

Last Updated:  
Updated By:  
Status:

## **NAME OF PROCEDURE: Onboarding New Employee**

### **Notes:**

### **Recurring Tasks:**

#### **1. Purpose**

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To use when a new employee is hired.

#### **2. Responsibilities**

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Jane Doe - SOP - Hiring New Employee (prerequisite)  
Paige Smith - Admin Duties

#### **3. Procedure**

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1. Send an offer letter: [Jane Doe]

Template:

<https://www.dropbox.com/s/u4o1yrdw5n5mh05/Offer%20Letter%20-%20Template.docx?dl=0>

2. W-9 signed [Admin]

- Send to new hire

3. Background Check [Admin]

- Get address
- Get social security number

4. Schedule meeting at 4 weeks and 8 weeks for review

EVENTUAL  
**MILLIONAIRE**

- Try to set a meeting scheduled for Monday for 30 minutes to review performance
5. Send out an e-mail to everyone in the office so they're prepared to welcome a new employee. [Admin]

Here is an example email:

Hey John!

I want to welcome you to the team!

Everyone, I'm excited to bring John in to help us. He's located in the Philippines so his time zone is about 13 hours different.

Here is the outline of who does what at the moment :)

**Paige Smith: Executive Assistant and Scrum Master**

Paige runs my life - she handles all of the customer service, my schedule, and holds me accountable. She also runs the daily scrum meetings and helps everyone get what they need on the team when they are stuck.

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**John Cruz: Lead Technician**

John is an amazing tech problem solver! We are going to have him work on any wordpress issues, along with getting him up to speed on our infusionsoft. I also want him to work on a system to level up our website (with SEO and potentially a new learning management system in the next year to level up our programs)

Super excited to welcome John to the team!

**ACTIONS TO DO:**

Please add each other via skype (and note their phone numbers!)

And I want Paige to set a meeting with John to get to know them too!

# EVENTUAL MILLIONAIRE

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If anyone has any questions, do not hesitate to ask.

[Name], we will be going over in much more detail your onboarding process but this week will be a little bit slow and steady to start getting you familiar and up to speed!

Warmest,  
- Jane

6. Give Eventual Millionaire T-shirt (if available!)
7. Initial Software/Web set up
  - Create email address
8. Passwords per Role
  - Create login to membership site.
9. Explain Org Chart
10. Create KPIs for new hire

## **4. References & Definitions**

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How to Use Asana: <http://suitcaseentrepreneur.com/time-management-tricks/how-to-use-asana/>

Asana Training Videos: <https://asana.com/guide/videos>

Tips on How to Use Slack: <https://medium.com/@slackhq/11-useful-tips-for-getting-the-most-of-slack-5dfb3d1af77#.7xwkz6awz>

## 5. Checklist

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### New Hire Checklist:

#### Week One:

- Send an offer letter
- W-9 signed - Sent to AI
- Background Check
- Welcome Email sent
- Give EM T-shirt
- Initial Software Web Setup
  - Email address
  - Hubstaff
  - Asana
  - Slack
  - Dropbox
  - Wordpress
- Other Passwords set up
- Show and explain Org Chart
- Create KPIs for new hire
- Team Meeting Info given and set up in calendar recurring

#### Within Month 1:

- Review performance objectives and progress

#### Within Month 2:

- Review performance objectives and progress a group