



Kanso Native Housing Summit

Kanso Training, Self-Guided Teaching & Support Tools

Onboarding new employees to utilize internal systems

July 31st, 2024, at 10:15 am

Main Room

 Slides will be shared at kansosummit.com post-summit.



What we will cover in this session:

Documenting Internal Processes

Onboarding Best Practice

Kanso Support Portal

WalkMe Self-Help Tool

Accessing Support Resources



Kanso Team



Doug Chapiewsky - CEO

Fearless leader of Kanso Software with a passion for helping organizations adopt new technologies to better serve their communities.



Sean DeCrescenzo - Data Ops Manager

Leader of the DataOps team, handling the front-lines of data adjustments, client conversions, delivery of new sites, and all things data related.



Amy Vermette - Account Manager

New to the team this year, Amy quickly taken to training, empowering, and assisting our partners to thrive in their use of Kanso systems.



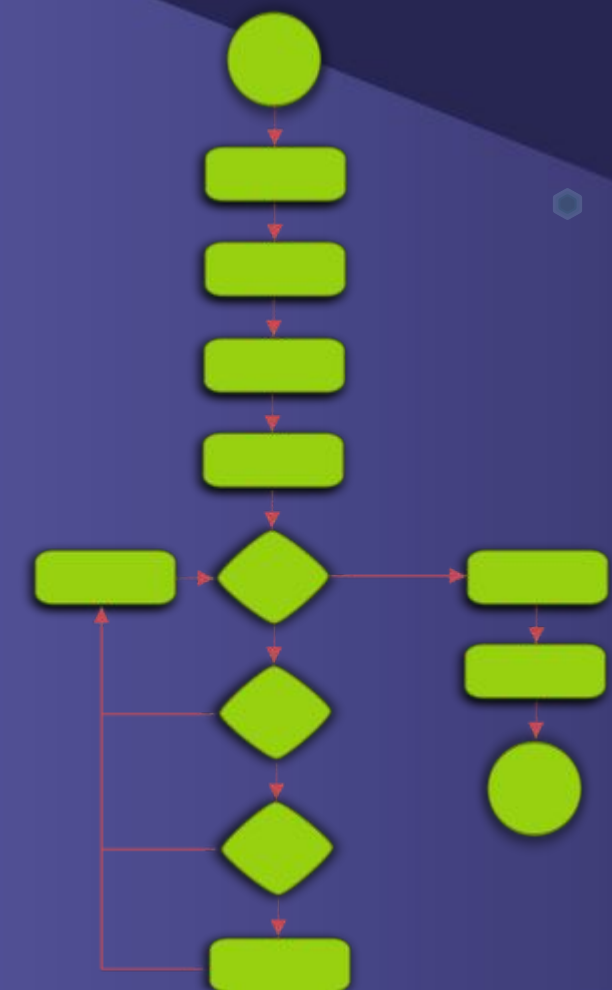
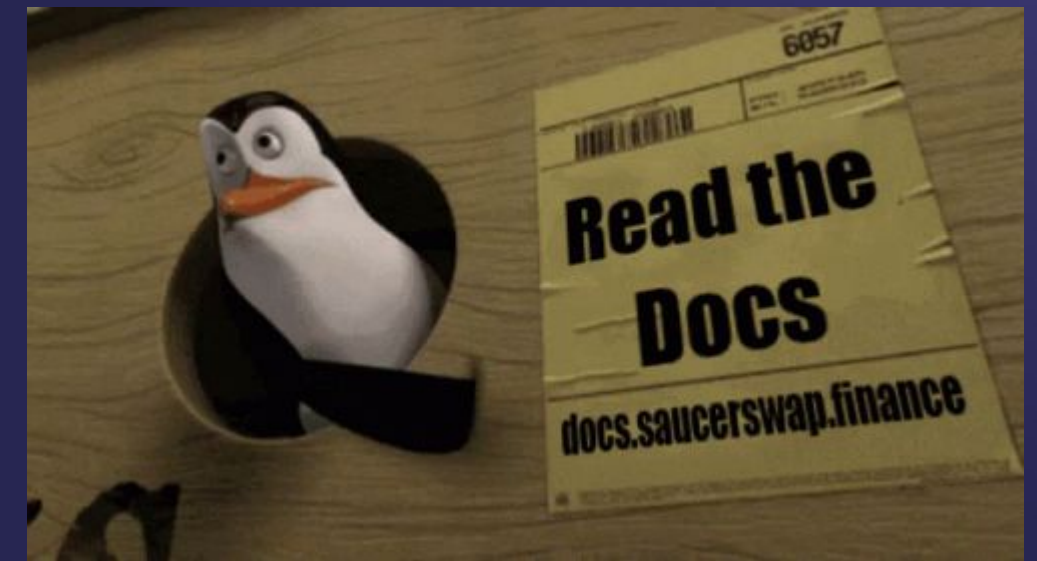
Jeff Olsson - SR Lead Developer

Jeff has utilized his senior developer experience in many market spaces, coming to Kanso in 2023 to implement higher quality and more modern architecture standards within the Kanso applications.

