



# Onboarding Program



# Table of Contents

<b>Welcome to JESI.....</b>	<b>1</b>
<b>Part I – Onboarding Handbook .....</b>	<b>2</b>
Introduction .....	3
Phase 1: Pre-planning.....	5
Step 1: Identify Strategic Sponsor.....	6
Step 2: Identify scope of implementation.....	7
Step 3: Identify and contact Onboarding Team .....	8
Step 4: Set Agenda for Initial Planning Workshop .....	10
Step 5: Activate your Onboarding Team in JESI .....	12
Phase 2: Scope and Development .....	13
Step 6: Confirm scope of implementation.....	14
Step 7: Develop JESI procedure .....	15
Step 8: Potential barriers and resistance.....	18
Step 9: Develop Communication Plan .....	19
Step 10: Develop Action Plan .....	21
Step 11: Reporting and Statistics .....	23
Phase 3 Confirmation.....	25
Step 12: Gain approval for plan .....	26
Step 13: Collate User data.....	27
Step 14: Upload User data.....	28
Step 15: Set up Custom Locations .....	29
Phase 4 Training .....	30
Step 16: Prepare to deliver training.....	31
Step 17: Deliver training .....	32
Step 18: Add JESI onboarding to internal Induction Program .....	34
Phase 5 Evaluation .....	35
Step 19: Seek Feedback internally .....	36
Step 20: Provide feedback to JESI.....	38
<b>Part 2 – Onboarding Templates .....</b>	<b>39</b>
<b>Other Handy Onboarding Documents .....</b>	<b>41</b>

# Welcome to JESI

---

Thank you for selecting JESI as the preferred software solution to monitor the safety of your workers. JESI will support your business to effectively manage the risks associated with a workforce who are on the move, and/or operating in locations that are identified as remote.

By now you and others in your team will have had the opportunity to experience just how easy-to-use JESI is, however we also know that change can bring resistance for individuals within an organisation.

The key to a successful JESI onboarding is to ensure the process is communicated clearly. It is a known fact that the most common reason for project failure is resistance to change and ineffective management of human behaviour. Barriers and challenges are often viewed as negative, however acknowledging feedback can often create a platform for positive and solution based outcomes.

Our Customer Solutions Team is here to support the onboarding of JESI across your organisation.

Your success is our success and we look forward to celebrating your organisation achieving a positive and productive JESI Onboarding.

You are on the way to Creating a Safer Connected World.

Regards

Joe Hoolahan

JESI CEO



# Part I – Onboarding Handbook

---



# Introduction

---

The JESI Onboarding Program has been developed to assist organisations effectively embed JESI, in a way that ensures buy-in and engagement at all levels of the organisation. Consisting of 5 simple phases, the Onboarding Program provides all of the templates and guidance needed to successfully implement JESI.



**TIP:** Your success is our success so if you need help at any time, please do not hesitate to contact us at [customersolutions@jesims.com.au](mailto:customersolutions@jesims.com.au).

## 5 Onboarding Phases

**Phase 1** Pre planning

**Phase 2** Scope and Development

**Phase 3** Confirmation

**Phase 4** Training

**Phase 5** Evaluation

## Prosci ADKAR Model for change

The JESI Onboarding Program incorporates the Prosci ADKAR Model for change. The model is simple and easy to understand, yet very effective for managers and change management teams to evaluate the completeness and potential impact of their onboarding program. By regularly checking-in on the ADKAR phases of change, your Onboarding Team (chosen in Phase 1) will be able to identify how successfully the onboarding is progressing and take corrective action if required.

<b>A</b> Awareness	Awareness of the reasons for change
<b>D</b> Desire	Desire to participate in the change
<b>K</b> Knowledge	Knowledge about how to change
<b>A</b> Ability	Ability to make the change

