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WEDNESDAY, OCT 15

Transforming
Onboarding

Leaders Share Their Solutions



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AGENDA

Introductions

The Challenges

The Tech and Tools

The Human Connection

Conclusion and Q&A

**Onboarding in PerformanceHQ
SNEAK PEAK**

WANTED

SENIOR
DIRECTOR
~~~  
PRODUCT  
MANAGEMENT  
~~~  
TRAINING &
POLICIES

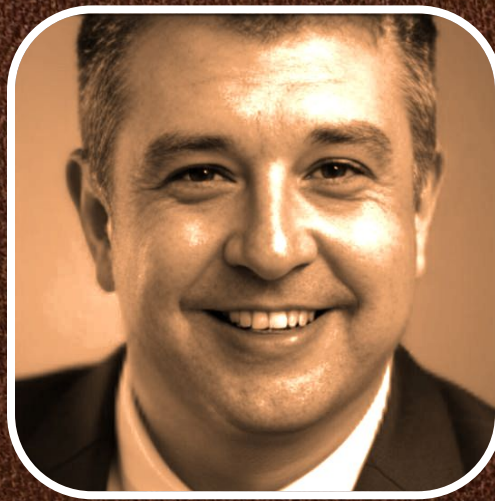


SARGON PALMER



KA'REN SARVIS

VP of Associate Development
Columbia Residential



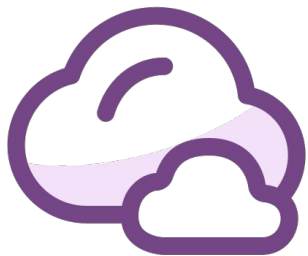
MICHAEL JOHNSON

Director of Learning & Development
AOG Living Management



MARY SHEETS

VP of Talent & People
Dayrise Residential



What are the biggest challenges you've faced with employee onboarding?





Consistency

- Accountability from managers
- Collaboration with hiring manager
- Proper Documentation for I9
- Communication
- Time management
- Information overload
- Who does what? Manager vs training
- Need them onsite now
- Sink or swim
- Too long
- No follow up
- Attendance
- Personalized experiences
- Responsiveness
- Noncompliance
- Manager involvement
- Follow through
- Undersdading the importance
- Manager trust
- Retaining information
- Prioritizing training over onsite needs
- Checklist
- Completion of training
- Bad onboarding process
- Time to complete courses
- HR hiding in their office

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~~ The ~~ Challenges

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~~ The ~~ Tech & Tools

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~~ The ~~ Human Connection

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Conclusion

~~ Q&A ~~

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Employee Onboarding in PerformanceHQ



“The Gains”

- **Standardized, Scalable Processes:** Implement clear, repeatable, templated plans for every key employee journey, ensuring consistency across the entire organization.
- **Significant Time Savings:** Reduce administrative time for admins and managers by automating task assignment, tracking, and reminders.
- **Accelerated Productivity:** Achieve faster time-to-full-productivity for new hires by providing a structured, step-by-step guide of essential milestones.
- **Improved Employee Retention:** Boost engagement and loyalty by demonstrating investment in employees' growth and giving them transparency into their career development.
- **Data-Driven Decisions:** Gain real-time visibility into process adoption, completion rates, and bottlenecks to continuously improve development programs.



Plan Details & Tasks

- Eliminates Ambiguity & Anxiety
- Fosters Self-Paced Learning and Ownership
- Provides Context and Motivation
- Reinforces Accountability

The screenshot displays the Grace Hill onboarding interface. On the left is a sidebar with navigation options: Dashboard (selected), Courses, Policies, Tasks, Achievements, Awards, Apps, Communications, and Settings. The main content area is titled 'Dashboard / Pathway Title'. It features a user profile for 'Hi, [Employee Name]' with a job title and location, followed by a welcome message and a progress bar showing 'Due: 8/10/2025'. Below the profile are sections for Resources (with a 'Link Resource' button), Awards (showing 'Level 2 Leasing Agent' with a star icon), Contacts (listing Adam Jones, Manager and Amanda Smith, Training Director), and Tags (Value A, Value B, Value C). The right side of the dashboard lists tasks with completion status and due dates. A 'Welcome to Your Community' section includes a task to 'Set up your devices' (completed) and a list of tasks for 'Role Readiness & Core Policies' (2 hrs 20 mins total). A purple badge in the bottom right corner indicates 'Onboarding 25%'.