Introduction to Documenting Internal Team Processes

Why Documenting Internal Team Processes is Crucial

- Consistency and Standardization
 - Ensures everyone follows the same procedures
 - Reduces errors and miscommunications
- Knowledge Retention
 - Captures essential knowledge for new and existing team members
 - Preserves institutional memory
- Efficiency and Productivity
 - Streamlines workflows and saves time
 - Helps in identifying and eliminating redundant tasks



Benefits of Documenting Internal Team Processes

Training and Onboarding

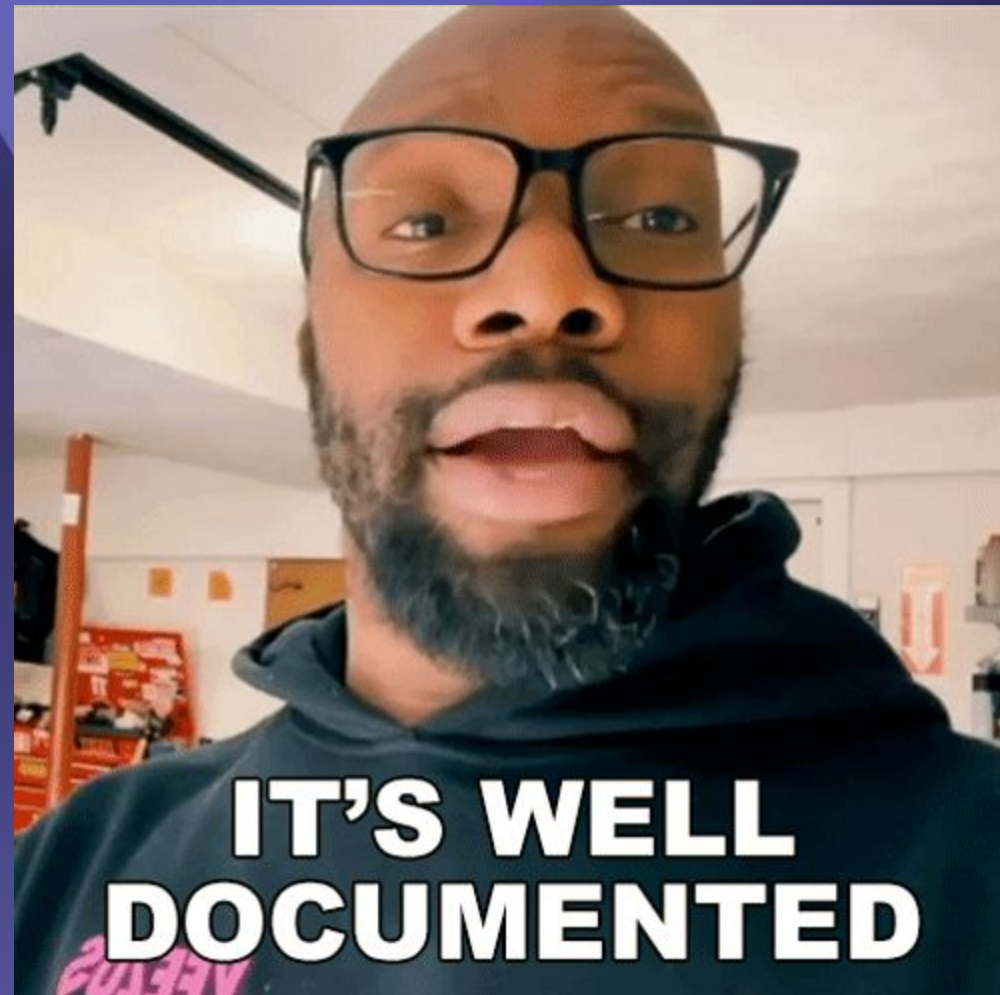
- Simplifies training for new hires
- Provides clear guidelines and expectations

