

# Improve your Volunteer Onboarding with Effective Communications

# Introductions



Melissa Bergin, M.Ed is the Executive Vice President and Lead Training Specialist at Bespoke Software (V Sys One). She is responsible for designing and implementing training programs for clients and blending existing business practices with new process options. As a senior member of the team, she helps develop product strategies and organizational goals. Melissa has a Master's in Education (M.Ed) with a focus on Administration & Supervision from the College of Saint Rose, a Masters in Library & Information Science from the University at Albany, and Bachelors in Communication from Cornell University. She is an active volunteer for Snowball Express and Project Linus.



Lisa LaVigna, D.M. is the Vice President of Business Development & Sales at Bespoke Software (V Sys One). As a lifetime volunteer for a number of organizations focusing on education, the environment and/or children, she recognizes the important role volunteers fill in our society. Lisa has a BA in Public Administration from the State University of New York in Albany, an MBA from Rensselaer Polytechnic Institute, and a Doctorate in Management from the University of Maryland. Lisa volunteers weekly at a women and children's shelter and is a board member and volunteer for a nonprofit that organizes birthday parties for children in homeless shelters.

# Webinar Objectives



Examine the onboarding process through the eyes of a volunteer



Explore Workflow Process Maps / Communication Strategies



Generate ideas for developing (or improving) communications plans

# Great Expectations: Story Time



# Timeline



# 2019 to 2020

- Sept to Dec 2019: Forms (5)
- January 13, 2020: Interview
- January 21, 2020: Fingerprinting
- Feb 7, 2020: Got **Ready to Go!** email
- March 7, 2020: I emailed “what is next step?”

Application

Code of  
Conduct

Confidentiality  
Contract

Rights &  
Responsibilities

Reference  
Form

# 2022 to 2023

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- June 28: Please fill out application
- August 31: Need to complete Onboarding
- Sept: Interview & Fingerprinting
- March 18<sup>th</sup>: Emailed I'm still interested
- March 20: Please fill out application
- April 19: I'm still interested: Got **Ready to Go!** email
- May 7 I emailed what is next step?

# May 9<sup>th</sup> Response: What's Missing?

**From:** [REDACTED]@hslc.org>  
**To:** "ell[REDACTED]"  
**Sent:** Tuesday, May 9, 2023 at 10:30:32 AM EDT  
**Subject:** HSLC Registration

Registration for HSLC was successful. You have recently been registered for a HSLC web based class, and this requires a HSLC account. Just log into the HSLC system to view and take any classes that you are registered for.

Your Email Address is [ell\[REDACTED\]@hslc.org](mailto:ell[REDACTED]@hslc.org)

Your password is : 3o2af3j2w1

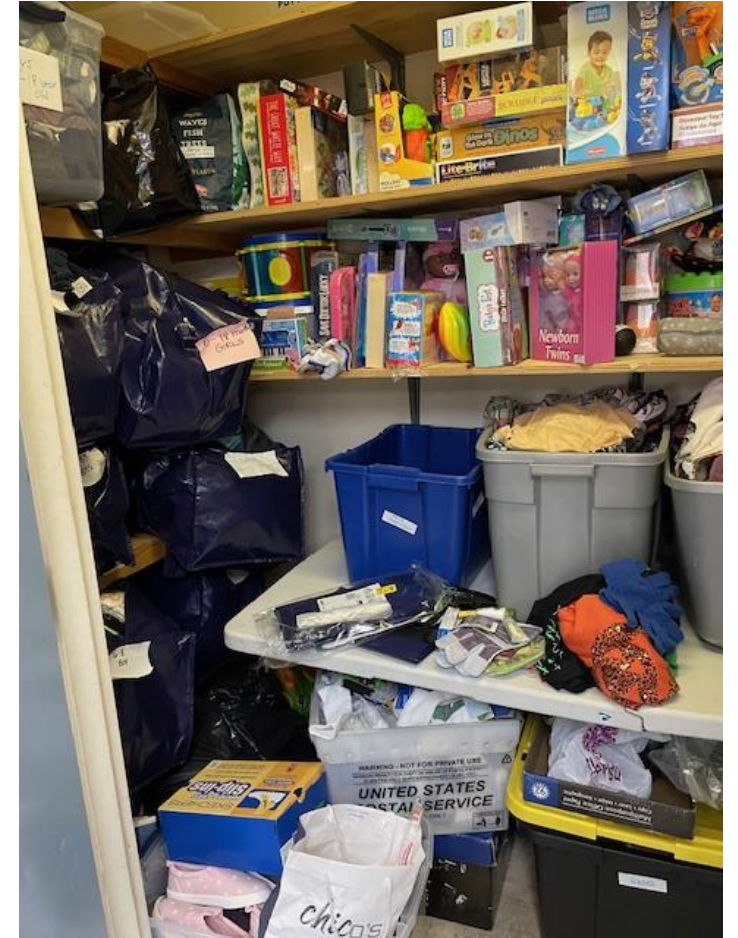
Upon [logging in](#), you should change your password for increased security.

