

Onboarding Meetup - 8/9 June 2023

Date and Time:

13 June 2023 - All items on the board
09:18 (UTC+00:00)

Facilitator:

Onboarding&Upskilling Tessitura Community

Attendees:

Laura Fichtenberg, Isaac Freeman, Gill Tasker, Odele, Jim Reynolds, Rose Aitchison, I Freeman, Nathan, Sue Llende, National Veterans Memorial and Museum, Kirsty - Amgueddfa Cymru, Neda, Pittsburgh Cultural Trust, James Wigley, Joy R., Michelle Russell, Claire, Shannon Teppert, Public Theater, Luke Henry, Ffion Williams-Cormany, Claudia Lutz, Mana Klein, Antonio, nicole, Matthew

Summary:

Here's a summary of the great discussion we had during the Onboarding and Upskilling community meetup on the 8th of June 2023.

Actions:

Learnings:

Topics discussed:

Are there any suggestions for interactive elements of training sessions which have worked well previously?

Votes: 12

Suggested by: Kirsty - Amgueddfa Cymru

Comments:

- Joy R.
Does anyone use their Test DB for interactive training practice?
 - Michelle Russell
Yes, definitely!
- Onboarding&Upskilling Tessitura Community
Katie: Uses tests to gauge how much they are retaining their information - self guided that get "graded" at the end

- Onboarding&Upskilling Tessitura Community
Sarah: Lucky Dip - scenarios in an envelope that a trainee picks out one and they all work that out through in person scenarios - putting into practice what you really do - carried out in real life
- Onboarding&Upskilling Tessitura Community
Sarah: Easter Egg Hunt - in your test database, create fake records and create a test where people have to answer the questions by finding the answers in the accounts

How do you approach onboarding and training teams who are hesitant to use/learn Tessitura?

Votes: 11

Suggested by: Onboarding&Upskilling Tessitura Community

Comments:

- Onboarding&Upskilling Tessitura Community
Katie: Try approaching it in a more emotional way. 'If you put a little bit of time in now, this will help you in ways x, y and z in future'. Help them see the value and benefits.
- Onboarding&Upskilling Tessitura Community
Kirsty: Get all the stats they would've spent hours trying to collate - and bombard them! Gets people interested in how to use Analytics and do things quickly. And use teams who are 'cheerleaders' for you and get them to do the leg work and shout about the benefits.
- Onboarding&Upskilling Tessitura Community
Joy: Onboarding whole Development team after losing a number of key staff. Needed to give them an understanding of breadth and depth of work; set up regular meetings, a training dashboard for tracking, really explain why Tessitura is important.

Has anyone begun the process of training their teams on V16 and if so, how have you approached it?

Votes: 10

Suggested by: I Freeman

Comments:

- Onboarding&Upskilling Tessitura Community
Sue: Now on V16. Held sessions with screen-sharing to show new design as user experience changed dramatically. Encouraged teams to have a go in Test. Familiarisation - but mainly trial by fire when the switch was flipped!
- Onboarding&Upskilling Tessitura Community
Sarah: Planning to create bite-sized training videos (using software like Loom) which people can use as both an intro and a revision tool. Intending to keep them very short e.g 'This is how you create a new constituent record.'
- Onboarding&Upskilling Tessitura Community
Sue: You could use a Trello board to help guide people as to what they should be doing.

What's your pace and method for refresher training? Yearly, monthly, etc.

Votes: 10

Suggested by: Michelle Russell

Comments:

- Onboarding&Upskilling Tessitura Community
Katie: Doing a survey to figure out what topics need refreshing. Planning to do sessions yearly.
- Onboarding&Upskilling Tessitura Community
Michelle: Bi-monthly meetings with users and use some of this time to do training. Did a survey and found it a good way to check in - surprised (in a good way) at how confident people were!
- Onboarding&Upskilling Tessitura Community
Katie: Weekly tips and tricks e.g. letting people know about the ideas board on Tessitura Network. Had good feedback.
- Joy R.
How do you prioritize setting up trainings for your org in relation to all of your other DB tasks?
- Onboarding&Upskilling Tessitura Community
Sarah: Add simple tricks like keyboard shortcuts to team newsletters (e.g. ticketing)

Do you use any "tests" to assess skills or if not, how to measure success in training?

