



true lark

4-Day Employee Training Plan

Retain your staff and grow your business

Preparation

Your Front Desk plays a major role in creating a positive first impression for your clients. They keep the ship sailing smoothly, they sell memberships, provide customer service, and can give you confidence and freedom to step away from your business. In order for them to deliver these results they will need training.

There is so much to think about when running a business. Training your newest staff members is a job in itself. You can spend hours hiring and training employees and turnover will happen. But with proper training, benefits, and hiring the right people you can benefit from the powers of a well oiled front desk staff.

Start your team off on the right foot with a proper training program and the tools they need to keep your business running even when you're not there.

Learning Process

What does it mean for someone to learn a new skill?

Learning is about:

- Understanding the core of what you need to learn (cut the fluff)
- Applying it to real-world situations immediately
- Receiving immediate feedback and refining your understanding
- Repeating the cycle



Reflect & Relate

Give trainees something to relate to.

Have your staff bring their past experience to training to tie that knowledge to what they will learn.



Tell & Show

Tell your trainee what they are going to learn and the purpose behind why they are going to learn it.

Then show them what good looks like.



Do

Have the trainee practice what they are learning.

Role play, do an activity, have them complete the task.

Review and Feedback

Provide specific feedback on what they did well and what can be improved upon. Provide feedback often and in a timely manner. Consider assessments or in person shadowing to determine the trainees proficiency.



6-Ways People Learn

Training isn't about talking at people. It is connecting what they already know to what they are about to learn. Personalizing the experience to meet their unique learning style. Here are six ways that people learn according to [Skills You Need](#).

- ✓ **Linguistic Learner:** The linguistic learner is one who learns best through linguistic skills including reading, writing, listening, or speaking or a combination of these methods.

For example, if a linguistic learner wanted to tackle a new skill, their best method of learning would be to read about it, then listen to an audio recording and take notes on it. Finally, concretizing it would require speaking about it and, possibly, writing about it extensively.

- ✓ **The Kinesthetic Learner:** The Kinesthetic learner is a person that learns best by actually doing something.

These people are also scientific in nature and must interact with objects in order to learn about them. They want "hands-on experience. and learn well from apprenticeship or shadowing experiences.

- ✓ **The Visual or Spatial Learner:** A visual or spatial learner is a person who learns best if there are visual aids around to guide the learning process.

For example, someone who can learn best from diagrams, pictures, graphs would be a visual or spatial learner.



✓ **The Logical or Mathematical Learner:** The logical or mathematical learner must classify or categorize things.

They also tend to understand relationships or patterns, numbers and equations, better than others.

✓ **The Interpersonal Learner:** The interpersonal learner is someone who learns by relating to others.

Often, these people share stories, work best in teams, and compare their ideas to the ideas of others. In a sense, others help them think of new ideas of their own. They are often naturally good leaders as well as team players.

✓ **The Intrapersonal Learner:** The intrapersonal, as opposed to interpersonal, learner is someone who works and learns best when they are alone.

They set individual goals that are challenging, but not impossible. They are also motivated by internal forces, rather than external ones. They are often introverted individuals, but not always.

KEY POINT

Many people are more than one type of learner. That is why it is important to provide multiple methods to learn new information for your new employees.

How AI Learns

✓ **The Onboarding Process:** When you first start to use Artificial Intelligence (AI) you provide upfront training just like you do for your employees.

At True Lark, this process begins during onboarding. Tell us about your business, input FAQs, and add custom filters for a unique booking flow you'd like to follow.

✓ **Your Booking Software:** Through technology partnerships, your Virtual Front Desk Assistant will be able to pull information directly from your booking platform.

Information like schedules, staff members, class or appointment descriptions, pricing options, etc.

✓ **Experiential learning:** AI learns through experiences, just like humans. The more conversations it handles the more automated the process becomes.