**\*\*If you are having any issues logging in, please contact the HSLC Help Desk 1(800) 413-3210**



# 2022 to 2023

- May – took the four-hour course
- June 2 - signed Code of Conduct form
- June 8 - Started!



# Why do so few applicants become volunteers?

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How could this process be improved?

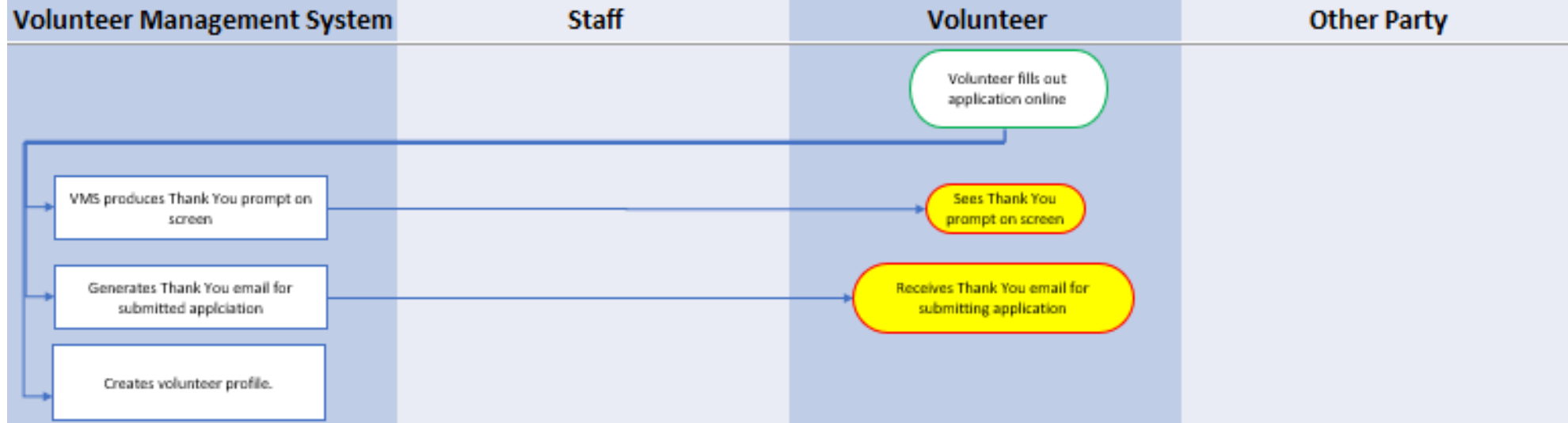
How do we improve the experience for them?

