Building a **More Productive Onboarding** Experience at BenchSci

What Does The End-User *Think*?

We proposed the the functionalities of our solution to employees at BenchSci through 1:1 calls and wrote down their opinion of the platform.

"We used a platform called Guru, however, it doesn't synthesize knowledge from sources and a summarization of notes could help lead to a more productive on-boarding".

Chirag Dave, Senior Project Manager @ BenchSci

"Right now, onboarding onto new accounts in my team is super clunky and time-consuming. If I could onboard onto an account without relying on another member to get me up to speed, it would be much better."

Shahar Amir, Strategic Engagement @ BenchSci

"I worked with account teams and we usually conduct trainings, product demonstrations & 1:1 sessions with scientists to understand their challenges, I would say there is a disconnect in the process. The team clearly understands our workflow and this is something that would be very useful if implemented

Wei-Lin Ou, Scientific Liaison @ BenchSci

"This is a great idea, and I could see a lot of people using this product. Having features like frequently asked questions could be really helpful and convenient".

Ahmed Dawod, Senior Machine Learning Engineer

👉 **Click HERE to view more validation**

Efficiency Within Onboarding

EXECUTIVE SUMMARY

Problem

An ineffective status quo
BenchSci's current onboarding process is reliant on senior staff for information transfer, hampering individualism, while feedback processes are cumbersome. All of this results in a tedious process, which delays the time for an employee to start adding value within a team and decreases employee satisfaction within the company.

Solution

Leverage LLMs to decrease the onboarding time
BenchSidekick prioritizes efficiency within onboarding. Our AI-driven solution seamlessly integrates with BenchSci's Google Drive, offering a streamlined avenue to extract essential insights from large amounts of information and data, along with the guidance to easily do so through relevant prompt generation.

Impact

Reduce onboarding time by 50%
BenchSidekick transforms onboarding at BenchSci's "go to market" division, halving the 12 hour process to just 6 hours while customizing learning to diverse styles, leading to a 38% rise in job satisfaction. This approach goes beyond time efficiency, fostering enriched understanding, engagement, and seamless integration into the company culture.

Currently, onboarding onto accounts is overwhelming and a lengthy 12 hour process.

1

Initial remote meeting will take place with senior employees who have previously managed the accounts. These conversations rely on memory and may lack completeness or full accuracy.

Each account is allotted 1 hour of time in the discussion. On average, each **team member in customer success deals with 3 accounts.**

The **total time required** for these initial conversations with senior employees for all relevant accounts is **3 hours.**

2

Reading through account's Google Drive independently. There are dozens of documents packed with information regarding previous meetings, account assets and much more. Must gather key insights, next steps and formulate questions.

2 hours / account = **6 hours**

3

Consolidating calls with senior employees. New recruits/onboarders have calls to ask questions and develop a plan for their call with the new accounts.

30 mins / account = **1.5 hours**

4

Lead call with new account with all of the information/knowledge gathered. This will enable both the BenchSci employee and account to transition and continue with strategy. This marks the end of the accounts onboarding process.

30 mins / account = **1.5 hours**

A crowded Google Drive complicates information access for new hires on customer success teams.

Customer success team onboarding involves numerous accounts, each with their own storied context.
Onboarding new hires onto growth and customer success teams involves dealing with numerous accounts, each with a wealth of crucial information. Currently, this process is facing challenges to the reliance on a Google Drive repository, where important job expectation, company culture, procedure manuals, and similar are stored, resulting in overload.

&

Information gaps are filled during Zoom meeting of rapid-fire memory-based recollection of all the accounts' info.
To compensate for the information gaps, the team resorts to verbal onboarding in Zoom calls, relying on team members' memory. This approach can be inconsistent, leading to variations in the quality and completeness of the shared information.

Crippling Chaos
Disregarded onboarding breeds overwhelm, leaving a staggering 81% of employees drowning in confusion[1], resulting in wasted time and squandered talent[2].

Productivity Plunges
Neglected onboarding forces workers to navigate a maze of scattered information, an alarming 72% fear asking questions, stifling innovation[2].

We listened to the voices of BenchSci employees.