Quality Control

- Ensures high standards are maintained
- Facilitates easier audits and reviews

Scalability and Growth

- Supports business expansion by maintaining process integrity
- Enables smooth transitions during growth phases



Effective Onboarding in Native Housing Management

- Importance of a Structured Onboarding Process
 - Sets the foundation for employee success
 - Helps navigate complex policies and compliance requirements
- Tailored Approach
 - Customized onboarding plans to fit diverse program requirements.
 - Ensures alignment with specific policies and regulations

Key Components of a Successful Onboarding Program

Comprehensive Orientation

- Overview of the organization, mission, and values
- Introduction to key team members and departments

Policy and Compliance Training

- Detailed sessions on specific policies and compliance standards
- Use of real-life scenarios to illustrate complex regulations

Role-Specific Training

- In-depth training on job responsibilities and expectations
- Hands-on training with housing management and financial systems

How does Kanso Help?

WalkMe and other Self Guided Learning tools

WalkMe

- Built in tool that assists in onboarding new employees with role-based learning.
- Can walk a user through most actions/functions of Kanso.

Up-to-Date User Help Guides

- Detailed articles on how to navigate and operate all features within Kanso.
- Many articles include helpful tips, FAQs or hints as we get to know our customers use cases better.

Easy to Access Support Assistance

- In-depth training on job responsibilities and expectations
- Training sites are offered via a monthly subscription that allow employees to “mess-around” with the site in a safe way that doesn't effect live data.

WalkMe

Role-Based Training:

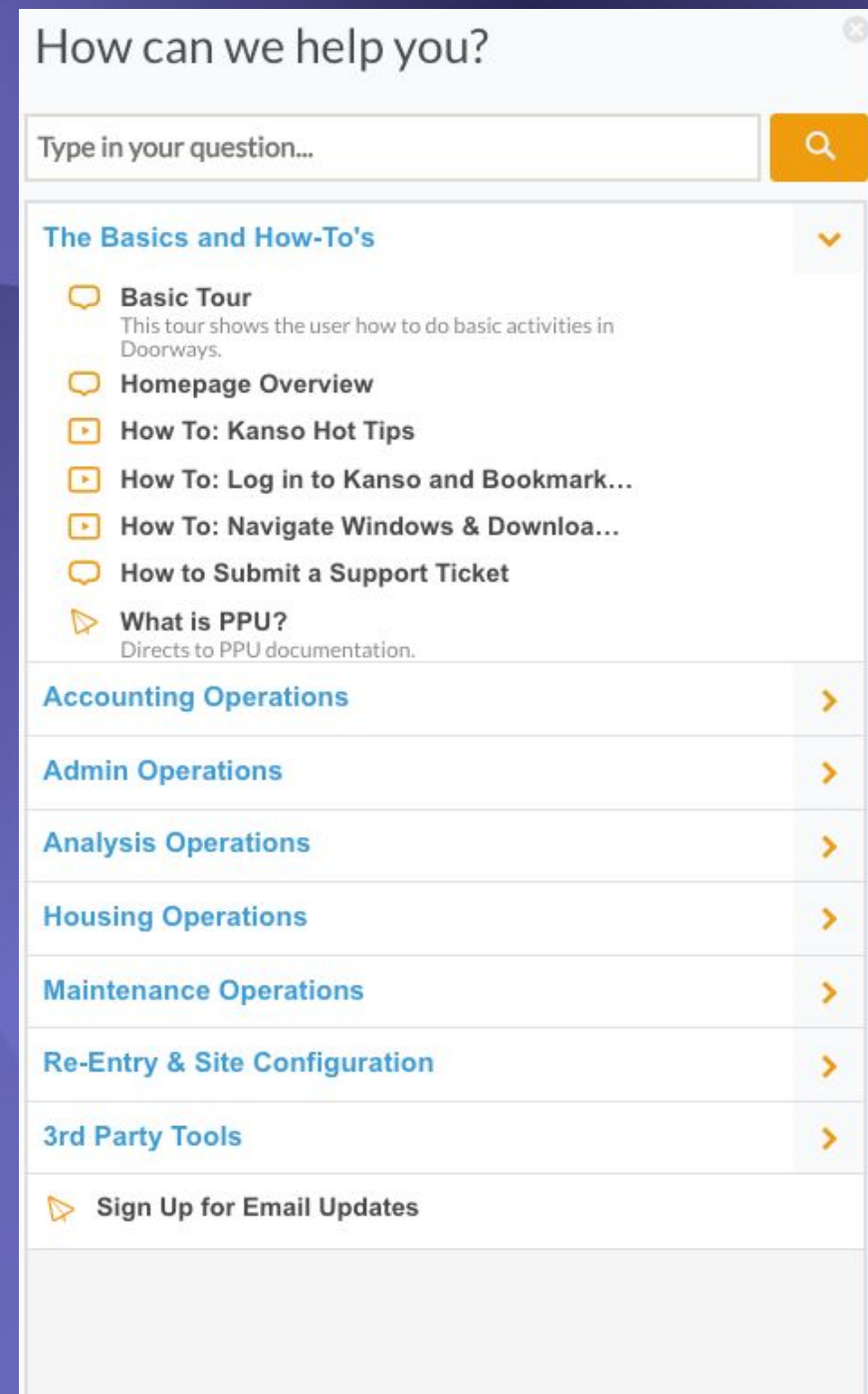
- Every role in a housing organization is different, utilizing different modules of Kanso and different compliance standards.
- We continuously grow and improve upon our WalkMe role based learning system to assist in learning the application as an organization, or simply for individual new hires.