# Evaluating your Onboarding Workflow

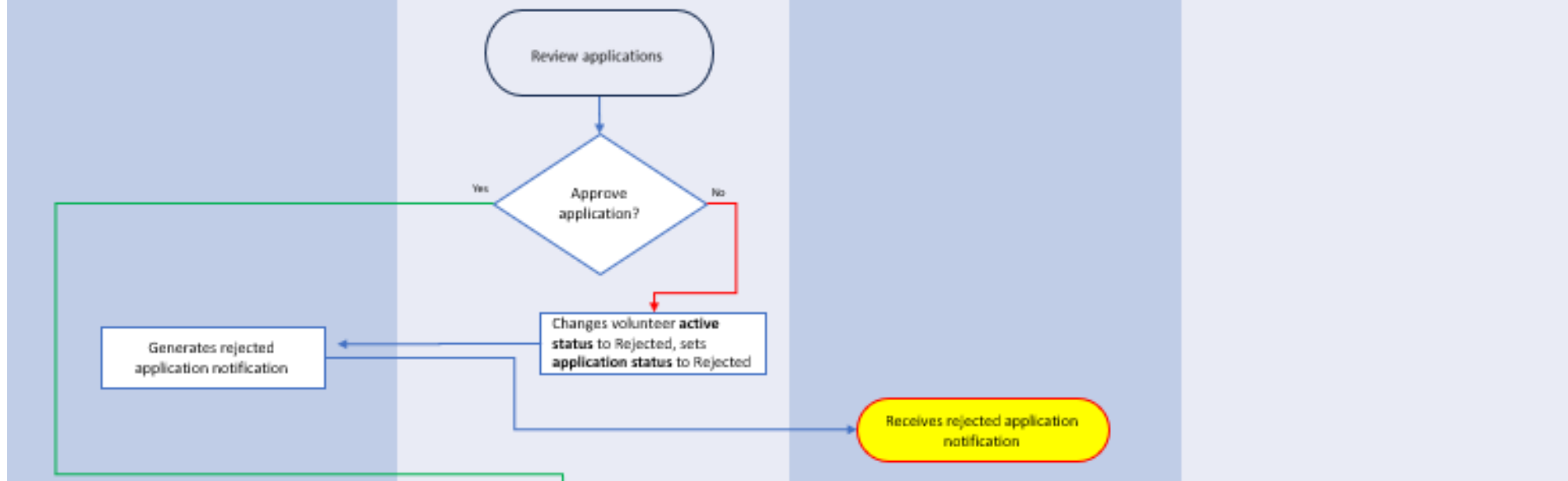


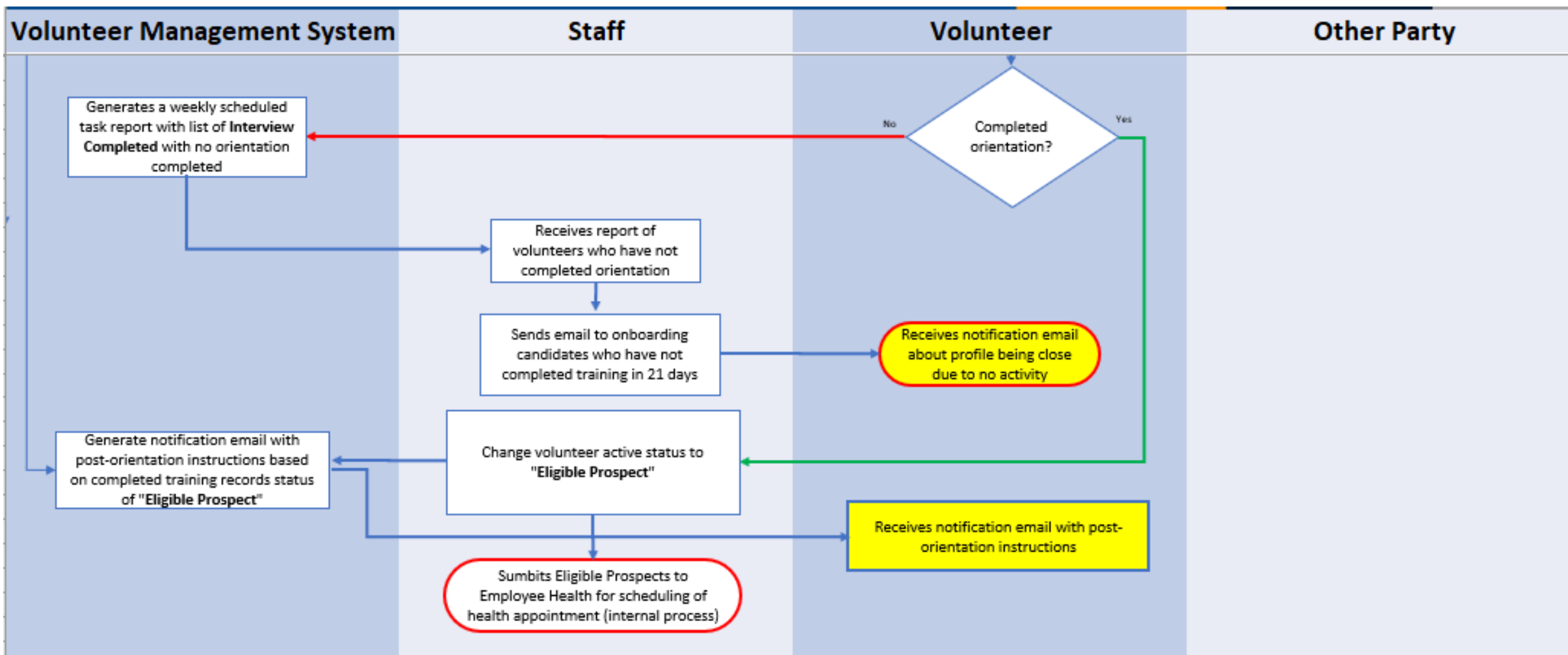
Process Described: Onboarding

### LEGEND



### Initial Status: New Web Applicant

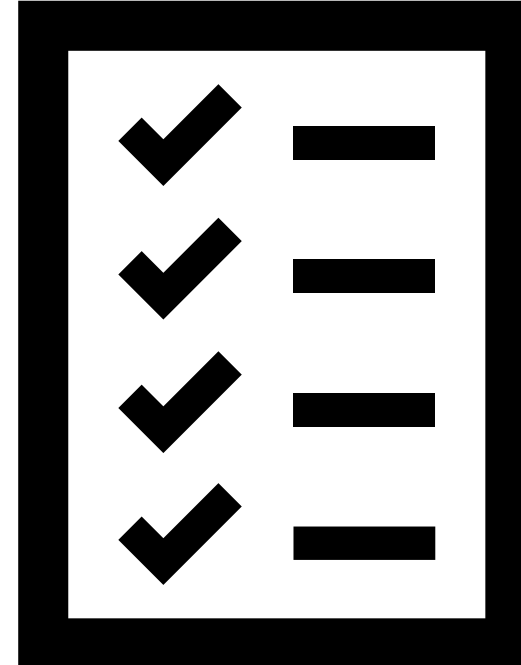




	Volunteer Management System	Staff	Volunteer	Other resources
<b>Step 1 - Volunteer Application</b>				
			Fills out an application	
	Produces thank you message		Sees thank you message	
	Sends thank you email		Receives thank you email	
	Creates volunteer profile			
<b>Step 2 - Review Application</b>				
		Reviews application		
If no		Changes volunteer status to Rejected		
	System generates Rejected email		Volunteer receives rejected email -END	
If Yes		Changes volunteer to Prospect	Continues to Interview step	
<b>Step 3 - Interview</b>				
		Sends email to invite volunteer to interview	Volunteer receives interview invite/sign up instructions	
			Volunteer schedules interview online	
	Sends interview confirmation to volunteer		Volunteer receives interview appt information	
		Interview happens	Interview happens	
If no		Records interview as negative		
	Sends email for not going forward		Volunteer receives email not going forward - END	
If yes		Records interview as positive		

# Evaluate Your Communications Strategy

- Thank the volunteer for submitting application.
- An overview of your volunteer program with requirements. Include onboarding requirements with instructions for accessing onboarding materials, training, and orientation
- Emails as each step is completed with instructions for next step
- Emails every two weeks if steps aren't being completed with reminder
- Once complete, welcome message with contact details for getting in touch with you



