Woodland Learning Solutions, LLC

Proposal for

SquidFin

Initial Onboarding Program

Goal Setting and Performance Expectations

October 16, 2024

Prepared for
Olive
SquidFin

Prepared by
Michelle Woodland
Woodland Learning Solutions

Table of Contents

Consultant Bio

Michelle J. Woodland
Learning Strategy Consultant

I love designing learning experiences that increase both business results and employee growth. By creating meaningful, accessible, and engaging training solutions, I help organizations cultivate a culture of continuous development.

My background spans industries such as financial services, hospitality, and technology, allowing me to bring a strategic, well-rounded approach to every project. I focus on aligning learning solutions with company objectives while addressing the needs of employees.

Tailoring learning solutions starts with understanding a company's unique culture, challenges, and goals. My approach centers on close collaboration, ensuring that any training or onboarding program is built to address specific needs. This client-focused strategy has led to measurable success, from establishing performance milestones for new hires to building career development plans that drive employee engagement and retention.

As the founder of Woodland Learning Solutions, LLC, I've partnered with fast-growing startups and Fortune 500 companies, focusing on scalable and sustainable learning strategies. From onboarding programs to performance management, I prioritize measurable results and ensure that employees have the tools they need to succeed from day one. My goal is to empower teams and support their long-term development while driving organizational success.

Learner Persona

Kylie - Principal Quantitative Analyst

Job Role: Principal Quantitative Analyst at SquidFin

Kylie is responsible for identifying model risks and implementing automation solutions to improve business performance and efficiency. She analyzes complex data sets to enhance decision-making processes and optimize workflows.

Age: 38 years old

Region: Based in the United States, remote with occasional office visits.

Education: Bachelor's Degree in Data Science; Master's Degree in Financial Engineering.

Learner Bio:

Kylie is a seasoned data analyst with 12 years of experience in the financial industry, recently transitioning to her role at SquidFin. She thrives in fast-paced environments where she can apply her analytical skills to drive business performance. While she enjoys solving complex problems, Kylie has encountered onboarding challenges at SquidFin, specifically around understanding internal systems and identifying the right collaborators. She's highly motivated to make an impact but seeks better resources and clearer pathways for collaboration within the company.

Tech Savviness: High level of proficiency in quantitative analysis tools and data management software (Python, R, SQL). Comfortable with backend systems but faces challenges navigating new internal platforms such as SquidWork and DeepSea without guidance.

Pain Points:

- Lack of structured onboarding: Kylie struggled to understand internal systems during her first weeks at SquidFin, leading to frustration and decreased productivity.
- Inefficient collaboration: She finds it difficult to identify the right people for her needs, especially when dealing with cross-functional teams.
- System navigation challenges: The absence of accessible resources, such as a knowledge base or demo videos, makes it hard for Kylie to learn new tools on her own.

Goals:

- Master internal systems like SquidWork and DeepSea to reduce dependency on others.
- Drive automation initiatives to streamline processes and improve business performance.
- Build stronger collaborative relationships within the company to enhance teamwork and project outcomes.

Motivations:

- Kylie is motivated by achieving process efficiencies and making tangible improvements in business operations.
- She enjoys problem-solving and leveraging data to uncover insights that drive decision-making.

Inspiration:

- Innovative leaders in the finance and tech industries, particularly those who have successfully implemented data-driven automation solutions.
- Colleagues who share knowledge and support her in navigating internal challenges.

Apathy Triggers:

- Poorly structured training or onboarding experiences that leave her feeling unprepared.
- Redundant or outdated processes that limit her ability to innovate or work efficiently.

Design Document
SquidFin Initial Onboarding Program

Executive Summary

SquidFin is rapidly growing and aiming to expand its workforce from 180 to 250 employees in the next 1–3 months. Given this growth, it is essential to streamline key components of the onboarding process for new hires, particularly in the area of goal setting and performance expectations. To accommodate the tight timeline, the initial focus will be on establishing clear, actionable performance goals and facilitating the creation of individualized growth plans for new employees.

Project Goal

Establish one-month and six-month performance expectations with managers during the first week, while allowing the growth plan to evolve as employees settle into their roles. This will ensure that new hires have clear, attainable targets and feel supported in their career development.

