

This document is considered an appendix to the Participation Process PPP, however it is able to be updated independently of the PPP. Should a discrepancy occur between this guide and the PPP, for the avoidance of doubt, the PPP rules.

## 1.0 Preliminaries

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### 1.2 Terminology

- Newcomer = N = person exploring getting involved
- Prospective = prospective participant= PP = someone who has completed the “I want to get involved” form, and its prerequisites. Its a sort of trial membership for them.
- Participant= member = P = someone who has completed all the onboarding steps during their trial membership, and has signed the Participant’s Pledge
- Onboarding Support Person = OSP = person who supports newcomers and PPs in their joining transition
- Participant Coordinator = PC = the person who receives email to the projects info mailbox, and coordinates the onboarding support system, as well as having some general participant administration tasks.

### 1.3 Objectives

1. To support newcomers’ transition into the project, from an early stage, in a graduated manner, in order to foster a successful and aligned integration.
2. To employ caring and consistent treatment of newcomers and prospective participants, and to have a single point of contact with them so that things don’t have to be repeated or get lost.
3. We’d like to strike a balance between allowing newcomers to take responsibility for their experience, and sharing too much and overwhelming them. Ideally, we would like them to tell us when they need support as well as for us to share that we are here for them whenever they require it.

## 2.0 Checklist

### Stage 1

- Knows you are their single contact person
- Their first name is correct in the contact log, and they are over 18
- Has a user account, and understands how the schedule works
- Has read the Practice Guidelines
- Has attended a practice event
- Have offered them help finding stuff when ready
- Knows that i will follow up in 4 weeks
- 4 week follow up is done
- The contact log is up to date with each interaction

### Stage 2

- They have attend 4 or more practice events
- Have offered them a zoom call
- Have had a zoom call to outline the onboarding process, and ask how they are finding things
- Have explained how important alignment is, and thats why the PP process is slow
- Have gone through the VB and PPPs with them
- Their user account contact details are correctly populated
- They understand the value of practice
- They are working on the reading
- They have attended all 5 IPS events
- Are keen to proceed to PP, and shown where the 'I want to get involved' form is
- They have completed the "I want to get involved" form
- Showed them where the pod directory is
- They have chosen a pod
- Webmaster changed their permissions to prospective, and subscribed to email lists.
- Email sent to PP notifying website permission change
- The contact log is up to date

### Stage 3

- Gave them the Guide for Newcomers.
- They attended their fist pod meeting
- Encouraged practice attendance for priority modules.
- They are engaged with the required reading
- They seem committed and understand the commitment they are making
- Their My Availability is filled out
- They have shared their why with me
- 5 pod meetings attended as PP
- 5 practice events attended as PP
- Both required reading books complete
- Has a good enough understanding of the PPPs
- They want to sign the pledge
- I feel that they are ready
- They signed the pledge
- Webmaster has changed their permissions to member
- Email sent notifying website permission change
- Got their feedback on the OSP process.
- Did my own review of my performance
- The contact log is up to date, and closed up.

## **3.0 The guide—An onboarding journey**

### **3.1 Stage One – Dipping toes in the water (N)**

Bear in mind at this early stage they may or may not be interested in pursuing membership. It's too early for that conversation. Newcomers come into this system via two different routes. They may first write to the project info mailbox (PC assigns OSP). Or, they may attend a practice event, which notifies the PC (who assigns an OSP). The latter will already have a user account, and have received the automated "Welcome email". In stage one the OSP introduces themselves to the Newcomer initially via email:

1. Explain that you are their single point of contact, to offer them support as a potential member
2. Explain that it is super important to us, that their time here feels like a good fit for them.
3. If they express disinterest in attending further events or in accepting the offer of support, you can end here, and change the contact log entry status to not interested. Try to find out why.
4. If need be show them how to create a user account, and how to use the schedule to attend events. This is a common sticking point. Some will be expecting to preregistration or email invites.
5. If they haven't already, ask them to read and understand the Practice Guidelines
6. Offer them the option of a short zoom call to answer any questions they may have.
7. As you work through this stage keep the contact log up to date.
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8. Share that they may reach out at any time, and that you will in any event follow up with them again in 4 weeks. Put a reminder in your calendar.

### **3.2 Stage Two – Keen newcomer (N)**

This stage starts when they have completed 4 or more practice events. Its been our experience that newcomers either fall off at 1 or 2 events, or they will continue through with the whole series. Some might come back and pick up the ones they missed in the next series. But generally they survived their tire kicking experience. It's also about the 4<sup>th</sup> event that they start to form bonds with others on the series. They are more committed now, so ready for the next level of info.