Experiential learning comes from:

- total number of conversations held
- input and feedback from the business owner
- input and feedback from an AI Trainer

Think of the process like training a dog. When a dog is young it needs positive reinforcement to know it is doing the right thing (like a treat)! AI is the same. When AI does something correctly, it needs human confirmation for accuracy. Overtime human input is needed less and less and the AI will correctly perform the task on its own.



Did you know?

We quickly forget what we've learned. Like first year college students who [forget 60% of what they learn in high school](#), studying merely to get the CPE credit suggests that employees, too, will quickly forget what they learn.

German psychologist Hermann Ebbinghaus pioneered experimental studies of memory in the late 19th Century, culminating with his discovery of "[The Forgetting Curve](#)." He found that if new information isn't applied, we'll forget about 75% of it after just six days.

4-Day Training Plan

Day 1 Training Plan

The first day at any job can be overwhelming. Ease your newest employees into their environment. Have their first day be informational and interactive. A good goal on their first day is to have them leave feeling excited about their decision to join your team. Here are a few ideas of items to be completed on their first day.

Complete all required paperwork

- I-9
- W-4
- Direct Deposit
- Employment Agreements
- Working with chemicals, consider a [Hazard Communication Standard: Safety Data Sheets](#)

Welcome them to the team

- Break the ice with an activity that lets them get to know their fellow new hires or even current employees.
- Educate them on the background of your company. Who are you? What do you offer? What is your story? Who owns the business? Foundational/tribal knowledge helps new hires feel like they are apart of the team.

TIP

Ask them to share what they already know. It gets them to participate and you can get a better idea of their current knowledge.

Set up expectations

- Tell them how and when they are going to get paid.
- Talk about benefits. Do they get free fitness classes? Discounts off beauty products? Etc.
- Review Employee Handbook.
- Set ground rules about requesting time off.

TIP

Provide an Acknowledgement and Agreement that states they've read your employee handbook and agree to it.

- Other topics you can cover during the first training: disciplinary policy, attendance and punctuality policy, etc.
- Provide a list of key contact incase of an emergency. (if they are locked out, if equipment breaks down) Who can they call if they can't reach you? (vendors, staff members, etc.)

Training tracker

- Have a Training Checklist for each team member to empower them to self-guide their training process.
- Binders can be useful for all training material and a printed schedule keeps everyone informed on what's to come.
- Review your upcoming training schedule with your team.

Tour the space

- Show them around! High-level tour of the space and provide additional background on the business
- Tell them where the bathrooms are. Where they can find water
- Where to park
- Address these worries early on so they can focus and get comfortable right away.

Do something fun!

- If you're a fitness studio, invite them to take a class at the end of the training.
- Feed them lunch!
- Finish day one with the group feeling excited.

WATCH OUT FOR

Keep in mind that employment laws are different in each state. The paperwork your employees need to complete, required breaks, and other employment laws should be considered when designing your training program.

Day 2 Training Plan

Focus day two on the day-to-day work of the Front Desk staff. What are they going to be doing? What do they need to know? Use the notes section to make this specific to your business.

Brand guidelines

The Front Desk should embody your brand and represent it. Communicate branding guideliness, brand voice, etc.

Software training

Break your software training into short session to avoid information overload. If available, use software training programs created by your scheduling software.

Service offering

Introduce the different elements of your service offerings to your team members. Speak to the value, how to sell your service, and strategies around client recommendations. Your front desk is also your front line sales team. Understanding and have experiences with your services is critical.

TIP

If you own a fitness studio have them take all the different classes you offer. If you own a salon, have them try a service or shadow a practitioner. Talk to them about the benefits of the services. How are they different? How is your business different? Why should clients care?

Tour the space

Tour the space again. This time focus on how they will interact with the space as an employee. Examples might include:

- how to lock or unlock the doors,
- turn on the lights,
- where are the suppliers located,
- fitness studio room setup, etc.

Roleplay!

Use the learning process steps from page three to walk your newest team member through:

- the new client process
- your service offerings
- your pricing pitch

A fitness studio may want to educate their front desk staff on the proper way to set a new client up on a spin bike or teach them how to clip and unclip cycling shoes into a bike. A wellness studio may need to teach the front desk how to turn on an infrared sauna. Practice and provide feedback.