Task	Due Date	Status
Set up your devices	10/10/2025	Complete
Shadow a Senior Leasing Agent on two showings	10/10/2025	In Progress
Introduce yourself to the property manager and maintenance team	10/11/2025	In Progress
Closing with Confidence: Advanced Leasing Conversations	10/12/2025	In Progress
Legal Language: Reading and Explaining Lease Terms	10/13/2025	In Progress
Record a video walkthrough of your favorite unit and narrate it as if presenting to a prospect	10/14/2025	In Progress



Template Library

- Accelerated Deployment
- Ensured Standardization and Quality
- Facilitates Customization and Flexibility
- Promotes Adoption

The screenshot displays the Grace Hill Admin Experience interface. A sidebar on the left contains navigation links: Dashboard, Administration, Plans, Pathways, Learning Plans, Performance, Reporting, Courses, Policies, Mystery Shop, Survey, Reviews, Files, Achievements, Apps, Communications, Settings, Resource Center, and Support. The main content area is titled 'Pathways' and shows a list of active plans. A 'Create New Plan' modal is open, displaying a grid of template cards. Each card includes a title, duration, description, and 'Preview' and 'Create Plan' buttons. The cards are categorized by 'New', 'Popular', and 'Your Plan'. The background interface also shows a 'Pending Approvals (5)' button and a 'Create New Pathway' button. On the right, there is a 'PROGRESS' section with a bar chart showing completion percentages for various tasks.

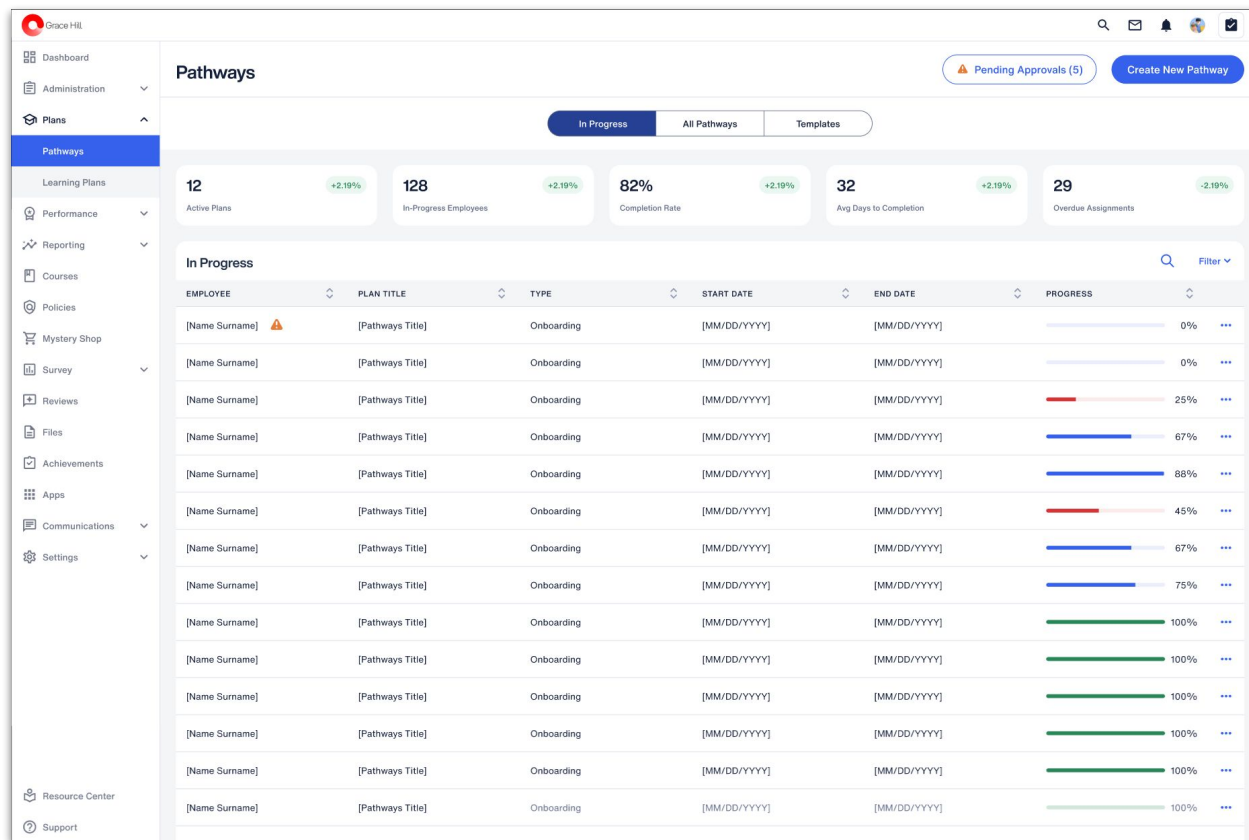
Pathways Title	Onboarding	[MM/DD/YYYY]	[MM/DD/YYYY]
[Name Surname]	Onboarding	[Delete]	[MM/DD/YYYY]
[Name Surname]	Onboarding	[Delete]	[MM/DD/YYYY]

Manager / Mentor Experience



Progress Visibility

- Proactive Intervention & Risk Management
- Performance and Program Health at a Glance
- Accountability and Focus on Timelines
- Rapid Identification of Bottlenecks



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