Votes: 5

Suggested by: Odele

Comments:

- Onboarding&Upskilling Tessitura Community
Katie: We have little tests during training. We rely on a proficiency survey to assess where everyone is at.
- Michelle Russell
Sharing the template for our newly created skills test, if anyone is interested:
<https://forms.office.com/Pages/ShareFormPage.aspx?id=47QtzufeUOVTL2M87w3w-fOIfLj91EgMtznVVwc-1UM1NXNkVNTEVWR0NVMFJURUIZU1BKR0k2Si4u&sharetoken=f0zm7CbknGjrltwYSD48>
Likes:1
- Onboarding&Upskilling Tessitura Community
Sarah: If you have 2 or more people, get them to write questions for each other. E.g. If you've just learnt how to use the Product Catalogue, have them create 3 questions for their partner - 'How much are tickets for show x?', 'What's the age limit for show y'? etc.
- Onboarding&Upskilling Tessitura Community
Katina: In Pittsburgh we have thought about using a constituent import for TEST to plug in the "dummy" records when we need for training

How do you approach onboarding people who are new to your organisation but have previously used Tessitura?

Votes: 1

Suggested by: Onboarding&Upskilling Tessitura Community

Comments:

- Onboarding&Upskilling Tessitura Community
Michelle: The same way we approach people who have never used it before - everyone gets the same baseline training. An experienced user said it was helpful to get the ground-up introduction.
- Onboarding&Upskilling Tessitura Community

Katie: We don't make them watch videos but we do make them do relevant exercises to make sure they're adhering to data standards etc.

- Onboarding&Upskilling Tessitura Community
Sarah: Pair up someone experienced with someone brand new when doing exercises - they can help and feel like they're adding value by knowledge sharing.
- Onboarding&Upskilling Tessitura Community
Michelle: Always make sure logins work before training session - saves a lot of time! And trainer blocks out more time than needed to allow time for questions and recapping.

Which software do you use to manage Tessitura onboarding?

Votes: 1

Suggested by: Joy R.

Comments:

- Onboarding&Upskilling Tessitura Community
Katie: Teams - the whole host of Microsoft products such as forms, Word, PPT, Sharepoint. Looks more cohesive and good place to store documentation.
- Onboarding&Upskilling Tessitura Community
Joy: Just starting process of creating documentation - making do with own LMS, including Sharepoint.
- Onboarding&Upskilling Tessitura Community
Katie: Sharepoint includes docs like 'Getting Started with Tessitura', 'Ticketing training', 'Marketing Training' etc. Sessions have indicator of time taken which people have said is very helpful. Many sessions link to Tessitura training videos as well as example exercises created in-house.
- Onboarding&Upskilling Tessitura Community
Antonio: How do you maintain the knowledge of who is able to do what? I.e. Skills management.
- Onboarding&Upskilling Tessitura Community
Katie: Missouri Botanical Garden did a presentation at TLCC last year about maintaining skills. They shared a rubric that listed each person and each skill.
- Onboarding&Upskilling Tessitura Community
Sarah: You could use a survey where people rate their confidence level in each skill and use this to track where people are.
- Onboarding&Upskilling Tessitura Community
Katie: When sending survey, include all business areas so people can express interest in upskilling. You will then know who is interested in your next training session - and also, who is confident in a particular area and may be able to train others.
- Onboarding&Upskilling Tessitura Community
Joy: Curious about concept of 'super-users' - how can we develop people to distribute training?

What LMS are you using? Is it integrated to o365?

Votes: 0

Suggested by: Antonio

Comments:

Any recommendations for facilitating trainings when test is in V16 but prod is functioning in V15?

Votes: 0

Suggested by: Onboarding&Upskilling Tessitura Community

Comments:

- Onboarding&Upskilling Tessitura Community
Antonio: Have training as close as possible to your go live