**R Reinforcement**

Reinforcement to ensure the change sticks

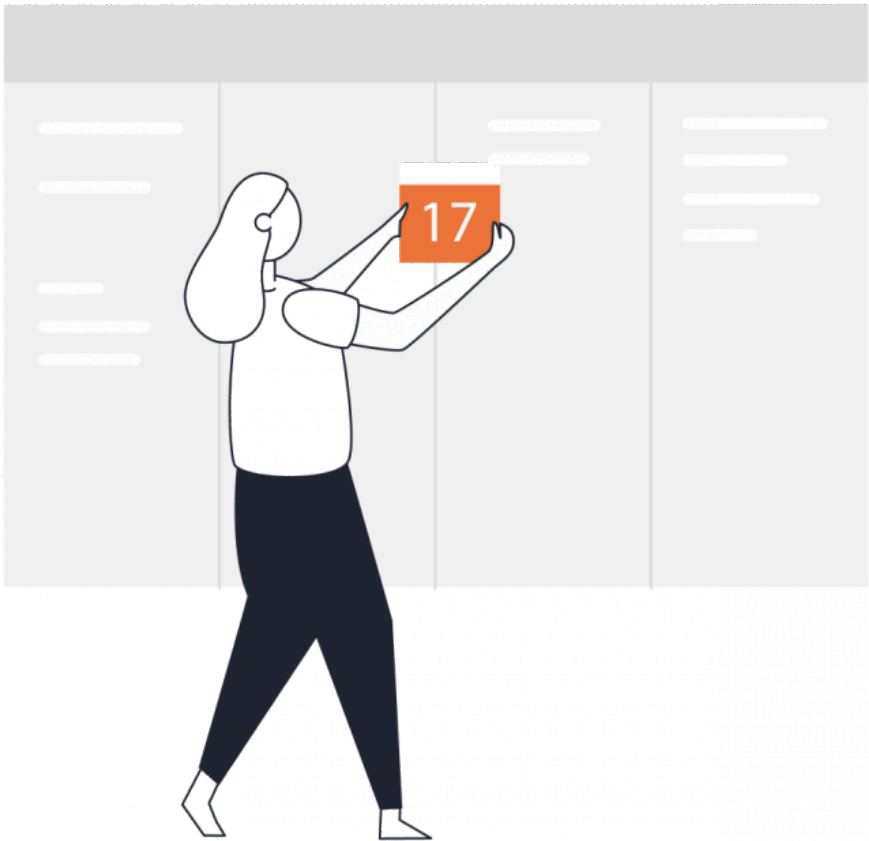


**TIP:** Research consistently points to these top contributors of change management success (Prosci):

- Active and visible executive sponsorship
- Structured change management approach
- Employee engagement and participation
- Frequent and open communication
- Engagement with middle managers

# Phase 1: Pre-planning

---



# Step 1: Identify Strategic Sponsor

---

**Responsibility:** CEO (or Delegate)



## Action items

- **Identify** an internal Strategic Sponsor who has overall responsibility for the successful onboarding of JESI.
- **Discuss** with the Strategic Sponsor the expectations and management of the Onboarding schedule
  - [Onboarding Checklist](#)
  - [Onboarding Schedule](#)

---

Executive sponsors are instrumental in creating desire to support and engage in a change among employees. To see the best results and the most adoption of the new solution, senior leaders need to be present and active in the process. Sponsors who disengage risk greater resistance to change, slower adoption or in some cases project failure (Prosci).



## Step 2: Identify scope of implementation

---

**Responsibility:** Strategic Sponsor



### Action item

Identify the scope of the implementation

---

- Activities to be included
  - Journeys
  - Working From Home
  - Working On-Site
  - Lone Worker
- Sites/Locations to be included
- Staff to be included

This will assist in developing an understanding of the resources & time required to implement.

## Step 3: Identify and contact Onboarding Team

---

**Responsibility:** Strategic Sponsor



### Action items

- Identify key personnel within the organisation who will form your internal Onboarding team.
- Once identified, [email staff](#), inviting them to join the Onboarding team and attend the initial planning workshop.



**TIP:** Attendance is critical for buy-in and your language in the email invitation needs to convey this.

This team will be critical to the success of the onboarding process and should come from as broad a base as possible. Depending on the size of your organisation, this team, ideally, would include representatives from the following:

- **Operations Managers and Team Leaders**  
Ops Managers and Team Leaders are your 'change drivers' and will be vital to the success of the project filtering down to all levels of the organisation.
- **Administration Managers**  
Admin Managers will be your JESI champions (super users) and ultimately your subject matter experts.
- **Travel Managers (If applicable)**  
Travel Managers can identify and create efficiencies and increase the exposure of the project within the organisation.
- **Human Resources/Learning & development**  
Learning & Development will need to ensure the roll out of the training aligns with their procedures and ultimately embed the new process within the organisation's policies.
- **Communications/Internal marketing**  
Communications representatives ensure the project upholds the organisation's brand.

