

Your Easy Onboarding Guide

HOW TO CREATE AN ONBOARDING PROCESS
SO THAT ANY NEW EMPLOYEE OR CONTRACTOR
YOU BRING ON CAN HELP YOU REACH
YOUR GOALS A WHOLE LOT FASTER.

|

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“Onboarding is an art. Each new employee brings with them a potential to achieve and succeed. To lose the energy of a new hire through poor onboarding is an opportunity lost.”

– SARAH WETZEL
DIRECTOR OF HR, ENGAGE:BDR

Hiring a VA, Project Manager or any other key role in your company is a big deal and there are a lot of moving pieces in the onboarding process.

As a company, no matter the size, it's critically important to stay organized and follow the same procedure each time a new employee or contractor is hired. You want to make sure you have all necessary paperwork signed and filed, your new hire has access to all the software, programs and accounts necessary to do their job, and that they have a detailed game plan to successfully carry out their job responsibilities.

I created this Spark Guide so that you have a step-by-step plan to get started in building your team in an organized and systematic way.

And remember, you can start small — even just five hours a month! If you hired someone at \$20/hour that's just \$100 a month!

IMPORTANT DISTINCTION:

The main difference between a contractor and an employee is that a contractor works independently, provides their own equipment (laptop, etc.) and is responsible for paying their own taxes on the income they earn from the services they provide you. You may NOT hire a contractor and expect them to work full-time hours and still treat them as a contractor. You are required by law to withhold taxes from anyone working full-time for you.

NOTE: All states have specific guidelines when it comes to hiring contractors, so please check contractor hiring guidelines before bringing on a contractor to work with you.

Ready to get up to speed on ALL of the important steps necessary in making your onboarding process seamless and systemized?

Let's dive in!



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The Step-by-Step Onboarding Process for Your Virtual Assistant (Contractor)

If you are just starting out and looking at your first hiring opportunity, I want you to start by hiring a Virtual Assistant (VA) to work for just a few hours per week, like I did when I was first getting started. The beauty of first hiring a VA as an independent contractor is you will have the opportunity to start slow, find what tasks are most beneficial for you to delegate and give your VA a “test run” without a huge time or financial commitment.

Looking to hire a Project Manager or other role on a contract basis? You will follow a similar onboarding and project plan process, so take what you’ll learn here and tweak it to fit the role.

PRE-DAY 1 (3-5 DAYS BEFORE YOUR VA’S FIRST DAY)

- ☐ Create a CONFIDENTIAL contractor file in Google Drive for signed HR paperwork. Make sure this folder is only accessible by you and anyone on your team handling HR duties.
- ☐ Have the following documents/forms completed and emailed back to you by your new VA, and filed in the confidential employee Google Drive folder before their first day.
- ☐ Project Agreement (Laying out the terms of your agreement, pay and project expectations -- this could be a simple Google doc or an email between you and your VA.)
- ☐ Non-Disclosure Agreement (NDA)
- ☐ A Gmail and GoogleDrive Agreement (if you’re going to assign your VA a company email address).

PAYING YOUR VA: Make sure to communicate how your VA should submit invoices for their work. We have our contractors email us an invoice and we generally pay them via PayPal or Stripe.

If you pay a contractor \$600 or more for services provided during the year, a Form 1099-MISC needs to be completed, and a copy must be provided to the independent contractor by January 31 of the year following payment. Set a reminder in your calendar now to take care of this.



Your Virtual Assistant's First 30 Days

(Contracted for 5 Hours Per Week)

Following is a sample project plan of what the first 30 days should look like for a VA working just FIVE hours/week. Once you work with your VA for a month, you'll discover where her/his strengths are and how you'd best like to use them going forward, so create an ongoing plan based on how the first 30 days goes.