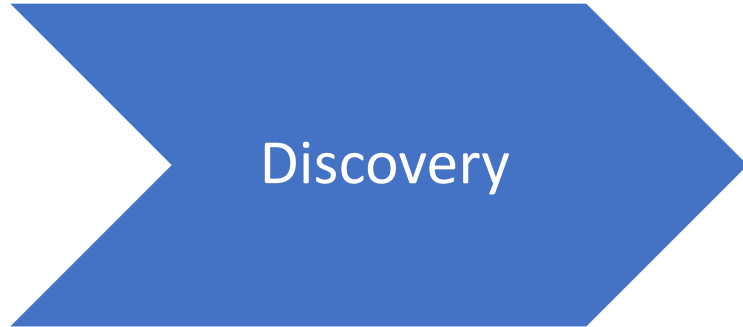
# Creating a Communications Plan for applicants





# Phase 1: Discovery

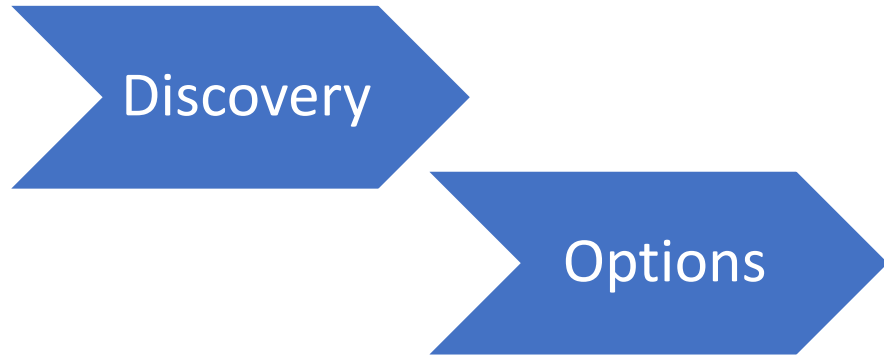
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- Review onboarding process
- Identify milestones that need to be completed
- Examine / update existing communications
- List stakeholders you may need for revising/creating communications
- How will you evaluate if it is working?

# Phase 2: Explore different communications strategies

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- What are key communication points
- What mechanisms do we have for communicating?  
Which works best when?
- What can be automated?
- What metrics should you collect to evaluate success

# Does your media match the message?

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## **“Snail” mail**

- Pros – “official”, less likely to have changed addresses, expensive
- Cons – slow, disconnected response

## **Email**

- Pros – fast, digital links to action, sharable, easy reply, basically free
- Cons – addresses change, may/may not be checked regularly, not confidential/secure

# Does your media match the message?

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## **Text**

- Pros – fast, digital links to action, sharable, easy reply, preferred by some
- Cons – easy to miss, limited characters, specialized technology

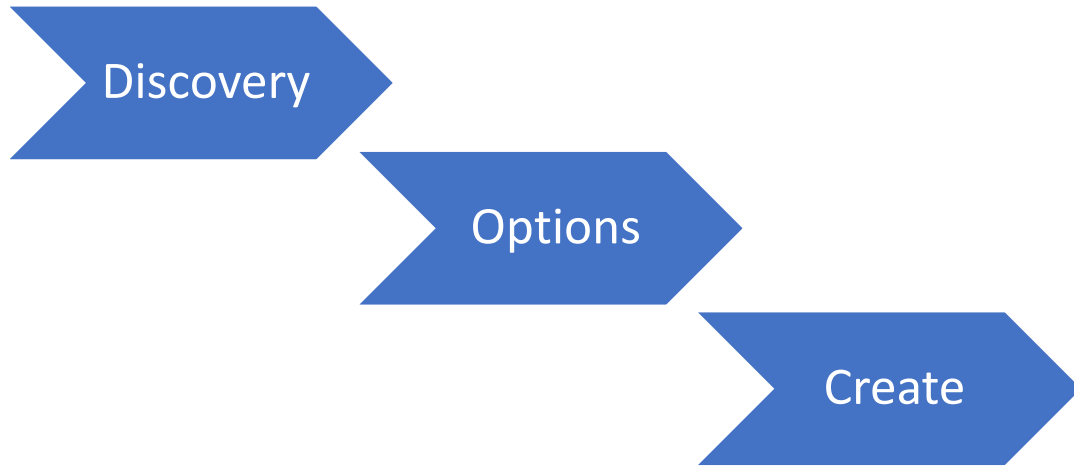
## **Kiosk**

- Pros – point of need information (happening with this shift), timely
- Cons – not interactive, often public spaces, bad timing for follow-up