- **Information Technology Managers**

IT managers evaluate ways that JESI can be integrated into the organisation's Information Technology processes.

- **Workplace Health & Safety**

WH&S representatives are not an essential part of the team however can be included if you deem it necessary.

Your onboarding team will have different responsibilities and as such, their involvement will be required at different stages of the process.

Regardless of their specific role, it is essential that this team of representatives is fully versed on the organisation's reasons for implementing JESI.

Their desire to engage and fully participate is crucial to the success of the process. If this does not occur, projects face increased resistance, slowed progress and reduced return on investment.

## Step 4: Set Agenda for Initial Planning Workshop

---

**Responsibility:** Strategic Sponsor



### Action item

Set the Agenda for the [initial planning workshop](#).

---

To give the process the best chance of success, the planning workshop will ideally include agenda items that not only include the practical components of the roll out but also those that will assist with the buy-in from the team.

We recommend that the Strategic Sponsor addresses the following with the Onboarding Team:

- Rationale for and value in onboarding JESI
- [Demonstration of JESI](#)
  - Roles
  - Teams
  - Escalation Contacts/Levels/Notifications
  - Risk Assessments (if applicable)
- Include an internal case study from a pilot (if applicable)
- Components of [Change Management](#) success and how the actions of the Team will assist
  - Awareness of the need for change
  - Desire to accept and support the change
  - Knowledge
  - Ability
  - Reinforcement
- Expectations of Onboarding
  - Open and frequent communication between the Strategic Sponsor and the Onboarding Team,

- Full support expected from Onboarding Team – being active and visible throughout the process,
- Strategic Sponsor to fully support managers to effectively lead the change.
- The importance of evaluating the success of the project – define which measures are most meaningful for the project and establish a method of collecting and reviewing the data.

# Step 5: Activate your Onboarding Team in JESI

---

**Responsibility:** Strategic Sponsor



**Action item**

Before the Initial Planning Workshop set up the Onboarding Team as Users in JESI and send their activation SMS.

---

# Phase 2: Scope and Development

---



## Step 6: Confirm scope of implementation

---

**Responsibility:** Onboarding Team



### Action item

- Review and confirm the [Scope](#) of the implementation.
- Familiarise yourself and the Onboarding Team with the [JESI Terms and Roles](#).

- 
- Activities to be included
    - Journeys
    - Working From Home
    - Working On-Site
    - Lone Worker
  - Sites/Locations to be included
  - Staff to be included



# Step 7: Develop JESI procedure

---

**Responsibility:** Onboarding Team



## Action item

Review existing Remote Worker Management processes and develop the new JESI Remote Worker Management procedure.

---

## Develop policy around:

### 1. JESI Activities

- All circumstances in which a JESI Activity will be required, for example
  - [Journey](#)
  - [Working From Home](#)
  - [Lone Worker](#)
  - [Working On-site](#)
- What approval processes will be put in place for each Activity and will Risk Assessments be activated.

### 2. Risk Assessments

Risk Assessments are a key tool in effectively managing the risks associated with your workforce, depending on the Activity they are undertaking. Risk Assessments are added at the Team level and JESI has 4 default Risk Assessments as a standard feature for all clients to activate if they wish. You can have different Risk Assessments activated for different Teams.

Risk Assessments can also be customised for your organisation and are adaptable to any Activity eg Journeys, Working From Home, Lone Worker. These works can be undertaken in consultation with the JESI Customer Solutions Team.

The Four Default Risk Assessments are

1. **Work From Home**

No approval, denial or review. The User is prompted to contact their manager if they answer no to any question.

2. **Basic**

No approval, denial or review.

3. **Intermediate**

Select a reviewer from your team. All combinations of answers require a review from the selected reviewer before the Activity can commence.

4. **Advanced**

The answer to each question has a score attached. The user's end score determines if the Activity is automatically approved/denied or requires a review and subsequent approval or denial by an Escalation Contact.

Score Level	Risk Rating	Outcome	Escalation Level
0-30	Low	Self approved	n/a
31-60	Medium	Review	1
61-100	High	Review	2
101+	Severe	Denied	2

---

### 3. Teams, Check-In intervals, Escalations and Incidents

#### Teams

Teams are groups of Users who require the same Escalation Pathways/Contacts. It is worthwhile spending the time to ensure these are correct in the early stages of uploading data.