*"Right now, onboarding onto new accounts in my team is **super clunky and time-consuming**. If I could onboard onto an account without relying on another member to get me up to speed, it would be much better."*

- **Shahar Amir**

Ineffective onboarding stifles contributions, curbs innovation, and dampens new hires' confidence in sharing ideas.

Forbes

Companies **underestimate the significance of onboarding**, often seeing it **as a mere formality**. **It's anything but.**

One study conducted by OnePoll reveals 81% of employees experience feelings of being overwhelmed during the onboarding process. In today's contemporary work environment, employees are expected to engage with numerous platforms and applications, resulting in a significant volume of information being generated and stored.

Gallup

Only **12% of employees find their company's onboarding process effective.**

The high percentage if employees contemplating leaving if their professional fulfillment is not met underscores the critical role of a well-structured onboarding in fostering long-term engagement and retention. The challenge of scattered information across platforms resonates with nearly half of the respondents, pointing to a need for streamlined information management to enhance productivity.

There's been previous attempts at tackling this issue.

Guru is a knowledge management platform designed to help businesses and teams organize, access, and share critical information effectively. It aims to streamline knowledge transfer, ensure up-to-date information, and enhance collaboration among team members.

*"We used a platform called __Guru__, however, **it doesn't synthesize knowledge** from sources and a summarization of notes could help lead to a more productive on-boarding".*

Chirag Dave, Senior Project Manager @ BenchSci

Although, this current approach hasn't proven to be effective within BenchSci's mannerisms.

Key holes within Guru's implementation includes an increase within the complexity of onboarding and not fulfilling all aspects of the onboarding process.

Additionally, a third-party platform having access to BenchSci's sensitive documents can oppose potential issues and concerns.

Read more about case studies here

There is an opportunity between AI & summarization.

50% ↑

In **employee retention** among new hires and a remarkable 62% improvement in productivity within the same group for companies that implements a formal onboarding process. A more seamless process prevents the loss of information transferred from another person.

&

72%

Are concerned about asking too many questions when first starting their role. New hires will be hesitant to speak up or offer new perspectives especially in three-person pods with two colleagues who're much senior than you, leading to a lengthy, uncomfortable and isolated onboarding process.

Introducing BenchSidekick

A cohesive solution which will redefine the current means of the BenchSci's onboarding process, offering employees the seamless experience they've come to expect. This modernized approach ensures that employees no longer embark on their onboarding journey alone. Instead, they are provided with a structured onboarding journey with self-sufficiency.

Google Drive Connection

An AI-powered framework that enables seamless interaction with the entire Google Drive. Unlike traditional isolated document interactions, users gain the ability to engage comprehensively with their collection of documents, to get questions answered in real-time.

Generating Insights

This feature offers a dynamic solution for users to derive valuable summaries and insights from their Google Drive, as well as specific documents of their choosing. With relevant prompt-generations, the employee can reduce the time needed to read through a corpus of documents and easily get answers to the right questions.

# Onboarding made easy with guided autonomy.

Tutorial-like set-up.
Introducing another onboarding tool doesn't make sense if it requires time to onboard onto that as well. That's why BenchSidekick's UX is designed like a tutorial, consistently guiding employees through the process.

Prompt Suggesting and real-time interaction.
BenchSidekick immediately analyzes the Google Drive to customize prompt and question suggestions to help kickstart the self-learning process.