# What's your "ask"? And are you making it easy?



# Phase 3: Create your communication templates



Dear {Volunteer First Name},

We are so excited to have you join our team. Volunteers are a very important part of our organization, and we couldn't achieve our mission without you. The link below will walk you through the new volunteer onboarding process which involves the following steps:

- Submit the required health forms. You can upload these in the volunteer portal or mail them to us.
- Complete a background check (this is a legal requirement – we're sure you understand).
- Attend volunteer orientation. This one-hour orientation can be done in person on-site or online. This will introduce you to our organization and provide basic guidelines.
- Sign the required volunteer agreement which outlines our policies and requirements.
- Attend training with your volunteer supervisor to prepare you for your role. This training is done 1:1 on-site. At this time you will receive your ID badge and parking permit.

This onboarding process generally takes about a month. We will be reaching out periodically via email with directions for each step. If you have questions or need special accommodation, please reach out to me at [ssmith@hopesprings.org](mailto:ssmith@hopesprings.org).

To start onboarding [click here](#).

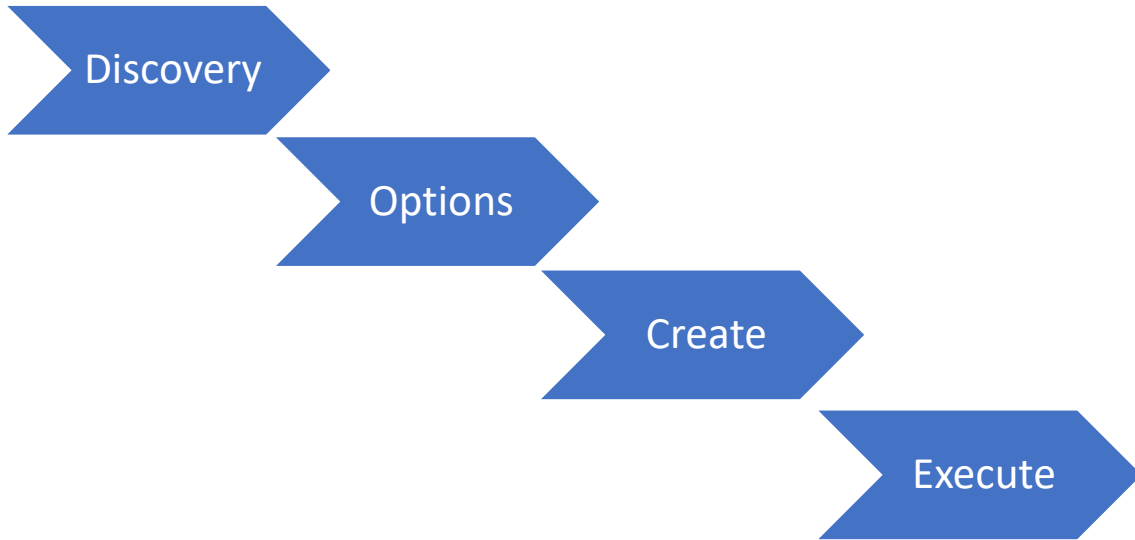
We look forward to meeting you and we know you are eager to get started. It's people like you who make the world a better place!