Week One: Learning About the Business

TASK	NOTES	DATE/HOURS
First day meeting and go over project plan	<p>It's vitally important that you get your new VA off to a good start on their first day. The key to success is an organized plan with bite-sized tasks and excellent communication.</p> <p>Schedule an orientation video conference call to welcome your new VA and go over the project plan and scope of work for the first 30 days. You can then schedule weekly check-in meetings.</p>	30 minutes
Go through training information	This would include any SOPs or other trainings you've put together about your company: mission statement, description of your Ideal Community (IC), how to navigate and use core software, apps, communication tools, etc.	1-1.5 hours (depending on how extensive the packet is)
Reading through your site, blogs, Social Media channels, listening to your podcasts, watching your YouTube and Facebook Live videos, etc.	The idea here is to get your VA acclimated to your content.	1-2 hours

Connect with other contractors or team members	Introduce your VA to your writer, designer, developer, etc.	30 minutes Note: You may skip this step if you're just starting out and don't have an existing team.
Sign in and acclimate to your project management systems	You want them to get a feel for how you work with Asana or Trello, for instance.	1 hour

Week Two: Start Small

Start with one or two smaller projects that you can give immediate feedback on.

TASK	NOTES	DATE/HOURS
Blog posting & management	Start with one blog post that you will need: <ul style="list-style-type: none"> » Edited » 2-3 images selected » Posted on a WordPress backend » Email newsletter set up (and proofed) 	2-3 hours
Posting on FB and Instagram	Come up with posts for the next 4 weeks. Send to manager for approval.	2 hours
Weekly meeting	Come with questions, suggestions, and action plan.	30 minutes

Week Three: Branching Out

Now that your VA knows your business, you can start to incorporate them into the business more by adding another project to the existing list.

TASK	NOTES	DATE/HOURS
Client development	<ul style="list-style-type: none"> » Set up meetings with clients » Follow up with thank you notes » Send out contracts, invoices, etc., as needed 	2 hours
Blog posting & management	Weekly blog: <ul style="list-style-type: none"> » Edited » 2-3 images selected » Posted on a WordPress backend » Email newsletter set up (and proofed) 	2-3 hours
Social media maintenance	Make sure posts are up and comments are tended to.	1 hour
Weekly meeting	Come with questions, suggestions, and action plan.	30 minutes

Week Four: More Responsibility

At this point, you know you can trust your VA to take on more...
and tasks will become quicker/more time efficient

TASK	NOTES	DATE/HOURS
Email marketing	Set up new email campaign to welcome first-time students (including segmenting list).	2-3 hours
Client development	Set up meetings with clients. Send out contracts, invoices, etc., as needed.	1 hour
Blog posting & management	Weekly blog: » Edited » 2-3 images selected » Posted on a WordPress backend » Email newsletter set up (and proofed)	1.5 hours
Social media maintenance	Make sure posts are up and comments are tended to.	30 minutes
Weekly meeting	Come with questions, suggestions, and action plan.	30 minutes

Remember, you may find a rock star VA the first time out who helps you take your business to new heights, but you may also work with someone for a few months and realize it's not a great fit. Whatever your VA journey, trust me, all of this will be worth it as you experience new levels of freedom — and work to scale your business!

The Step-by-Step Onboarding Process for Your Part-Time and Full-Time Employees

If you're ready to bring on a part-time and/or full-time employee, the onboarding process will be more extensive than with a contractor — more paperwork and a 90-day evaluation and review period. But don't worry, I'll help you narrow down the most important hiring documents and give you the step-by-step performance review plan.

Team Porterfield uses the 30, 60, 90 Day Onboarding Process for 3 Specific Reasons:

- 1. To allow both company and new employee a period of testing each other out.** It's important for both you and your new employee to have time to make sure it's a good fit. We also include an "at-will" clause in our employment agreements which means that at any time, the company or employee may terminate employment with no particular reason or cause.
- 2. To ensure the new employee has explicit, measurable and time-bound instructions, and a plan of action to best carry out their responsibilities and meet company expectations.** You want your new employee to have the best chance at showing you what they can do and that starts with them understanding what is expected of them.
- 3. To allow the new employee proper time to acclimate and train.** We love for our new team members to hit the ground running, but it's critical to schedule appropriate chunks of time for training and on-the-job learning so they can build a confident foundation to excel in their role.

As you'll see, the onboarding process I use in my business for full-time employees is pretty detailed, but remember, I've been in business for over a decade and have slowly built a small but mighty team of full-time employees (as well as contractors) over the years. My hope is that you'll take what I've learned (from testing, fine-tuning, and making mistakes) and create your own streamlined onboarding process.