1. Streamline the goal-setting process.
2. Ensure performance expectations are clear and actionable.
3. Lay the foundation for longer-term growth and development.

Project Success Statement

The goal-setting phase of the onboarding process will be considered successful when new hires:

1. Collaborate with their manager to set 3–4 key performance goals within their first week.
2. Develop a draft of a longer-term individualized growth plan within 1–2 weeks.
3. Engage in regular check-ins with managers to review and adjust goals as necessary over their first six months.

Project Team

Key Stakeholders: CEO, COO, Director of HR
SMEs: Principal Quantitative Analyst (Kylie), HR Business Partners, Department Managers
Learning Strategist/Designer: Michelle J. Woodland
Content Development Team: Instructional designer, eLearning developer, graphic designer, editor

Learner Population

1. New hires across all departments, including IT, data analytics, sales, and HR.
2. Managers responsible for guiding their team members through the performance planning process.

Findings & Recommendations

Problem

While SquidFin is working to streamline its overall onboarding process, the immediate challenge is that new hires lack clarity around performance expectations and long-term development, which can impact their confidence and early productivity.

Root Causes

1. Unclear Performance Expectations: New hires are unsure of short-term objectives and performance metrics.
2. Lack of Formalized Growth Planning: There is no structured process for employees to create growth plans early on.

Obstacle/Solution	Training Initiatives	Learning Strategy/ Delivery Method
Time Constraints: Managers may struggle	Performance Goals Workshops: 60-minute	Actionable Goal-Setting: Each new hire will leave their first

to find time for goal-setting meetings. Solution: Provide managers with a streamlined, easy-to-follow process that can be completed in 60 minutes or less.	virtual or in-person meeting where managers and new hires collaboratively establish initial performance goals (3–4 measurable goals for the first 1–3 months).	meeting with their manager with specific, measurable goals. Goal setting meeting conducted in a live workshop format: For managers and new hires to set performance goals together
Consistency Across Departments: Some departments may interpret performance expectations differently. Solution: Use a standardized template for all managers to ensure consistency across departments.	Goal Setting Template: Provide a standardized template for managers and new hires to complete during their first meeting. This template will include fields for short-term (one-month) and medium-term (six-month) performance goals, as well as space for initial growth plan discussions.	Templates & Resources: New hires and managers will be provided with easy-to-use templates that guide goal-setting conversations and allow for ongoing documentation of progress. Self-paced templates and prompts: For ongoing growth plan development.
Managers don't want to conduct performance reviews because it is attached to pay Solution: implement an ongoing, collaborative process focused on career growth	Guided Conversations: Offer prompts and guidelines for managers to help new hires think about long-term career development. These conversations will be revisited at the one-month and six-month marks.	Train-the-Trainer for Ongoing Manager Support: Managers will receive training and a guide on how to conduct these goal-setting meetings and provide continuous feedback. A blend of synchronous (live) and asynchronous (self-paced) learning: A live workshop

		followed by online modules for reinforcement
Follow-Through on Growth Plans: Without regular check-ins, growth plans may not evolve as intended. Solution: Use SquidFin's HR system to automate reminders for managers to revisit and update goals at key milestones.	Follow-Up Mechanism: Build in automatic reminders through SquidFin's HR system to ensure managers schedule check-ins with their new hires at the one-month and six-month milestones.	Reflection and iteration: managers and employees with need to revisit goals to see if they are still relevant and assess progress toward achievement Reminders in the HR system for managers and employees to revisit goals and monitor progress

Branding

The branding for this phase of onboarding should remain consistent with SquidFin's playful and professional tone:

1. Visuals: Incorporate SquidFin's logo, brand colors, and fonts into all goal-setting templates and resources.
2. Tone: Maintain an encouraging and future-focused tone in all written materials, emphasizing growth and collaboration.

Key Terms & Resources

1. Performance Goals: Specific, measurable, and time-bound objectives new hires must achieve within the first few months.
2. Growth Plan: A flexible and evolving plan that outlines long-term career goals and milestones.
3. Goal Setting Template: A document used by managers and new hires to formalize performance goals and initiate growth plans.
4. Check-In Schedule: Pre-set reminders for managers to check in with new hires at critical milestones (1 month, 6 months).