#### Check-In Intervals

- How often will Users be required to Check-In
- Will Check-In intervals be the same for Users working at home as opposed to Users travelling.
- Ensure Check-Ins are scheduled where there will be connectivity

#### Escalation Contacts and Levels

- Who they will be,
- How many there will be,
- In what order they are alerted,
- In what time frame they are alerted
  - [Escalation Flow Chart](#)
  - [Team Structure and Escalation Levels/Contacts](#)

## **Incidents**

What kind of incidents will require recording for the Audit log

## Step 8: Potential barriers and resistance

---

**Responsibility:** Onboarding Team



### Action item

Identify potential barriers and resistance and discuss how to mitigate them.

---

If the 'what's in it for me' is not addressed for Users then they are more likely to be resistant to making the change to JESI. Discuss why Users might be resistant to using JESI and how you can manage this resistance.

Whilst it is unusual for there to be resistance to using JESI, if we do encounter push back it is usually around the following:

- Not wanting to use personal mobile
- No connectivity
- Issue sharing personal number
- Thinking JESI is a tracking device

See [FAQ](#) for suggested responses?

## Step 9: Develop Communication Plan

**Responsibility:** Onboarding Team



### Action item

Develop [communication plan](#).

Your Communication plan is a pivotal part of the implementation process and frequent and open communication is a key contributor to the project's success.

Consider the following when developing yours:

- How will you develop awareness and understanding
- What strategies will you use ie who will deliver and receive the communication
- What will your Key Messages be at different stages of the process
- What Methods will you use ie email, conference calls, face to face meetings

Different phases of the project will require different strategies, messages and methods,

### Example communication plan

What	Who	How	Recipients	Key Message	When
Official Project Announcement	GM/CEO	Email	Whole organisation	Introducing JESI Value of JESI What's in it for Users What Users can expect next	Week 1
JESI awareness	Strategic Sponsor	Email	Whole organisation	What is coming soon Video link to JESI Overview	Week 2
Project implementation	Ops Managers	Email	Whole department	Reiterating GM email Timelines Training	Week 3

JESI is Live	Team Leaders	Daily Briefing	Team members	Go Live date Expectations Reiterate WIIFM	Week 4
Training schedules	Admin Manager	Email	All Users	Book in for training	Week 4
Feedback	Team Leaders	Daily Briefing	Team members	Feedback	Week 6



**TIP:** Key points to remember when developing your plan:

- **Select credible leaders to deliver the message** – those with rapport and credibility, who are fully informed and supportive of the change.
- **Clarify the WIIFM (What's in it for me) for each stakeholder** – each user needs to know how it will impact them. Think this through and customise your communication for different groups.
- **Face to face as much as possible** – while email is efficient, at a certain point face to face is better, it allows for open communication, questions, feedback etc and has been cited in all studies as the most effective form of communication.
- **Don't be afraid to repeat yourself** – people will need to hear about the change many times in many different ways in order to fully understand and support it. Repetition is not a bad thing.
- **Consistent messaging** – make sure all your messages are consistent, so that the messages from the top are reinforced by all subsequent messages. The messages will get more specific as you get to the team level, but most importantly, they must remain consistent.
- **Keep communicating all the way to the end**
- **Listen to feedback** – As issues, questions and details are hammered out at the implementation level, feedback should be communicated upward about what is working and what needs to be adjusted or addressed. Two way communication is essential.

# Step 10: Develop Action Plan

---

**Responsibility:** Onboarding Team



## Action items

- Complete the [Planning Assessment](#) before moving on to the next step.
- Develop an [Action Plan/Roadmap](#) for members of the Onboarding Team to undertake in their respective departments.

Managers are often closest to employees and face the greatest challenge of the project. They are in charge of translating the change message to their teams. Managers and supervisors must first be onboard with the change themselves to effectively support the onboarding of the change for their employees and having a roadmap will assist them in ensuring that all relevant steps are completed.

### The Roadmap should include the following:

- Commence communication plan
- Confirm roles and responsibilities (key Administrators, Managers, Monitors and Team Members) including Escalation flows, Escalation Contacts and Levels.
- Collate teams for JESI upload
  - [Bulk Upload Teams and Escalation Contacts](#)
  - [User Bulk Upload](#)
- Identify training facilitators and provide resources
- Develop training schedule
- Seek feedback from Users



**TIP:** It is worthwhile spending the time in this first instance ensuring that the Teams and their subsequent Escalations are as accurate as possible for the bulk upload. As any changes are done manually, experience shows that rearranging Teams and Escalations after the fact can be time consuming and tedious.



