

Training new Greenhouse users

Your Greenhouse implementation team wants to make sure that you have the support you need to fully train your team.

After partnering with thousands of customers through Greenhouse implementations, we've found the most successful trainings are:

- Conducted live
- In the actual Greenhouse account that the user will be using (or one with the same permissions)
- Led by experts at that company

While the most successful trainings are led by expert users at that company, we are able to support with the planning and execution. If you are interested in Greenhouse support, connect with your implementation contacts (additional costs may apply depending on the scope of the training).



Timing

Begin accounting for user groups during Phase 1 of your implementation.

Step 1

Determine which user groups need training

For a complete company rollout, you want to make sure that you have accounted for every user group at your organization:

Group	Training content
Basic users	Submitting referrals Applying to internal jobs Sharing jobs on social media
Interviewers	Basic user training Conducting interviews Submitting feedback
Job admins (recruiters, coordinators, hiring managers)	Basic user and interviewer training Company-specific workflows (creating jobs, requesting approval, advancing candidates) Consider separate trainings for each role at your company. Depending on the size of your organization, you may want to break them into even more sessions for each type of user.
Site admins (super users, system admins)	Everything!



Timing

Start planning for training during Phase 2 of your implementation.

Step 2

Customize agendas and content for training

You'll want to cover the relevant portions of the platform with each user group. Start every session with an overview of what Greenhouse is and the value it will bring to your team. This is a great time to leverage your internal learning and development/training teams.

Group	Training content	When
Basic users	Email announcement Tip: Consider a fun incentive, like a \$5 gift card for anyone who makes a referral in the first week	Day or week of Greenhouse launch
Interviewers	30-minute, in-person training Sample interviewer agenda Tip: Incorporate this training into your new hire onboarding strategy	Week prior to Greenhouse launch
Job admins (recruiters, coordinators, hiring managers)	45 to 60-minute, in-person training Sample comprehensive agenda Tip: Adjust for each type of user you will be training	Week prior to Greenhouse launch (or potentially further out, depending on volume of trainings)
Site admins (super users, system admins)	This is typically the implementation team who have ideally been learning throughout the setup. If you have a new super user, make a copy of this self-guided tracker New admin training tracker	Ongoing, throughout implementation



Timing

Communication strategies should be finalized by Phase 3 of your implementation (this includes having all trainings scheduled prior to going live).

Company-wide announcements can happen the day or week of launch.

Timing

Trainings should be developed by Phase 3 or you implementation.

Conducting the trainings should remain ongoing.

Step 3

Prepare your communication strategy

Get your team excited about the Greenhouse rollout and training. Plan a company-wide announcement:

- Let everyone know you are rolling out Greenhouse with these [email templates](#)
- Have a senior leader make an announcement at a company-wide meeting
- Get creative! Put up Greenhouse flyers around the office
- Schedule trainings and communicate expectations to make sure your team knows when they will be trained and your expectations for attendance/participation

Step 4

Conduct the trainings and plan for ongoing support

Be sure to record and document all trainings. The one-time, whole-team trainings are essential when rolling out Greenhouse, but you also need a plan for continuing to educate your team.

Three essential steps for continuing Greenhouse education:

- 1 Make sure Greenhouse training is embedded in your onboarding
- 2 Conduct quarterly new interviewer trainings for current employees who are interviewing for the first time or need a refresher
- 3 Store company-specific Greenhouse resources in your internal learning management platform or company wiki



Maintaining buy-in

Once you've launched Greenhouse, you'll want to keep your team engaged and bought in to your hiring process. [Here are some tips and templates](#) to help you and your hiring managers do just that.

Stories from the field

Here are a few case studies of how other companies have successfully deployed Greenhouse:

- Company-wide buy-in and recruiter-hiring manager alignment: How Echo successfully deployed Greenhouse [View blog](#)
- Prepare for launch: How D2L, Sailthru and Red Ventures rolled out Greenhouse to their teams [View blog](#)
- How IDEO uses Greenhouse [View video](#)

Additional materials

PowerPoint templates

Live trainings tend to be more effective, but these training decks can be a helpful addition to those resources.

- [Basic user template](#)
- [Interviewer template](#)
- [Job admin/hiring manager template](#)

Introduction slides

[These slides](#) can be a good jumping off point for every training to introduce Greenhouse to your users.

greenhouse

Greenhouse is *the* hiring software company.
We help businesses be great at hiring through
our powerful hiring approach, complete suite of
software and services, and large partner ecosystem –
so businesses can hire for what's next.

Have questions? Need help? Contact us at
support.greenhouse.io