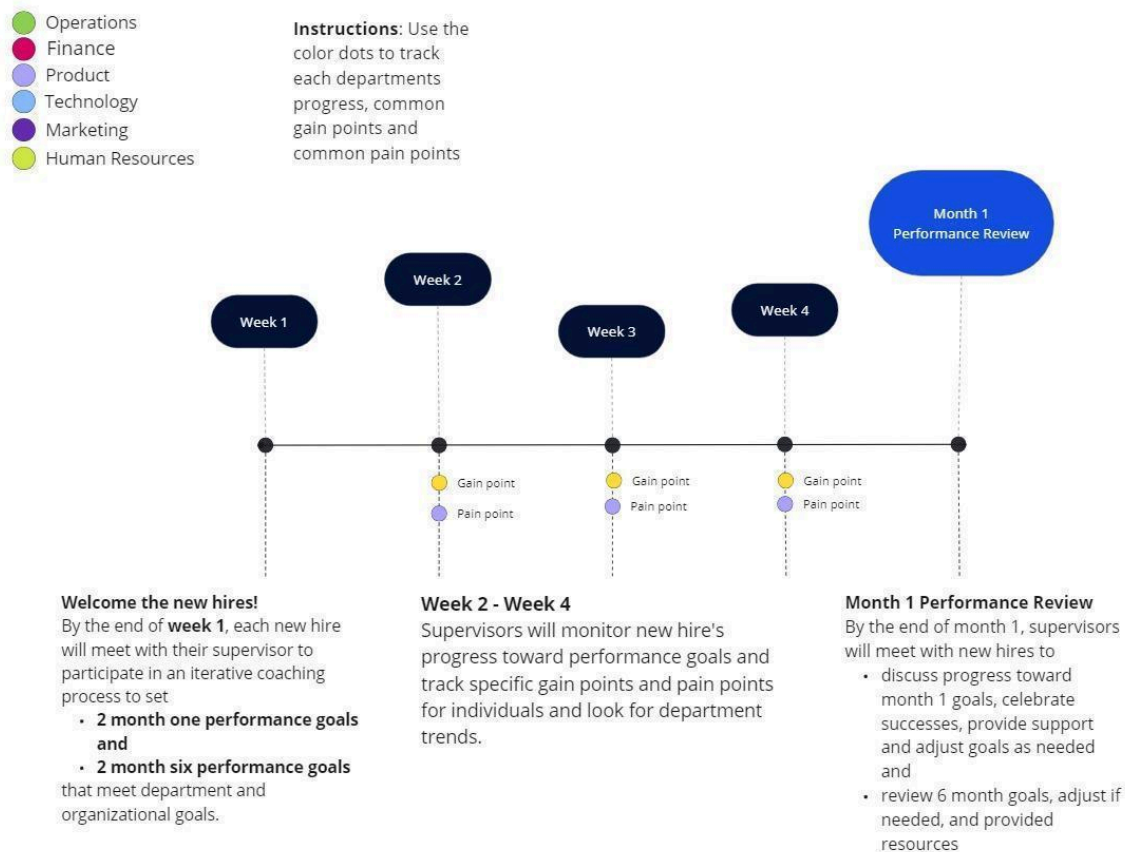Onboarding Timeline (See Sample Check-in Schedule for more detail)

Week 1: Establish 3–4 key performance goals with the manager.

Week 2: Draft an individualized growth plan.

Month 1: Conduct a formal check-in to review goals and growth plan.

Month 6: Revisit the goals and growth plan to assess progress and make adjustments as necessary.

Sample check-in schedule

Operations
Finance
Product
Technology
Marketing
Human Resources

Instructions: Use the color dots to track each departments progress, common gain points and common pain points

Month 1 Performance Review

Week 2

Week 1

Week 3

Week 4

Gain point
Pain point

Gain point
Pain point

Gain point
Pain point

Welcome the new hires!
By the end of **week 1**, each new hire will meet with their supervisor to participate in an iterative coaching process to set
- **2 month one performance goals** and
- **2 month six performance goals**
that meet department and organizational goals.

Week 2 - Week 4
Supervisors will monitor new hire's progress toward performance goals and track specific gain points and pain points for individuals and look for department trends.

