How to start?

Regardless of which platform you use for your video meetings (Zoom, Google Hangouts, Skype, etc.), these tips are sure to help you:

Let the new team member share his/her screen from the beginning; that way, you can guide them through the process.

Be explicit with your instructions. You should refer to specific areas of your screen: “In the top left-hand corner” or “in the lower right corner.”

Encourage them to ask you any questions they might have and take the time to answer in a clear and explanatory way to ensure the person understands.

Allow the new team member to focus on the company onboarding during the first full week.

Set up company tools:

At Voice123, we follow these steps during the first meeting:

1. Ask the team member to download the security app that you use for his/her phone. (We use **Google authenticator**).
2. Set up his/her company email and send the invitation to the team member’s personal email. Once accepted and operational. use the company email only.
3. Create the team member’s account in the password manager that you use and ask them to download the browser extension. (Click here to know how to do it in **LastPass**).
    - Set up **2-step verification** using the app. (Click here to learn how to do it in Google Authenticator).
4. Create the account or provide access to your documentation platform. (In our case it’s **Atlassian**).
    - Create a personal page for the team member and add the **onboarding checklist** (you’ll find it at the end of this PDF).
5. Create a new user in your chosen video-conferencing platform, email them the invite, and ask them to download the browser extension. (Click here to learn how to do this in **Zoom**).
6. Teach the team member how to schedule a video-meeting in your calendar. (Click here to learn how to do it in Zoom).

7. Create a new account for the team member within your company's instant messenger and add him/her to all the essential channels. (Click here to learn how to create a new user in **Slack**).
8. Create an account for the team member in your grammar check app (Click here to learn how to do it in **Grammarly**).
9. Verify that all the accounts are functioning properly.
10. Go through the checklist together and resolve any issues.
11. Ensure the team member knows how to use all the tools.
12. Add both the new member's birthday and company anniversary to the company's events calendar so these can be celebrated in due course!

Team member's onboarding checklist:

Our checklist reflects what we expect the team member to work on each day of the company onboarding. Make a copy of this checklist and give it to the team member to complete.

Day 1

1. Make sure you have access to all company tools and your profile information is up to date.
2. **Meet-the-team activity:** For big companies we recommend booking meetings in groups and for small companies 1-to-1 meetings with the other team members should be fine.
    - Send a 20-minute calendar invite (during one of their open slots) to meet with them. Invite four team members to each meeting. We recommend using ***zoom.us*** for the meetings.
      Note: 1. You should aim to do this within one business day.
      2. Send an individual meeting invite to our CEO.
    - Have meetings with team members, this could take more than a week. Follow this structure during your meetings:
        - Introduce yourself.
        - Your name.
        - Your role.
        - What will be your KPI?
        - How did you get to the company?
        - Ask the following questions.
        - What is their name?
        - What is their role?
        - What is their mission at the company?
        - Ask them a question that you would like others to ask you. This question has to be the same for everybody.

- Create a blog post in your personal space that contains all the answers.
- Share your blog post with the whole team once you've interviewed all of them.

3. Read how you'll receive your compensation. Familiarize yourself with what applies to you.
4. Request the books you have to read (week 2 through week 8) from People Ops.
5. Follow our social media pages.
    - Facebook.
    - LinkedIn.
    - YouTube.
    - Twitter.
    - Instagram

Day 2

You should read the content for day two annually while employed by the company.

1. Read the company handbook. (**Note:** *You should have a page for the company handbook. It should include your history, strategy, mission, frameworks to show how the company works, etc.*).
2. Send photos to People Ops to update the team page.

Day 3

1. Read the previous year's company retrospectives. (**Note:** *You should also have a public document where you will start adding all your own retrospectives per Q.)*
2. Watch these videos
    - Are you sitting too much?
    - Why sitting is bad for you
    - Founder's mentality and the paths to sustainable growth
    - How great leaders inspire action
    - Steve Jobs Stanford Commencement Speech 2005
    - Humans Need Not Apply
3. Know your team's OKRs and watch this video How Google sets OKRs
    - Schedule a meeting with your team leader so you know your team's OKRs, KPIs, and your own responsibilities.
    - Ensure you know how to view and search the OKRs in your own time.
    - Set an individual OKR. (Click here to learn how to do it in ***Upraise***).
4. Answer this survey about your onboarding.

(***Side note to company leaders:*** *We strongly recommend having a survey. This way you'll always know whether team members feel there's room for improvement.)*

5. Update your personal space with the following information, (Click here to learn how to do it in ***Confluence***).
   - Team.
   - Role.
   - Responsibilities.
   - KPIs.
   - Do the strengths finder test here and add it to your personal space.

Day 4

1. Schedule a meeting for day 5 with the ***People Operations Coordinator*** to resolve any doubts or uncertainties you may have regarding the information you received during your onboarding. During this meeting, also ask the People Operations Coordinator to close your company onboarding.
2. Ask your team leader for your next onboarding tasks.
3. Have a **customer operations day** on the first day of your second week in the company.
   - Coordinate with the team to have this meeting. (***Note:*** *The goal of the customer operations day is to show the new team member how the company interacts with its users via the Customer Success team. It allows the new team member to shadow the team and gain first-hand experience.)*

Day 5

1. Read the company career openings, post them in your social media channels and tag three people who could either fit the role or help us spread the word. Referrals are a powerful tool for companies like ours to hire talent, so please help us out!

2. Read this article about how to map a customer journey.
   - Map our clients' journey (**Note:** *You should aim to do this in less than a week)*
   - Coordinate with the People Ops Coordinator to present your map in the next team meeting.

Week 2 to Week 8

1. Close your company onboarding with the People Ops Coordinator.
2. Read these prescribed books before your 8th week in the company:

- Platform Revolution.
- Delivering Happiness: A Path to Profits, Passion, and Purpose.
- Creativity Inc.
- The Alliance.
- If you are a team leader, Zero to One.
- If you are a team leader, Fire Someone Today and Other Surprising Tactics for Making Your Business a Success.
- If you are a team leader, Drive: The Surprising Truth About What Motivates Us.

Week 4

1. Give feedback to your leader about your communications and your leader's leadership skills.
2. Create a draft of your Tour of Duty.

Week 8

1. Give feedback to your leader about your communications and your leader's leadership skills.
2. Sign your Tour of Duty.

Checklist to complete for team leader

Our checklist reflects what we expect the team leader to work on each day of the team member's company onboarding. Make a copy of this checklist and give it to the team leader for him/her to complete.

Day 1.

1. Welcome the team member to the team and company in the company's public channels. Check how to welcome a new team member.
2. Explain their role and mission in the team to the new team member.
3. Revise and approve a new team member's email signature.

Week 2

1. Explain the role onboarding to the new team member.

Week 4

1. Give feedback on the Tour of Duty draft.
2. Give feedback to the team member.

Week 8

1. Decide if the team member has passed the trial period successfully.
2. If the team member passes the trial period successfully, sign the Tour of Duty.
3. Give feedback to the team member.