot on the go!