Optimized for onboarding.
BenchSidekick is catered to the onboarding experience for customer success teams, with the option to switch to another team's setup.
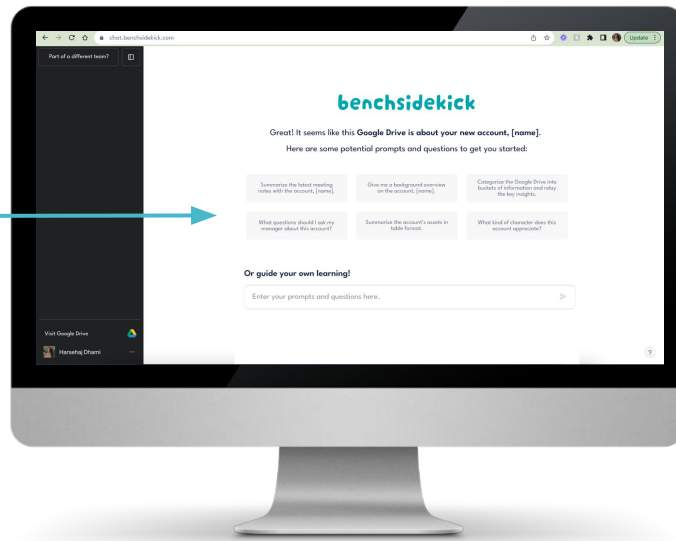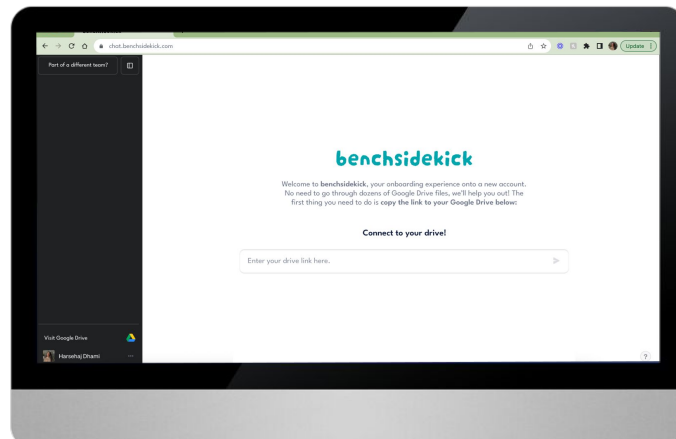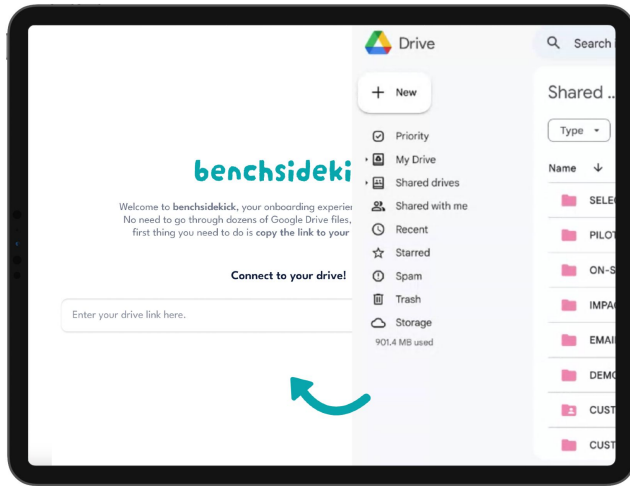
See it live in action.

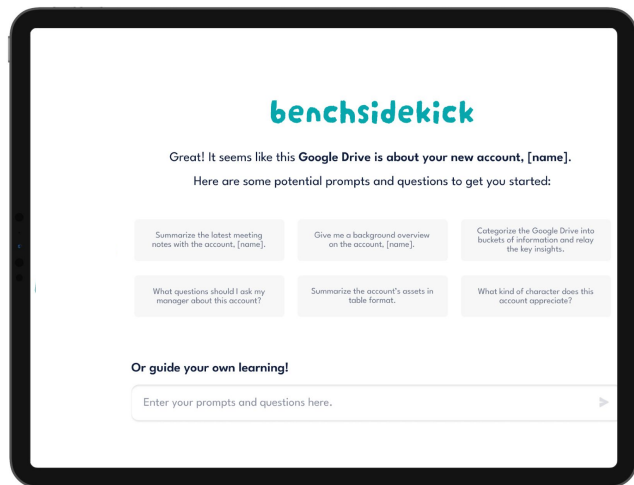Click here to see how to integrate our solution in BenchSci

Seamlessly connects to the Google Drive.