1. Send an email, saying that we love that they have been attending practice events.
2. This is a great time to set up a zoom call, or whatever platform the pair of you negotiate. This is just the easiest way to cover all the necessary ground.
3. Points to cover:
  - We wish to support them in their discovery of the project, which can be quite a maze.
  - Help them understand the VB and the Getting Involved page on the website
  - Answer any questions they may have about next steps.
  - How are they finding the IPS sessions so far?
  - What do they already know about the project and AR?
  - Are they having any trouble navigating the website?
  - Do they use and understand the importance of the feedback system?
  - Give them the option of continuing to attend practices until such time as they are ready.
4. Offer a tour of the participants area.
5. As you work through this stage keep the contact log up to date.
6. Ensures their user account has the person's correct full name, city, country, and timezone correctly populated.
7. If they have completed the 5 IPS sessions, and are interested in a "trial membership":
  - make sure they know what the PP stage looks like
  - show them where the pod directory is, to get them thinking about which pod is of interest
  - make sure they understand the value of regular practice and if need be, provide a list of other platforms to practice on
  - give them the reading list.
  - show them where the "I want to get involved form is", and check they completed it.
  - get the webmaster to change their user account to prospective (important for pod schedule access). The webmaster should also temporarily subscribe them to the fullcircle email list
  - help them choose a pod and liaise with the pod to get them to a pod meeting

### 3.3 Stage Three – Trial membership (PP)

If the two prior stages have been completed well, from their perspective they are most of the way there. Filling out the ‘I want to get involved form’ is a big milestone, and many have said they were all in by that point. That's why the bulk of the OSP work is in stage 1 and 2. So here we can start to dial down the OSP's involvement as they lean on their pod for most of their support going forward. But... they may still have a significant distance to walk to achieve an embodied alignment. They might think they are in, and not yet understand the actuality of the mission and contexts. We have found it takes about 8 weeks of being in it to absorb the reality of what the project is, and some people will become misaligned during this period. So your role is to walk beside them as they make this journey. Below is a list of things to talk them through, at a pace they seem able to integrate.

1. Give them the ‘Guide for Newcomers’ document.
2. Encourage attendance of Communicator, AR Fundamentals and Peacemaker modules. Practice is king. These aren't just nice wellbeing experiences, it takes repetition.
3. The two required reading books are super important to understanding our why. Some people will come with some version of AR training, some won't. Some will come with some understanding of the nervous system, some won't. It's your job to help them fill in the gaps.
4. Check they understand their PP stage road map.: 5 pod meetings, 5 more practice events. It's a simple formulae: 5, 5, 5.
5. Help them navigate their way into a good enough understanding of the PPPs
6. Make sure they understand that the trial membership is a commitment, it involves being contactable and engaged in pod life (it's what makes things happen), send apologies when unable to attend (and why), read minutes (how pods communicate between each other), know how colored cards work
7. Get them to fill out My Availability form. Show them how it works.
8. You can also treat this period as a time to get to know them a bit, what are their values and the experiences that inform them? What are they hoping to learn, achieve, contribute?
9. As you work through this stage keep the contact log up to date.
10. At the point of deciding whether to join, if they are not ready they may choose to extend their trial for a couple of weeks, or to exit their trial membership. If so update the contact log, and flag the status as not interested. Try to find out why.
11. Pledge signing is best initiated by the PP. When they have completed the PP tasks, and you feel good about their alignment, get them to put it on the agenda.
12. Once signed, ask the webmaster to change their user permissions from prospective to member. The webmaster should also check their email subscriptions are set correctly.
13. Send them an email explaining that their web permissions have changed, and they now have full read write access to the participants area.
14. Ask them how they found the process. What did we do well and what could have been improved? Record learnings.
15. Wrap up the contact log.

## 5.0 Appendices – Email templates

There are emails that you will tend to send more often. These are some suggestions, or in other words a place to start from to build your own templates in your own style.

### 5.1 New user account welcome email (automated)

Your user account gives you access to the Introductory Practice Sessions and other public practice offerings.

You might be familiar with various ways of joining zoom calls, but the way we do it, is via the website schedule. Plus or minus 5 minutes of the start time, click view, then 'Zoom link'. There is no email invite, and no preregistration required. If you operate a calendar on your devices there is a iCalendar ICS subscribe link (orange arrows) on the schedule to make remembering events easier.