Month 1 Performance Review
By the end of month 1, supervisors will meet with new hires to
- discuss progress toward month 1 goals, celebrate successes, provide support and adjust goals as needed and
- review 6 month goals, adjust if needed, and provided resources

Scope of Work: SquidFin Initial Onboarding Program

Snapshot of Deliverables: Goal Setting and Performance Expectations

Phase 1: Needs Analysis

- 1 Content Playbook (5–7 pages) Branding, colors, tone/voice, and key terms.

Phase 2: Curriculum Development

- 1 Goal Setting Template (fillable PDF)
- 1 Manager Training Workshop:
  - Slides: 20–25 PowerPoint slides
- Participant Workbook:
  - Up to 25 pages (includes exercises and goal-setting activities)
- Facilitator Guide: 8–10 pages (step-by-step instructions)

Phase 3: Manager Training Development

- 3 Microlearning Modules
  - Up to 15 screens per module with basic interactivity (level 2)
  - Knowledge checks and downloadable resources (PDF format)
- Manager Training Workshop
  - 1 Participant Workbook (25 pages)
  - 1 Facilitator Guide (10 pages)

Phase 4: Learner Experience (LX) Content Development

- Growth Plan Drafting Template: 1 evolving document (fillable PDF)
- Manager Support Resources:
  - 10 conversation prompts for ongoing check-ins
  - 2 follow-up checklists (for 1-month and 6-month reviews)

Phase 5: Upload/Implementation

- 6 Nudge Emails (automated reminders)

Phase 6: Project Management and Meetings

- Weekly project management and coordination meetings with stakeholders.
- Ongoing communications to ensure timelines and deliverables are met.

Scope of work: detailed descriptions and timelines.

Phase	Title	Description of Services	Estimated Hours
1	Needs Analysis	- Conduct a discovery call with key stakeholders to gather preliminary data on the current onboarding challenges and the learner population. - Perform research on best practices for goal setting in fast-growing technology companies. - Interview subject matter experts (SMEs) and key stakeholders, including the CEO, COO, Director of HR, and Department Managers. - Analyze findings from the interviews and research to define the critical areas for improvement in the onboarding process. - Develop an internal content playbook in collaboration with the SquidFin team to ensure consistency in branding (colors, tone/voice, keywords).	50 - 60
2	Curriculum Development	- Create an outline for the goal-setting module that will be used by managers and new hires during the onboarding process. - Develop performance goal-setting templates and guides for use during live workshops and ongoing goal reviews. - Design materials that include prompts for managers to facilitate goal-setting conversations and check-ins. - Incorporate feedback from key stakeholders (e.g., HR and department managers) in 2 rounds of revisions.	15 - 20

3	Manager Training Development	● Design a 60-minute live workshop for managers, introducing them to the new goal-setting process, including how to use the provided templates and engage in goal-setting discussions. ● Develop self-paced online modules that reinforce the key learning points from the live workshop. ● Create supporting documents, such as conversation prompts and HR reminders, to ensure managers stay aligned with SquidFin's career development goals for new hires.	72
4	Learner Experience (LX) Content Development	● Develop step-by-step instructional content for managers on how to use goal-setting templates and conduct performance reviews. ● Draft workbook content with key concepts and practical activities for new hires to track their progress toward achieving short-term (one-month) and medium-term (six-month) performance goals. ● Conduct two rounds of revisions based on feedback from the HR team and department managers.	288
5	Upload/ Implement	● Upload all onboarding content (templates, workshops, and modules) into SquidFin's Learning Management System (LMS). ● Configure the backend settings, including automated HR reminders and check-in prompts for managers and new hires.	5

6	Project Management & Meetings	● Coordinate project timelines, ensuring deliverables are submitted on time and aligned with SquidFin's growth plans. ● Attend weekly project meetings to review progress with key stakeholders. ● Manage ongoing communications and feedback loops to ensure the project stays on track and meets the agreed-upon goals.	60
TOTAL			490 - 505
ESTIMATED COMPLETION TIME			25 weeks

Review Schedule:

- Review 1: Accuracy & Style Pass – Ensure all materials align with SquidFin's branding and organizational tone.
- Review 2: Approval Pass* – Collect final approval from stakeholders after incorporating requested changes from Review 1.

*If excessive reviews and/or change requests are requested, cost may go up. These include large style changes requested during Review 2.