Employees at BenchSci no longer have to manually read every single document to understand the fundamentals of the account handed to them. Our system **syncs with the Google Drive that BenchSci utilizes to extract relevant data and synthesize it into key insight**s, enabling new team members to quickly grasp the intricacies of their assigned accounts. All of this accelerates the learning curve, ensuring that each employee can contribute effectively from day one. Plus, The connection to BenchSci's Google Drive isn't static; it's dynamic and real-time. As BenchSci's **Google Drive is continually updated, our solution adapts in real time,** ensuring that the users are always equipped with the latest information.
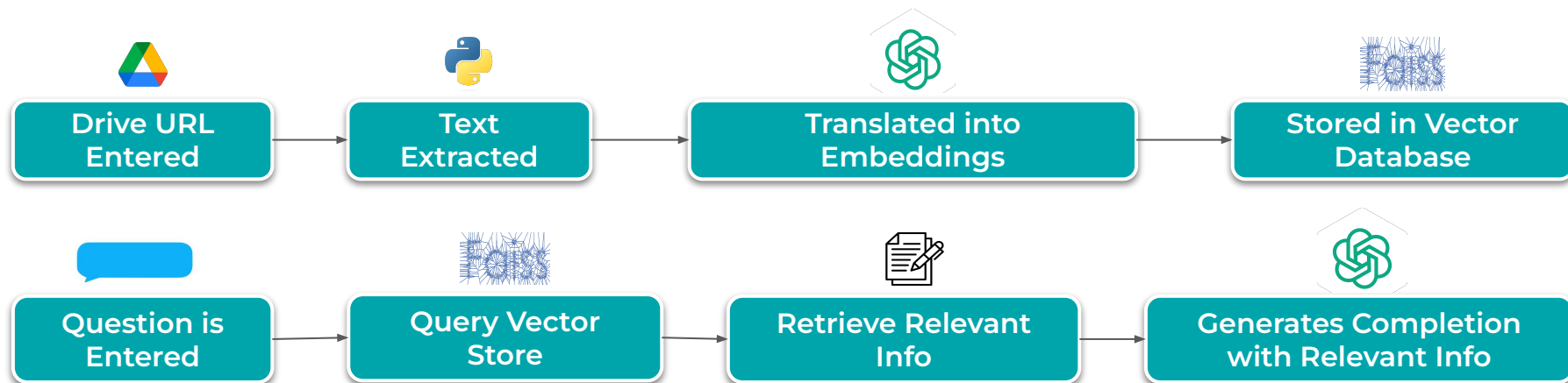
Feature #1

Generate insights with one click.

benchsidekick

Great! It seems like this **Google Drive is about your new account, [name]**.

Here are some potential prompts and questions to get you started:

Summarize the latest meeting notes with the account, [name].	Give me a background overview on the account, [name].	Categorize the Google Drive into buckets of information and relay the key insights.
What questions should I ask my manager about this account?	Summarize the account's assets in table format.	What kind of character does this account appreciate?

Or guide your own learning!

Enter your prompts and questions here.

The process of onboarding can typically be unstructured and daunting to start on. So, BenchSidekick helps you **'onboard onto onboarding' through prompting questions to guide understandings** as you can instantly receive starter questions to ask and spark a general understanding of the contents of the selected folder. Employees can also prompt for **a summarization of their documents** to quickly explore the contents of your selected folder by summarizing your areas of interest in a digestible format; get up to speed without going through unnecessary documentation. All of this is done to learn and problem solve at the click of a button without worrying about bothering fellow employees and managers.

Feature #2

The technicalities behind BenchSidekick.

Drive URL Entered → **Text Extracted** → **Translated into Embeddings** → **Stored in Vector Database**

Question is Entered → **Query Vector Store** → **Retrieve Relevant Info** → **Generates Completion with Relevant Info**

Vector Databases

All folder data is first translated into embeddings which represent the contextual meaning of the text. BenchSidekick then leverages the Faiss vector database by Meta to store and later retrieve the high-dimensional encoded vector data through similarity search and analysis.

Large Language Models

We make use of the text-embedding-ada-002 embeddings model to embed document data, and the gpt-3.5-turbo-0613 model to respond to user prompts in natural language. This is a generative pre-trained transformer that follows the transformer architecture and is further fine tuned and optimized for chat.

BenchSidekick is easy & feasible.