We would like to take this opportunity to appreciate you for your interest in this work. The way we see it, is that humanity is plonk in the middle of a major growth curve when it comes to relating and communicating. This is why we are here.

We love to have conversations with you, so if you have questions or feedback, you are welcome to contact us via our email address.

If you are keen to get more involved, we ask that you spend some time familiarizing yourself with the onboarding process outlined here:

<https://theconnectionproject.nz/?view=get-involved>

We look forward to practising with you.

The TCP Team.

### 5.2 Very first email to newcomer

Thanks for getting in touch or coming to your first TCP event. This email is to let you know that i am here to answer any questions that you might have, and to support whatever other needs you might have in discovering what we are about.

My name is [XYZ] and i have been a member for [XYX] months. So i know, what it is to encounter this unusual project for the first time. Yes, it can really really feel like a labyrinth.

If the website feels overwhelming, i can really recommend the Quick start guide: <https://theconnectionproject.nz/?view=quick-start-guide>

I just want to say, that however you want to approach this is absolutely fine. You can come to as many events as you want, and absorb it quietly, or you can go on a deep dive and we can discuss whatever you want, however best works for you. Email, phone, zoom whatever its all good.

We are about practice, thats the short version. We get better at relating, by relating.

There is one trap to know about when attending events. You might be used to preregistering or receiving email invites. However we join our zoom events using only the link on the schedule.

Be sure to arrive +/- 5 mins, as after that the link expires. Therefore make sure your user account is all setup in advance. Its essential that you have read and agree with the practice guidelines before attending: <https://theconnectionproject.nz/?view=practice-guidelines>

If you need help with your user account or anything else just holler.

Best wishes,

### 5.3 Further stage one email

I love that you are still with us, and continue to tap into the practice work. I am particularly interested in hearing about what you are learning, what feels juicy and what might feel prickly about it. The full range of human experience in a nutshell!

I also find it lovely to be in a position of walking with you on this journey. I want to again offer any kind of assistance, whether thats a zoom call or something else. I know that there's a lot to take in, and that we each have our own way to process such things.

In any case, here are a few need-to-knows:

1. To understand this project is to understand the value of regular practice. We have adopted a nervous system informed version of AR, we love pair work as well as bringing more structures to our practice work. The two books we would love you to read help explain why this is so.

2. Our Polyvagal World, by Stephen and Seth Porges, explains why its so important to understand our nervous system, which is effectively in charge of how we show up in relationship. There are quirks to being a social mammal which are not obvious, and we can live our whole lives without this critical awareness. Many people upon reading it go, oh that explains everything.

3. Authentic Relating, by Ryel Kestano describes what structured practice involves and explains the principles and practices which we play with in the IPS. AR is a way to apply the understanding in Porges book. Its a way to deliberately and consciously shape our capacity, in order to show up as a more grounded, empathic, and empowered human being. Its conversation as a meditation out loud. Its conversation as a tool to heal. Its conversation as a tool to change the world.

4. If you really want to get into this work, then exploring joining might be what is next. We have a "I want to get involved" form that is the last button in the newcomer section of the getting involved page, labelled "Apply to join" The button becomes active when you are logged in, and completing this short form sets in motion a process where you can try on being a member for 6 weeks or so, before committing to join. We call this stage Prospective Participant (PP). This means that you get to check out some pod meetings, have access to more practice, and decide whether the project is for you or not. Should you subsequently decide to join proper, it is equally easy to unjoin! Prospective participants get read access to the entire participants area. You are also temporarily subscribed to the members email list, so as to keep in touch with other members, and to exchange questions and ideas.

5 Remember that you can attend any of our public practice offerings in any order, and repeat them as many times as you want. It is all practice. Practice is king. We believe that it is practice that is the key that unlocks a true social revolution. AI, and the coming wave of robotics is one thing, but our future more likely hinges on the human capacity to relate.

Thanks for being part of the journey, fellow intrepid pioneer. Don't hesitate to reach out any time.

## 5.4 Post 'I want to get involved' form notification (automated,)

tba

## 5.5 Initial stage two email

We notice and love that you have attended a few of our events. This email is on the off chance that you are ready to know more about the project and its offerings. And to let you know that as your support person I am available at any time to assist with your information needs. I would also love to learn how you are finding the events so far, to get to know you a bit, to try to understand your experience, values and aspirations.