If you have someone on your team that handles your onboarding process, make sure to pass this guide along to them. They can take each item listed below and create an onboarding project plan template in your project software management system so you can use the framework again and again as your team grows.



Take what makes sense for your business and implement your own version of this process.

PRE-DAY 1 (3-5 DAYS BEFORE THE NEW EMPLOYEE'S FIRST DAY)

- ☐ Create a CONFIDENTIAL employee file in Google Drive. All signed HR docs and 30, 60 and 90 performance reviews will be kept here. Make sure this folder is only accessible by you and anyone on your team handling HR duties. See the list of HR documents required for our new employees (full or part-time only) below.

(**NOTE:** We now use [Gusto](#), a cloud-based payroll, benefits, and human resource management software, to send, collect and store all of our confidential employee documentation. Check out [Gusto's](#) pricing and see if this is something you'd like to use now or down the road as your team grows, too.)

- ☐ Have the following documents/forms completed and emailed back to you by your new employee, and file in the confidential employee Google Drive folder before their first day. NOTE: As I mentioned above, our onboarding documents are all sent out and collected — electronically signed — through [Gusto](#).
 - ☐ Offer letter (a verbal agreement does not count)
 - ☐ Non-Solicit/Non-Compete Agreement
 - ☐ Non-Disclosure Agreement (NDA)
 - ☐ Company Email & Google Drive Agreement. (This is a form telling your employees that the company email and Google Drive contents are property of the company at all times.)
 - ☐ Equipment Agreement (if you're providing a laptop, printer, phone, etc.)
 - ☐ Core Values Agreement (This is a form that lists your company core values, with a statement that your employees sign off on agreeing to embrace and practice those values.)
 - ☐ I-9 Form (IRS form required for every employee you hire for employment in the USA)
 - ☐ W-4 Form (IRS employee withholding allowance form)
 - ☐ Copy of Passport or Driver's License
 - ☐ Direct Deposit Form (from your new employee's bank)
 - ☐ Acknowledgment of Receipt of Employee Handbook

- ☐ Report your new employee through the appropriate state website. State and federal laws require all employers to report basic information on new and rehired employees within 20 days of hire, some states require it sooner. [Click here](#) for more information.
- ☐ Set up your new employee's payroll process to ensure timely payment. (We love [Gusto](#) for payroll!)
- ☐ Create a business email account for your new employee (Tip: Set up [Google Suite](#) inside your business to make this process easy and streamlined. Make sure to have the new employee complete the Company Email & Google Drive Agreement.)
- ☐ Login to your new employee's email inbox and update the inbox password by choosing a generic password to use across all new logins you will be creating for your new employee. (The reason the inbox needs to be set up prior to your new employee's first day is because as you create logins for them, you will need access to the inbox to click confirmation links, etc.)
- ☐ Create account logins for any applications and/or software your new employee will need access to upon starting their position. (We generally start with: LastPass, Slack, Asana, Dropbox, Wordpress, [Kajabi](#), [Searchie](#) (backend admin of our courses and membership), [HelpScout](#), and Zoom.)
- ☐ If you will be providing equipment, make sure your new employee has received all they need at least a day or two before their first day. NOTE: I began supplying my full-time employees with laptops in the last couple of years. Prior to that, I expected my employees to use their own equipment. All contractors I work with are required to supply their own equipment (this is standard). Either way, make sure this is clear in all documentation prior to their first day.
- ☐ Schedule a video conference call meeting with your new employee early on their first day (don't forget to include the video call link in their day one welcome email).

FIRST DAY OF EMPLOYMENT

It's vitally important that you get your new employee off to a good start on their first day. The key to success is a well-organized plan and good communication. Following is a Day 1 sample schedule based on our process (below that is a sample 30, 60, 90 Day Onboarding Plan).