**TIP:** Mobile phone numbers must be in international format +61 and the initial User experience can be negatively impacted if an email address is entered incorrectly.

### Example Action Plan

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Attend onboarding workshop						
Identify/Confirm staff roles: Team Members Monitors Managers Administrators						
Confirm Teams Escalation Flows Escalation Contacts Escalation Levels						
Collate Team data and forward to Strategic Sponsor						
Identify training facilitators						
Develop training schedule						
Seek approval for training schedule						
Commence training						
Seek feedback from Team Leaders/Users see Phase 5						

Managers can impact project success by intentionally providing time, resources and coaching to help employees impacted by the change. Managers must also establish a safe and supportive environment and provide clear feedback channels to quickly identify gaps in processes or tools.



# Step 11: Reporting and Statistics

---

**Responsibility:** Onboarding Team



## Action item

Develop your Reporting plan.

---

To assist in making astute business decisions, take a deeper look at the data available and how it can be used to your advantage.

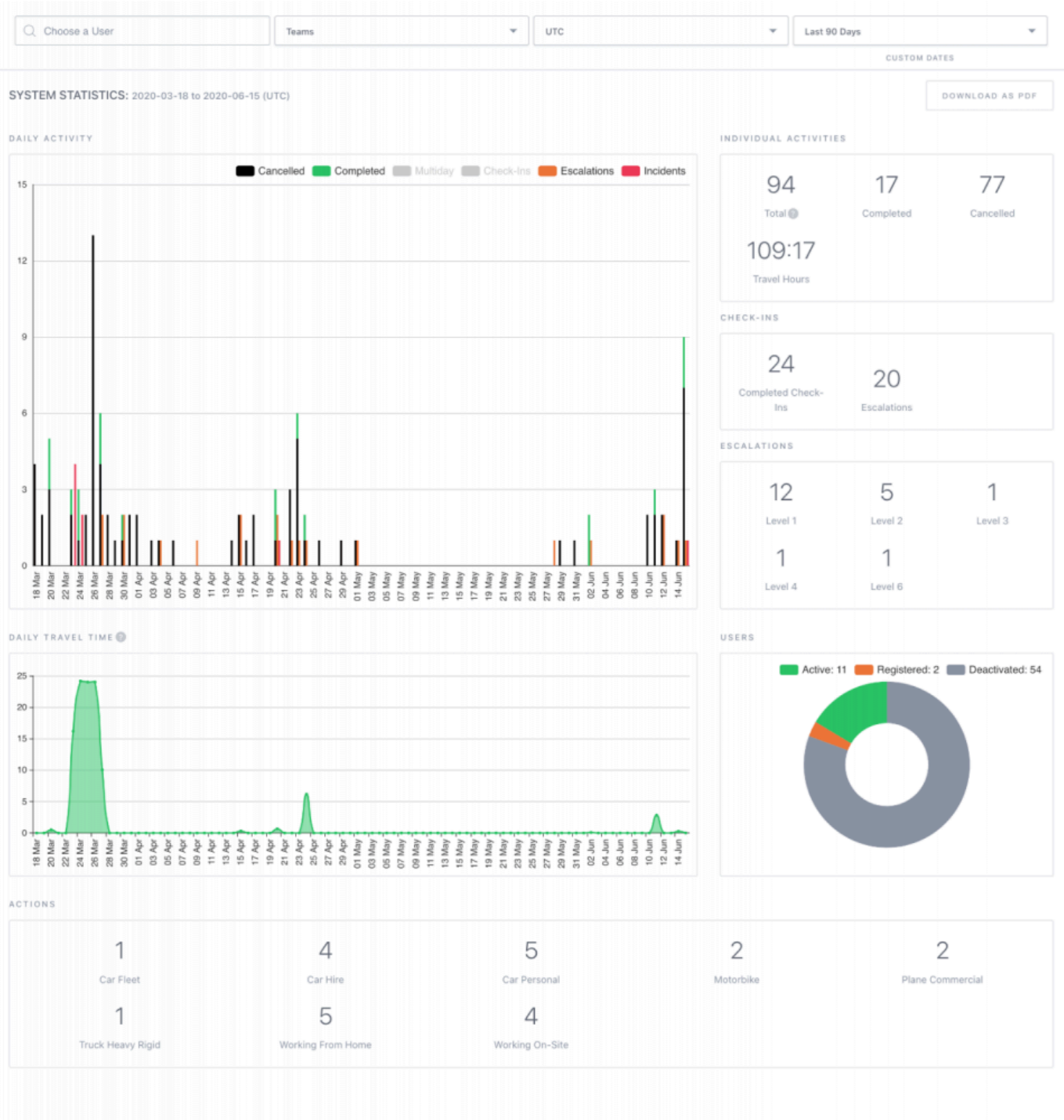
- [System Statistics Monitoring Plan](#)
- [System Statistics Follow Up Plan](#)