In the project we have a saying that Practice is king. This is because for us its not just about a couple of nice wellbeing experiences to be consumed, but through the repetition of the AR games and set of practices we incrementally rewire the way that we show up in relationship. We believe our capacity to communicate and handle emotion in particular only change through clocking seat time practicing AR.

Coming to grips with the project can be quite the maze, so we are told! To help with this I am willing to set up a brief zoom call with you to answer any questions you may have, and just have a chat. This is an efficient way to cover the ground, and the face to face experience is something we like. Hey, its called the Connection project. However do let us know what kind of communication will best serve you.

Its also perfectly OK to attend more events and figure this thing out in your own way and time. Its all good. Our events are free of charge and open to all. Thanks for being here.

## 5.6 Further stage two email

I would love to hear about your experience of the project and how practice is treating you. What lights you up about this work? What are you wrestling with? These are both super juicy questions in our world.

This email is also in case that some orientation of the website and project contexts might be useful to you, see below.

In AR, context is that set of shared principles or agreements, that often goes unstated. AR loves to make the implicit explicit. In this same same way the project has attempted to document it's purpose and processes. This structure creates a degree of both safety and alignment. Its what allows us to work together. We know that at first glance it appears like a LOT of words. That is the price of clarity. We invite you to absorb it slowly and in your own time.

So much potential strife in organizations is structural, in other words because no one bothered to write down what the

thing is about. This tension could have been avoided by being clear why we are here, where we want to go and how we want to get there. This is exactly what the Vision Booklet does. You might be tempted to see it as some flowery promotional material, which it is. But its also the primary keeper of the big picture context. Its our shared reality, and we invite you to read it as such, and to check where your own contexts align or don't align. This is important, because we can only work together when we have an agreed shared reality on certain basic contexts. From that foundation all manner of creatively emergent goodness is possible. This is where you come in!

We are currently offering both the IPS plus one other themed practice series to non members. This hopefully honors those of us who come to understand something primarily by the doing of it. We know the choice of times is at this early stage in the projects life still rather limited. If you have a suggestion for a time that might serve better do let me know. We shape upcoming events based on continual feedback.

Now the context cake, it has a bottom 'crust' of the Vision Booklet, but it has various other layers of filling. These include the onboarding process, the process documents (which we call PPPs), and a pair of books we consider essential reading.

Other important context for practice work is the practice guidelines. And finally each practice event has its own context, the practice theme and breakout instructions. Its all context. As such its handrails that help massage our old generally pretty bad relating habits into a new form. We call this a plaster cast on a broken arm.

So if you are interested in going deeper into your exploration, or possibly getting involved in the project, we think that coming to grips with these contexts is the key. Any way that we can support you in this, don't hesitate to let me know. Thats why i am here.

Questions to ponder:

- What do you already know about the project and AR?
- Are you having any trouble navigating the website?
- Is there a sticking point in the Vision Booklet for you? (Lets talk, its not perfect.)
- Could you use some help translating the language of the VB? (yes its wordy, we'd love to fix that).
- Do you use and understand the importance of the feedback system?
- Would you like a tour of the participants area of the website?
- Would some insight into what membership looks like, practically, help?
- How can i get more practice?

We appreciate you for being here, for being part of this movement of change. Happy relating.

## 5.7 Post pledge signing notification (automated)

Welcome to the project. We have now or will shortly change your participant's area permissions from 'prospective' to 'participant', (which gives you full read write access) and also subscribed you to the fullcircle email list. From this point forward you are responsible for your own email subscriptions (see Communication > Email lists). For FAQs on the lists see <https://theconnectionproject.nz/?view=email-lists-etiquette>

We will get you to subscribe to your pod email list, if you haven't done so already. If you cant make it a pod meeting be sure to send a quick 'apology' to the email list in advance, this lets peoples rest knowing whats up. If you have an empty moment, a quick scan of the last few weeks pod minutes will get you up to speed with active issues. If you want to put something on your pod agenda, that's Governance > [Podname] Pod stuff.

Feel free to play with the website, you shouldn't be able to break too much. Its for us to populate with interesting things. Any bugs you find send to Peter.

You might like to setup your user account profile, with a little about yourself, and what contact details you want to show. That's under user account > profile.

When in doubt see the Guide for Newcomers at: <https://theconnectionproject.nz/?view=guide-for-newcomers>

Anything else, feel free to ask anyone.