4 ways to **reimagine** technology onboarding | By: Joelle Senter

Have you ever purchased a gadget that you were excited about, only to leave it sitting in the box unused? A few months ago, I sprung for a universal remote with some pretty high-tech features that I couldn't wait to try out.

But when it came time to set up my new remote, I completely lost interest. Why? I blame the dictionary-sized instructions manual.

Intimidated by the sheer size of the thing and the daunting setup process ahead, I gave up and settled on controlling my TV the old-fashioned way.

I've seen similar scenarios play out on a much larger scale when brokerages purchase a new technology and then struggle to onboard staff and agents — and maintain high usage over time.

As excited as brokers might be about new technologies, it's easy to overwhelm agents and staff during the roll out. There's often a steep learning curve, but in the end, getting through that "manual" is worth it because the right technology can boost productivity and business volumes.

During my 10-plus years in the real estate industry, I've worked with technology in many ways.

I've also worked with some innovative brokerages, whose outside-the-box approach to onboarding has made them leaders in real estate technology. These brokerages invest heavily in their technology solutions, developing thoughtful training programs that set agents and staff up for success.

Here are some **tricks** I've picked up from the experts:

1. It starts at the top

It's important for agents to understand they're capable of learning the ins and outs of a new technology solution. When you first announce a new system, it will likely be met with trepidation.

Even the best solutions can be hard to get the hang of at first, and when you've been completing a task one way for years, switching to a new process can seem impossible. Show them the light at the end of the tunnel — through your execution team.

At Better Homes and Gardens Rand Realty, technology adoption starts at the top. The leadership team learns how to use all new tools before introducing them to the community — an internal beta program if you will.

Why? Because it shows agents that successfully learning and effectively leveraging the tool is possible. The motivation of, “If they can do it, then I can, too!” goes a long way.

It’s also important to be transparent about the initial process. Point to instances where your leadership team struggled and delved into how they overcame any hiccups.

Their success and eventual love for the technology might just be the inspiration a stubborn agent or staff member needs to give the tech a try. (And if the management team doesn’t find value in the tool, you have an opportunity to throw it before before the wider team invests time and resources.)

2. Do a dress rehearsal before sending agents out into the field

You wouldn’t put a novice pilot on an airplane or try to pull off a show without a full dress rehearsal. So why send an agent out into the field with a new technology without giving it a test run first? It might seem easy to operate in a classroom setting, but it’s possible agents will feel overwhelmed when asked to perform tasks in real life.

Try setting up simulations to get agents accustomed to new technology before they need to use it with clients. Your agents should feel comfortable performing basic tasks before putting them in front of a live audience.

Mimicking real-life situations in a low-pressure environment gives agents time to learn the technology without worrying that they’ll post a listing incorrectly or send off an accidental email.

At Keller Williams Realty Cary in Cary, North Carolina, agents join test groups, which allow them to get together and do dry runs with their peers.

The best part is the agents get a feel for the tool from multiple perspectives because they take turns acting as the client, the agent, the admin and so on. It’s a great way for agents to master functionality in a low-stakes environment and build confidence before the curtain goes up.

3. Don’t ask them to bite off more than they can chew — make information digestible

It’s important to avoid flooding agents and staff with hundreds of steps all at once. Break it up into small portions and explain steps in a way that makes sense to your agents, and your success rate with jump dramatically.

For example, at Berkshire Hathaway HomeServices Alliance in St. Louis, Missouri, agents are given “I want to …” cheat sheets that explain how to perform specific functions in an easy-to-follow, step-by-step format.

These individual fliers give agents the information they’re looking for and nothing else, which cuts down on frustration and doesn’t overwhelm agents with instructions they don’t want or need.

Agents are much more likely to refer to easily digestible fliers than dig through a massive manual of instructions to solve a simple problem.

Additionally, trainers at Alliance present information in a way that is relatable to its 400 agents. When explaining how to perform a task, trainers tie steps back to how agents could have achieved the outcome before the technology was implemented, which demonstrates how much more efficient and simple a new process can be.

A primary example of this would be to compare the action of sending an email to the process of mailing a letter or faxing a document. It’s tough to argue the efficiency gains. This technique might not work for all agents, but showing the processes side by side helps make the argument to switch that much clearer

4. Sprinkle in support videos

Once your agents are using new technology on their own and in the wild, they’re bound to have questions. Identifying pain points and areas, where your agents might benefit from a quick refresher course, is important — and addressing these issues quickly to ensure ongoing usage is a must.

Indianapolis-based F.C. Tucker produced a series of short tutorial videos that address questions and concerns that pop up on how to use tools such as Zillow and dotloop.

These videos usually last about three minutes, cover one specific pain point and provide a complete step-by-step visual walk-through.

F.C. Tucker sends videos out by email, encourages office managers to show clips during meetings and stores all videos on YouTube for future reference.

Tutorials are quick and easy to produce with the help of a screen-capture video recording tool. And the benefits are huge.

In most cases, agents don't have to call a helpline or schedule time for another training course. Instead, they can visit YouTube or search their inbox to solve the issue on their own and at their leisure.

When it comes to technology, it's easy to give up and go back to what's comfortable. That's why it's important to build an onboarding process that's manageable, logical for your agents and staff, and sustainable over time.

The next time you take on a new technology, consider implementing some of these tried-and-true methods. They might be the key to a successful onboarding process, which results in widespread love and adoption of your new solution, unlike my abandoned and mostly forgotten universal remote.

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