Onboarding Guide

Transitioning to Notifyd in 30 days with minimal headaches.

Objective

Making any kind of change at an organizational level is difficult. Our goal is to make transitioning to Notifyd as simple and seamless as possible. This document provides a checklist of important steps, milestones, and tools you can utilize to gauge your team's onboarding progress.

Over the years, we have learned various tips and tricks to expedite your transition process, and we have made a point to capture them in this document.

Every company is different, and so if at any point you feel the transition process is proving difficult or slow please reach out to our support team for assistance. They can be reached at support@notifyd.com or (855) 668-4398.

Milestones

There are three major milestones when rolling out Notifyd at your organization:

1. Initial Setup   **2. Office Adoption**   **3. Field Adoption**

Initial Setup

Our first goal is to make sure that Notifyd is set up and configured properly so that your employees first impression is positive and exciting.

Appoint an SME

You will want to assign at least one key change agent who is personally invested in making Notifyd work. This could be your Branch Administrator, Director of Operations, HIPAA Compliance Officer, or even your resident tech guru.

The most important quality of this person is that they are motivated to learn and teach others. They will have access to tools that help support your team's implementation of Notifyd, and will also have the ability to support your team if they get stuck.

Timeframe: One day to appoint and connect SMEs with Notifyd's dedicated account executive.

Configure account

We will show your SMEs the different settings in Notifyd and explain what the pros and cons are so they can tailor the Notifyd experience to your unique team.

Additionally, we will help you reach out to your EMR and healthcare technology providers to complete the integration between your systems. This is followed by some light integration testing to make sure everything is hooked up properly.

Timeframe: Two days to set account preferences and complete integration efforts with other technology providers.

Office Adoption

Our second goal is to make sure your in-office staff, the employees who will be using Notifyd the most, understand why this change is happening, what existing processes are being affected by the change, how the product works, and what the benefits are.

Schedule training

Our account executives will work with you to schedule a time to review the Notifyd product. We will also identify two to three key use cases to focus on.

During training we will show your in-office employees the high-level features of Notifyd. We will then walk through the key use cases identified, and work through practical examples. Finally, we will hold a Q&A session to address questions.

Timeframe: One week to find an appropriate day and time to train your employees.

Send out invitations for in-office employees

Depending on what, if any, integrations you have, the invitation process differs. In some cases, the integrated solution can send out all your invitations for you so that you don't have to copy existing employee data by hand. In the case that you don't have any integrations that can send out invitations for you, your SME will need to manually import your employee's contact details into Notifyd. If you have a large number of employees, we can assist you further.

In addition to sending out invites, we will also work with your SME to grant appropriate permissions for every office employee.

Timeframe: One to four days depending on the size of your team and what integrations you have set up.

Measure adoption progress

Notifyd provides reporting tools to help you gauge how quickly your office staff is getting set up. SMEs can use these reports to expedite the office adoption process, which will also prepare you for rolling Notifyd out to field employees.

Timeframe: Three to seven days depending on the size of your team and their availability.

Field Adoption

Our third goal is to make sure your field staff understand why this change is happening, what existing processes are being affected by the change, how the product works, and what the benefits are. We will also look to make sure SMEs are able to support your field employees adequately during this transition. To reach this milestone, we need to complete three tasks:

Send out invitations for field employees

The process for inviting field employees is identical to how you invited office staff. We will work with your SME to figure out appropriate permissions for field employees.

Timeframe: Three to seven days depending on the size of your team and what integrations you have set up.

Reinforce adoption in the field

The most successful rollouts of Notifyd involve a series of process change reinforcements. Some companies take an approach of reminding anybody still sending texts or emails to redirect their messages through Notifyd. Other companies go so far as to say that they will only offer new shifts through Notifyd.

While the latter approach may seem scary, it is definitely effective. If you're not willing to hold your employees to the first, reminder-based approach, then you should anticipate a slower than necessary adoption timeframe. This is where some companies experience the most difficulty, because they fail to reinforce the change.

The adoption progress reports we covered previously can be incredibly helpful at figuring out which employees are lagging behind. We encourage sending a weekly followup email or text to remind your field to take the 5 minutes to get set up.

Timeframe: One to two weeks to achieve "critical mass." Two to four weeks to achieve 80-90% adoption.