



Onboarding {Generic Employee}

Aa Task Title	⌵ Timing	☰ Supporting Info	🔗 Supporting Docs
<u>Untitled</u>			
<u>Duplicate This Task Sheet Database with new hires name share with hiring manager. HP, CEO, COO</u>	pre onboarding	This individual swimlane, position description, role profile	
<u>File All Signed Paperwork in Corporate Repository.</u>	pre onboarding		
<u>Enter Stock Option info to Board Approval Sheet</u>	pre onboarding	Quarterly Stock Option worksheet (in Board Folder)	
<u>Put start-date on corp & hiring manager calendar; inform hiring manager of start-date & onboarding-time and time of virtual office tour (Slack, etc.)</u>	pre onboarding		
<u>Add new employee to TriNet or Remote.com. Ensure employee will receive their first paycheck properly and can sign up for benefits.</u>	pre onboarding	TriNet or Remote.com	
<u>Send Welcome Email to New Hire - include policy. document on office setup reimbursement</u>	pre onboarding	Home Office Allowance	https://www.notion.so/ferm880e034f0ab04935b7e9cd

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<u>(computer, chair, desk, etc).</u>			
<u>System Setup- (see Notion Onboarding Owners).</u>	pre onboarding	Onboarding Owners (Notion Page)	https://www.notion.so/ferm466f56d50f294eb4b185bec
<u>Add New Hire to Company. Calendar events</u>	pre onboarding	Company Calendar	
<u>Fill out Private Employee Info (Notion), plus the related Mgr Info (with comp, offer-taken, etc...).</u>	pre onboarding	Private Employee Info database (Notion)	https://www.notion.so/fermv=f9185d3da6824a5b81c94
<u>Obtain First Day letter from Hiring Manager to New Hire - Describes the specific agenda and task(s) for their first week on the job</u>	pre onboarding	First Day Letter Template	https://www.notion.so/ferm1b769b8bfb3f4e5882bf5a4
<u>Two days before start date send new hire email with Outlook login and overview of first day.</u>	pre onboarding	Fermyon outlook access and overview of first day	https://www.notion.so/fermDate-Send-Email-to-Accessb3e73c1a8c3247dd8e878c5
<u>Schedule Company StandUps and Company Meetings</u>	pre onboarding	Company Calendar	@diane - Do we have an SC Standup?
<u>Send New Hire Checklist (list included).</u>	pre onboarding	Hiring Coordinators sends with First Day email	
<u>Schedule Onboarding & First-Day Meetings (Hiring Manager and Hiring Coordinator).</u>	pre onboarding	Hiring Manager and Coordinator Calendars	
<u>Procure Home Office Setup and Submit Reimbursement</u>	pre onboarding		

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<u>Schedule HP Culture Meeting</u>	Week 1 Day 1		
<u>Request new Employee's photo and bio for website; deliver to webmaster. Send in first day email</u>	Week 1 Day 1		
<u>Set up New Employee "website interview" - optional for hire (for published new hire story on their backstory to joining Fermyon).</u>	Week 1 Day 1	Sara wants to highlight each new employee with a blog post and other highlights — the content of which takes shape through a 1-1 interview with Marketing	
<u>For Managers: Schedule Manager Onboarding Discussion</u>	Week 1 Day 1	Manager Onboarding (Notion)	
<u>Review this Copy of Onboarding Swimlanes with New Hire</u>	Week 1 Day 1	Onboarding Swimlanes DB COPY; First Day Letter	
<u>Self-Onboard into TriNet or Remote.com</u>	Week 1 Day 1	TriNet, Remote.com	
<u>Greet New Hire; Virtual Tour; 1st Onboarding Meeting. Tour the virtual office - explain the different spaces (mostly slack) and how we use them. See Check-list Below</u>	Week 1 Day 1		
<u>Fill out Public Employee Info in Notion</u>	Week 1 Day 1	Public Employee Directory (Notion)	https://www.notion.so/fermv=8e6b5949c6be4024b30
<u>Hiring Manager Start Day Meeting</u>	Week 1 Day 1	First Day Letter; Checklist in page below	

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Get info for Swag/Merch and Send to Employee	Week 1 Day 1		
Review Benefits, Payroll, Expense Reimbursement	Week 1 Day 1		
Send employee invite link to Ramp	Week 1 Day 1		
For Managers: Review Manager Onboarding	Week 1 Day 3	Manager Onboarding (Notion)	https://www.notion.so/fermc40d9076629a4754a8f853
Send link for StrengthsFinder Assessment to Hire & Provide Overview	Week 1 Day 3	FIP009 StrengthsFinder Onboarding	https://www.notion.so/ferm297fc607193e41bfb1b85c4
Employee Complete StrengthsFinder Assessment	Week 1 Day 5		
Complete StrengthsFinder and send to Hiring Mgr, Human Performance	Week 2	Clifton StrengthsFinder report	
Complete all info in Private Employee Info database	Week 2	https://www.notion.so/fermyon/a7a1097ffa684b6a96996deacf0432c7?v=f9185d3da6824a5b81c94daa3bec2c05	
Human Performance Review of Culture Meeting	Week 2	Checklist on this page; @Diane Sampson We need to review this list of items and separate them into HP lead and Hiring Coord responsibilities @Adam Reynolds I will add them to the onboarding doc.	
Schedule 60 and 90 day check-in meetings for human performance, CEO, COO	Week 2	Copy & Paste the content of the Meeting Template (i.e. the questions) into the meeting invite in calendar to provide the employee context for what the meeting is about.	
(If Manager) Schedule Planning "How To" three weeks before quarter-end	Week 2	Strategic Planning Process (FIP011); Strategic Planning Notion Page; My Measures & Projects Notion page	https://www.notion.so/ferm76c4dc62caa24295a944bt

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<u>Employee Book 1 on 1 meetings with team members</u>	Week 2		
<u>Onboarding Feedback Session</u>	Week 2		
<u>Complete StrengthsFinder Session 1 - one 60 minute session</u>	Week 3		
<u>Complete StrengthsFinder Session 2 - one 60 minute session</u>	Week 4		
<u>Complete Stock Option Grant</u>	30 Day	Carta	
<u>Conduct 60 Day Check-in</u>	60 Day	Checklist info on this page below as well as link to Check-In Template to use.	
<u>Conduct 90 Day Check-in</u>	90 Day	Checklist info on this page below as well as link to Check-In Template to use.	
<u>Audit new hire paperwork complete</u>	90 Day		