Walk-throughs:

- Get a step-by-step instructional, in real-time, on how to complete the function or action you are attempting to complete in Kanso. Every button click is tracked by the learning system, and has branching logic to ensure it leads you down the right path.

Information & Hints:

- Various places within the application have an info bubble or question mark. These indicate an opportunity to learn more.
- Sometimes a field is unfamiliar to a user, or uses HUD jargon that isn't well known. We like to implement hints to ensure we can best describe the data that needs to be entered, or how the feature should be used.



How to access Client Success Resources

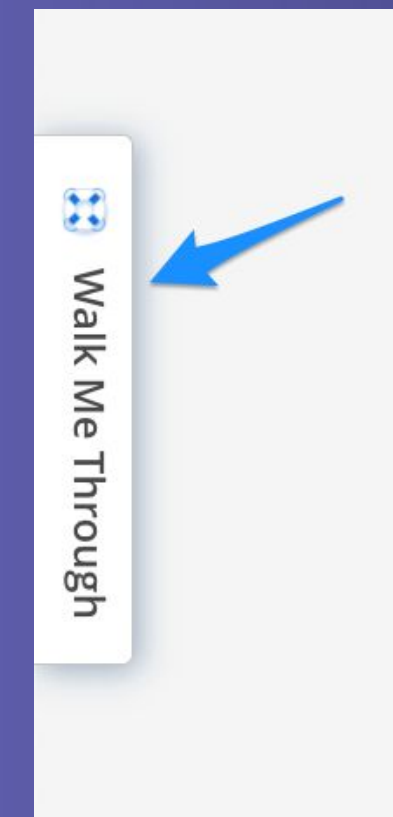
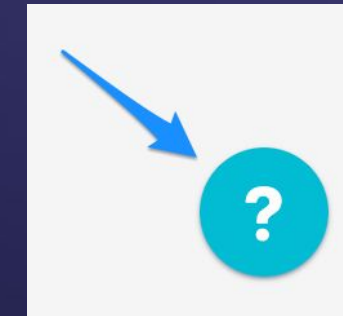
Our world class customer success team is ready to assist!

How to get yer access

- Documentation
 - Can be accessed using WalkMe menu OR
 - support.kansoportal.com
- Contact
 - 303-308-1000
 - Available on all pages of Kanso, bottom right corner.
 - support@kansoftware.com
- WalkMe
 - Available on all pages of Kanso, bottom left.

How to get access to help at summit

- Time Slots available for dedicated time in Support Room
- Support Room drop-by
- Any staff member OR use QR code on name tag/badges




Support (303)308-1000 x1 ×

Description *

Summary *

Attachment
File size should not exceed 5 MB

 Drop files to attach or [browse](#)

Your contact e-mail *

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Summit Agenda - July 31st

- Main Room
 - 1 : 0 0 p m Emerging Issues H U D Compliance & Technology Opportunities
 - 2 : 4 5 p m Use Portals to Connect to your Community
 - 4 : 0 0 p m Closing & Thank You
- Main Room
 - 1 1 : 4 5 p m Break for Lunch
 - 1 : 0 0 p m Kanso Success Tools
 - 2 : 1 5 p m Keep your Kanso Site current & Safe
 - 3 : 3 0 p m Homeownership in your community : Kanso Loan Tracking & Home Conveyance