Cost-Effectiveness

BenchSidekick has incredibly low startup infrastructure costs and minimal maintenance costs. By leveraging existing AI models and cloud services BenchSidekick is able to offer advanced capabilities at a fraction of the expense required for custom development. The pay-as-you-go cloud infrastructure also minimizes initial costs ensuring budget predictability.

Time-Efficient Implementation

The readily available AI models and APIs expedit BenchSidekick's development process, allowing for swift integration with BenchSci's existing systems. The tool's intuitive interface also ensures rapid user onboarding with a minimal learning curve, enabling new employees to quickly engage with essential materials. We hope this simple tool may then be frequently leveraged throughout an employees time at BenchSci.

*Development for BenchSidekick is projected to remain **under $5,000** and the total cost of operating BenchSidekick is **only $0.0215 per employee**!*

Learn more about the projected costs here

We're balancing large-language-model reliance with data privacy.

Our reliance on external large language models (LLMs) such as text-embedding-ada-002 for document embedding and the gpt-3.5-turbo-0613 for natural language generation introduces certain limitations that warrant consideration. These models are potent tools, but they operate within the assumptions inherent to their training data.

While we harness the power of these models, we remain aware of the ethical implications and data privacy concerns. It's essential to underline that OpenAI, whose LLMs underlie this solution, respects the privacy of your data; data from inputs is not used without your explicit opt-in.

Furthermore, our journey doesn't culminate with this point of reliance on external models. As part of our forward-looking strategy, we are actively engaged in the development and refinement of proprietary models.

Learn more about our data handling and privacy

Understanding BenchSci's Perspective.

Here's what BenchSci Employees had to say about BenchSidekick.

"There should be a more efficient method to integrate someone into a new account. New hires shouldn't solely rely on a call of what people know about their background and transfer that knowledge to employees. This is great, and solves that exact problem."

Shahar Amir, Enterprise Strategic Engagement Manager & Associate Strategic Engagement @ BenchSci

"This is a great idea, and I could see a lot of people using this product. Having features like frequently asked questions could be really helpful and convenient".

Ahmed Dawod
Senior Machine Learning Engineer @ BenchSci

Now, onboarding onto accounts is simple and a personalized 6 hour process.

Step 1 is completely eliminated and Google Drive consolidation time has decreased significantly.

1

Getting familiar with each account via BenchSidekick. Leveraging the tool to derive key insights, answer specific questions about the account, and develop questions to ask senior employee.

1 hour / account = **3 hours**

2

Call with senior employee to consolidate + calibrate insights from account's Google Drive, answer remaining questions and form action plan for introductory call with account.

30 mins / account = **1.5 hours**

3

Lead call with new account with all of the information/knowledge gathered. This will enable both the BenchSci employee and account to transition and continue with strategy. This marks the end of the accounts onboarding process.

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BenchSci's Return on Investment.