Our data can assist in generating strategic, data driven insights to:

- Inform and improve decision making
- Refine operations – create efficiencies and cost cutting
- Observe and assess user patterns and trends
- Analyse performance and organisational behaviours
- Forecast and plan
- Assess risks

As a standard feature you have access to data on:

- Individual Activities: total, completed, cancelled, travel hours
- Completed Check-Ins
- Escalations and Escalation levels
- A breakdown of Actions completed



As an advanced feature, speak to us about API integration and advanced data analytics. The raw data captured in JESI can be data mined and we can provide you with alternatives in managing your data proficiently.

# Phase 3 Confirmation

---



# Step 12: Gain approval for plan

---

**Responsibility:** Strategic Sponsor



**Action item**

Seek approval of the Action Plan from the CEO or delegate.

---

# Step 13: Collate User data

---

**Responsibility:** Strategic Sponsor



**Action item**

[Collate Teams and Escalation](#)

---

# Step 14: Upload User data

---

**Responsibility:** Strategic Sponsor



**Action item**

[Upload your Users into the JESI system](#)

---

# Step 15: Set up Custom Locations

---

**Responsibility:** Strategic Sponsor



**Action item**

If relevant, set up your Custom Locations at this time.

---

# Phase 4 Training

---





## Step 16: Prepare to deliver training

---

**Responsibility:** Training Facilitators



### Action item

- Prepare for the roll out of the training
- Familiarise yourself with the JESI product
- Finalise your training schedule
- Book training facilities ie rooms, equipment
- Email training participants
  - [JESI introduction email](#)
  - 24hrs prior to the scheduled training, send an email to all [Users](#), [Managers and Monitors](#) (Escalation Contacts), asking them to activate their account before their training session. It would also be helpful, at this time, to include video links for them to peruse, that are appropriate for their role. eg How to add JESI to phone home screen, How to create an Activity etc

# Step 17: Deliver training

---

**Responsibility:** Training Facilitator



## Action item

Conduct training for the different permission levels.

---

Training presentations can be found online:

- **Administrators**

An Administrators responsibility is to control the integrity of the JESI software and to ensure the organisational policies are adhered to.

Administrators have complete access to JESI's functionality (and includes: 'Create Users', 'Manage Users', 'Create New Managed Activities', 'Create Teams', 'Manage Teams', 'Manage Escalation Levels', and can view both the 'User Activity' and 'System Statistics' Reports. Discuss the data available in JESI and how it will be used and distributed within the organisation.

- **Managers & Monitors**

Managers & Monitors are Users with some level of responsibility who will be responding to Escalations. The main function of being a 'Monitor' is the ability to create an Activity for other Users, monitor their travel status and respond to Escalations. Monitors do not have permission to perform functions for Teams that they are not attached to. A Manager's responsibility is to manage the Users in their Teams.

Managers have permission to create Users, add Users to their Teams, create and manage Activities and view User Activity and System Statistic Reports, for the teams that they are attached to. If Managers are not attached to a Team they will not be able to view or perform functions for that Team. Managers can attach Active Users to their Team/s.

- **Team Members**

Team members are employees using JESI, following company processes, but with no extra responsibilities. Team Members are responsible for creating and editing their Activity details. They are also responsible for Checking-In when they arrive at their various locations.



**TIP:** Making the right resources available to staff greatly enhances the development of new skills. Ensure employees know where they can go for help i.e. subject matter experts, support portal etc

## Step 18: Add JESI onboarding to internal Induction Program

---

**Responsibility:** Strategic Sponsor



### Action item

Liaise with Learning & Development/HR and incorporate JESI onboarding into the organisation's Induction Program.

---

This is a fundamental step in ensuring that the JESI process is a sustainable part of the organisation's future.