Thank you,

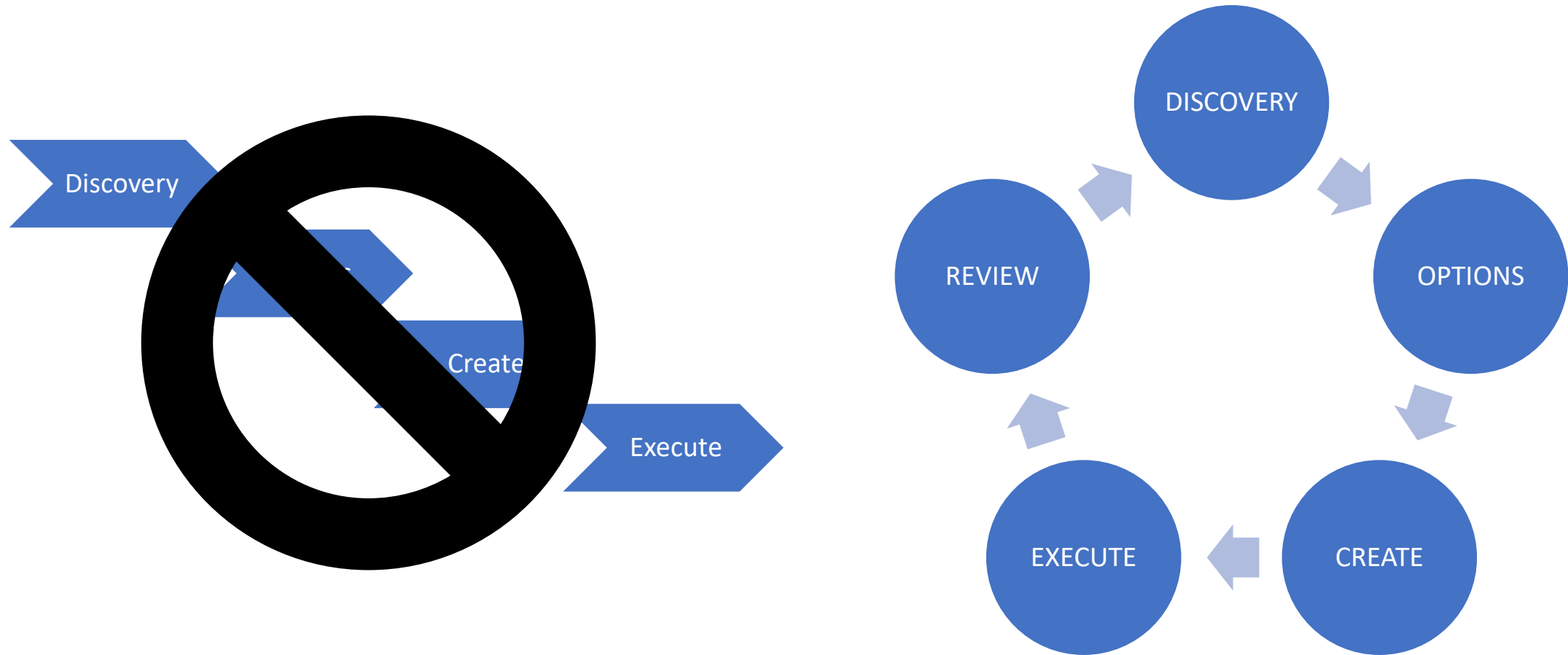
Sue Smith  
Volunteer Coordinator  
Hope Springs Eternal

# Phase 4: Make it happen!

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# This isn't linear – it's a never ending process





# Wrap up

- 1 View the onboarding process through the eyes of an applicant
- 2 Conducting an analysis of your onboarding process lets you determine touchpoints
- 3 Create your communications templates (Thank you! Your next step is....)
- 4 Schedule (automatic if possible) communications to applicants at regular intervals.
- 5 Collect metrics to evaluate process & update regularly

# Questions?



# Resources

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- Link to process map template/sample:  
<https://www.vsysone.com/pages/voices>
- Article on email: <https://brandguide.asu.edu/execution-guidelines/email/content>
- Email communications to different generations:  
<https://www.forbes.com/sites/forbescommunicationscouncil/2019/06/07/tips-on-marketing-to-the-generations-through-email/?sh=5263827357a8>

Thank you!

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