Onboarding time will be reduced by 50%.
A new employee in customer success onboards onto 3 account on average, which initially took 12 hours. With Benchsidekick, this is reduced to 6 hours alongside saving 3 hours from the senior employees' side. As a result of Benchsidekick, BenchSci will save an average of 9 hours per accounts onboarding.
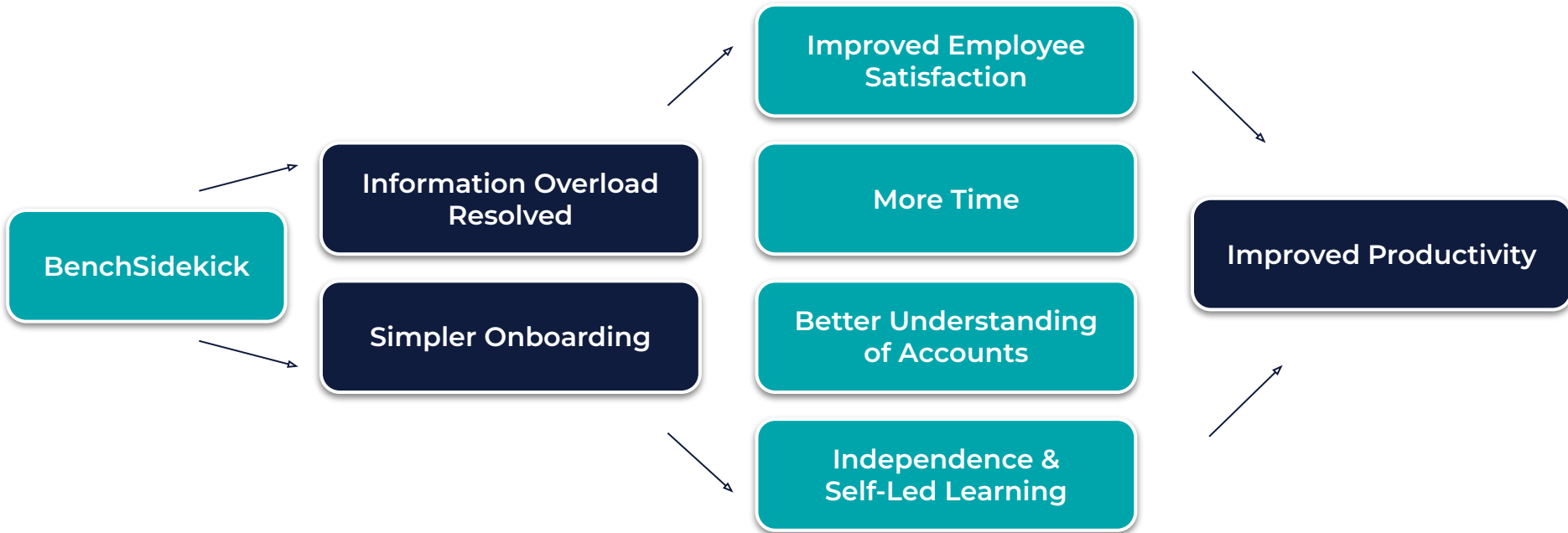
Reduced onboarding costs by 60%+.*
Onboarding currently costs BenchSci $200,000+ annually. With Benchsidekick, this cost is reduced by 60% to $120,900, which saves BenchSci $120,000+.

Employee satisfaction will increase by 38.5%+.
Currently, the average senior employee that organizes onboarding calls with new accounts recruits rates their satisfaction specific to onboarding a 3.25. With Benchsidekick, they would rate their satisfaction at 4.5/5 – the primary reason being "saved time, and less redundancy."

BenchSci's "Go to Market" stream will be 20% more productive.*

BenchSidekick

Information Overload Resolved

Simpler Onboarding

Improved Employee Satisfaction

More Time

Better Understanding of Accounts

Independence & Self-Led Learning

Improved Productivity

Here's what we want to do next.

1

Expanding to Different Teams

The natural progression in mind is to expand BenchSidekick's reach across various teams within the organization, to bring value to all sectors of BenchSci. Each team has its own unique set of account dynamics, strategies, challenges, and information, and all of those should be considered for each individual team with a personalized experience.

2

Sourcing the Insights

The heart of BenchSidekick lies in the extraction of insights from BenchSci's wealth of data. This extended feature enriches the onboarding experience by providing direct access to the source material that underpins the generated insights. So, as new recruits explore the generated insights, they'll be able to seamlessly navigate to the corresponding documents.

3

Synced Highlighting

As employees navigate through account-related documents and resources within BenchSci's Google Drive, they will be able to highlight any information that doesn't make 100% sense, pinging the senior employees of the account – allowing for easy insight into how to facilitate the consolidation call to remove confusions and reinforce key fundamentals.

We Wanted to Quickly Say

Thank YOU!

Harsehaj Dhami

Priyal Taneja

Vinaya Sharma

Minh Anh Đồng Nguyễn

Adam Cheairs

"The past two weeks have allowed for us to be exposed to new learnings and experiences and we're so eternally grateful for BenchSci for providing us with this opportunity. Your commitment to innovation is truly inspiring, and we are honoured to be a part of it. The process of developing a new solution has given us tremendous insights on the strategic processes behind innovation within startups for specific & broad target markets, and these learnings and skills will forever stick with us. This sprint has challenged our time management and reinforced that we are capable of creating an impact at this age; we hold so much gratitude for it all."