**TIP:** Many organisations invest significant time and energy in building the necessary awareness, desire, knowledge and ability for change to be successful. For a change to deliver the expected results over time it must be actively sustained.

# Phase 5 Evaluation

---



## Step 19: Seek Feedback internally

**Responsibility:** Strategic Sponsor/Onboarding Team



### Action item

Design and roll out User surveys.

- [User survey](#)
- [Monitors and Managers survey](#)



**TIP:** Keep it quick. Shorter surveys produce higher response and completion rates.

The organisation needs to know if people have adopted the change as designed and if the implementation process has gone according to plan. Evaluation provides information on where the change has succeeded, so you can recognise and reinforce new behaviours. It also provides information on where the change has not succeeded, so corrective action can be applied. Commit to following up on the feedback you collect. Feedback is only valuable when you use it to make positive change. Turn your feedback into data and data into action.

The evaluation phase, while highly valuable, is possibly the most challenging of all the phases, as the gathering of feedback is no easy task. We have provided you with templates to assist, however your HR department may also provide guidance and/or a template they have previously used when collecting feedback. Either way, it is important to consider the following when developing and/or distributing your feedback surveys:

- **Define your goals for the feedback**  
What do you want to know and what are you going to do with the feedback
- **Identify who you want feedback from**  
Which user groups will give you the information you need to meet your goals.
- **Prepare your questions**  
If you ask vague questions, you'll more than likely receive vague answers.  
Will your questions be open-ended, multiple choice or a rating

- **Ask for feedback in the right way**

At what stage of the project is the best time to ask

Will Email Surveys, Face to face interviews or team meetings elicit the best response

Should there be an incentive for completing



**DID YOU KNOW:** We can customise a User Experience survey for you within the JESI product.  
Contact our Customer Solutions team to find out more.

## Step 20: Provide feedback to JESI

---

### Before you go

Now is also the perfect time to provide JESI with your feedback on the support you have received during your onboarding process. We will always welcome and value feedback in our bid to continue providing outstanding customer service.

- Did you use the JESI Onboarding Handbook during your implementation process? If yes, How would you rate the effectiveness of the onboarding handbook?
- Could you find the information you required during the onboarding process? If not, what were you looking for?
- Did we meet your expectations?
- How would you rate the support you received during the onboarding process?



# Part 2 – Onboarding Templates

---

## Phase 1: Pre-planning

- [1.1 – Onboarding Checklist](#)
- [1.2 – Onboarding Schedule](#)
- [1.3 – Scope](#)
- [1.4 – Email to Onboarding Team](#)
- [1.5 – Meeting Agenda](#)

## Phase 2: Scope and Development

- [2.1 – JESI Demo](#)
- [2.2 – Organisational Change](#)
- [2.3 – JESI Definitions and Permission Levels](#)
- [2.4 – Working From Home Risk Assessment](#)
- [2.5 – Basic Trip Risk Assessment](#)
- [2.6 – Intermediate Trip Risk Assessment](#)
- [2.7 – Advanced Trip Risk Assessment](#)
- [2.8 – Journey Creation Flow Chart](#)
- [2.9 – Working From Home Creation Flow](#)
- [2.10 – Lone Worker Creation Flow Chart](#)
- [2.11 – Working On-Site Creation Flow Chart](#)
- [2.12 – Escalation Flow Chart](#)
- [2.13 – Team Structure and Escalation Levels Contacts](#)
- [2.14 – Onboarding Team Communication Plan](#)
- [2.15 – Planning Assessment for Onboarding](#)
- [2.16 – Departmental Action Plan Roadmap](#)
- [2.17 – Bulk Upload Teams and Escalation Contacts](#)
- [2.18 – User Bulk Upload](#)
- [2.19 – System Statics Monitoring Plan](#)

- [2.20 – System Statistics Follow Up Plan](#)

## Phase 4: Training

- [4.1 – Training Email Introduction](#)
- [4.2 – User Activation Email](#)
- [4.3 – Manager/Monitor Activation Email](#)
- [4.4 – Administrator Training](#)
- [4.5 – Manager and Monitor Training](#)
- [4.6 – Team Member Training](#)

## Phase 5: Evaluation

- [5.1 – User Survey](#)
- [5.2 – Monitors and Managers Survey](#)

## Other Handy Onboarding Documents

---



[Poster Checkin A3 Print Version](#)

[Poster Checkin A4 Print Version](#)

[Poster Checkin A5 Print Version](#)