TIP

Provide a script/template to get them started. Have them practice setting others in the group up! Consider using other team members to teach them! A cycling instructor could be a great coach to walk them through how they want a new client to get set up and get to know your team better. Consider the 6 different learning styles from above when planning your activities.

NOTES





Day 3 Training Plan

Software training part 2

It is beneficial to break software training into multiple days. Part 2 can focus on another aspect of the software or can include the staff member practicing certain tasks in the software and receiving feedback.

Review task lists and daily operations

Do they know what they are supposed to do when? Make sure they know their resources: how to's, what to do if there is downtime, does your software system have a knowledge base, do you have a knowledge base, the more information you can provide them, the less they will come to you for answers.

Buddy up!

Pair your new team members with a more experienced team member for their first 3-4 shifts. It's time to apply and learn on the job.

The first 1-2 shifts the new team member can shadow the experienced team member. By shift three and four the experienced team member should be handoffs and providing feedback only as needed.

DID YOU KNOW?

When your employees want to learn a new skill, they typically don't Google it or refer to your learning management system (LMS) first; 55% of them ask a colleague.

When you account for the fact that humans tend to learn as they teach, peer learning offers a way to support rapid, just-in-time learning, while strengthening the existing understanding your employees have about concepts.

- The Harvard Business Review

Day 4 Training Plan

Check-in

Have a one on one with the team member to see what they need more training or information on. Ask fellow team members what went well or where there are training opportunities to improve.

Offer an assessment

This can confirm their knowledge on policies and services, and pricing. You have a better idea where your training is missing information and access the team members strengths or weaknesses.

Peer learning

Having your more seasoned employees help to train new employees can improve their own retention of knowledge and strengthen their skills. It can also provide growth opportunities and means for advancement which is important for retention and engagement.

Ask for Feedback

Creating a culture of feedback is very important for a business owner. You won't be able to know or see everything that happens at your business. Ask your team members regularly for feedback on what's working and what isn't.

If you create a culture of feedback from the beginning and have a continuous two-way feedback loop, your employees will be more open to feedback you have for them later down the line.

Need an employee manual?

Many payroll services can provide you with a template or support you in creating this document.

Take time to train

It may be more work up front but will save you stress in the long run.

Batch hire

Cut down on training hours by starting employees at the same time.

This also allows team members to build stronger relationships.

AI Training Checklist

Day 1 Training Plan

Getting your new Virtual Assistant up and running takes less than an hour. During your first onboarding call, our team will walk you through the following tasks.

- Sync with your booking software
- Tell us about your business.
- Set up your preferences
- Create your FAQs
- Create a voicemail greeting
- Optimize your booking software

Day 2 Training Plan

- Set up call forwarding
- Confirm settings

Then your new assistant is ready to go “live”.

Post Training

One of the most valuable aspects of hiring a Virtual Front Desk Assistant from True Lark is the additional AI training provided by True Lark employees.

True Lark AI Trainers monitor and coach your Virtual Assistant. AI Trainers provide feedback when the AI does a task correctly or steps in if it needs additional support and on-the-job training.

Think of the AI Trainers as the best Middle-Manager to ever have worked for you. They handle the training and feedback for you and only reach out if it's outside the scope of what a Virtual Front Desk Assistant can do, the information is unknown, or your client requests to speak with someone over the phone. That means less work for you and a better experience for your clients.

Ready to Kickoff Your Training Program?



Training your staff

Customize this training plan. Make the format work for your business. Have a vision of the experience you want to create for your clients. Include and communicate these elements within your training program.

Consider all the different ways that people learn. Use their past experiences and connect them to new ideas. Provide and ask for feedback regularly. You've got this.

More Support

Think you and your Front Desk Staff could use extra support? Hire a Virtual Front Desk Assistant. Level up your customer service and allow you and your staff to do more.

[Learn More](#)