SAMPLE FIRST DAY OF EMPLOYMENT ITINERARY*(To use as inspiration for your own itinerary)*

TIME	EVENT	NOTES
8 am	Set up/log in to applications and software team uses on a daily basis	You'll find the list of applications and software in the welcome email you received yesterday.
9 am	Welcome meeting with Visionary or Manager. Go over plan for first day and 30, 60, 90 day onboarding plan (see sample below). All HR paperwork must be signed, sent and filed at this point.	Zoom link
10 am	Watch first two software application training videos (eg. Asana and Slack).	Create a list of any questions and we'll make sure to answer right away!
11 am	Watch the Google Doc and Google Drive training videos. Click here to see how I organize my Google Drive and Dropbox folders.	Create a list of any questions and we'll make sure to answer right away!
Noon	Lunch	Grab a bite, stretch your legs, and get ready for a great second half of your first day.
1 pm	Meet the team (if there are other employees or contractors to meet).	Zoom link
1:30 pm	Go through Modules 1 and 2 of our course XYZ.	Course access link
3:30 pm	Listen to podcast/video episodes or blog posts: xyz, xyz and xyz.	Link up to any specific podcasts, videos or blog posts you'd like them to review to get to know you and your content better.
5 pm: Quittin' Time	Relax and enjoy your evening!	We're so happy to have you on the team!

30-60-90 Day Onboarding Plan

You'll want to have your 30, 60, 90 Day Onboarding Plan document ready for your new employee's first day so they can get the full picture of what is expected of them and ask questions.

Following is a sample of some of the items that might appear in a 30, 60, 90 day plan for a VA (taken from my own Executive Virtual Assistant's plan).

A few important reminders when putting together your new employee's onboarding plan:

- 1. Include a few overall or big-picture measurables or "Wins" at the top of your onboarding plan.** This will help your new employee to understand what they're working toward as they move to accomplish their tasks in the first 90 days of employment.
- 2. Keep your task description short and sweet.** The more detailed "action" for each task should be kept in the "Measurable" column.
- 3. It's very important to explain why a certain task or project is to be completed.** This will help your new employee understand the company's goals, what should be a focus, and how their role fits into the overall picture.
- 4. Include the deadline date in the "Date" column and allow your new employee to figure out how they'll organize and prioritize their daily schedule.** Stay away from micromanaging — you've spent time to find the right person for the job, so let them do what you're paying them to do. :)

30, 60, 90 DAY ONBOARDING PLAN FOR A FULL-TIME EXECUTIVE ASSISTANT (SAMPLE)

- ☐ **Win #1:** Christine has FULLY taken over Amy's calendar.
- ☐ **Win #2:** Christine has implemented a system to ensure Amy's inbox reaches inbox zero daily at least four times a week.
- ☐ **Win #3:** Christine has managed Amy's time and calendar in such a way that we've reached Amy's "Ideal Week" regularly to allow Amy to work in her zone of genius while also enjoying some white space and time with her family.

30 DAYS - (INSERT DATE RANGE)

TASK	MEASURABLE	DATE
Get familiar with Lastpass (see tutorials here) and set up business logins & add to your shared LastPass folder	Done: Yes or No	day/month Date Completed:
Read the book <i>Free to Focus</i> and Watch Full Focus Planner Video Training (Link assigned to you in Asana)	<p>Why: Everyone in the company will be expected to use a Free to Focus physical journal daily to ensure we are working to our optimal potential and efficiency. This book outlines the key principles.</p> <p>Action: Create a “Key Learnings and Takeaways” one-page that explains how you will apply the lessons in this book in your support of Amy.</p> <p>Deliverable Met: YES/NO</p>	day/month Date Completed:
Create a confidential “AP Executive Support” Google Drive Folder and Begin Organizing Subfolders	<p>Why: We are insanely organized at all times and when it comes to specific docs, we want to be able to find them quickly. Creating the “AP Executive Support” folder in your first week will ensure you are creating docs in the right area from the get go.</p> <p>Action: When you meet with me in your daily meetings, be sure to ask where to create this special folder and how to organize it based on all the different tasks in this 30-60-90 plan.</p> <p>Deliverable Met: YES/NO</p>	day/month Date Completed:
Listen to 10 OMME Episodes	<p>Why: The podcast is the backbone of our business. It’s a big lead generator and relationship builder. Everyone in the company should listen to the podcast weekly. The goal here is to get up to speed quickly.</p> <p>Action: Listen to 10 episodes to begin understanding the business, team members, and “current happenings” more.</p> <p>Deliverable Met: YES/NO</p>	day/month Date Completed:

60 DAYS - (INSERT DATE RANGE)

TASK	MEASURABLE	DATE
Plan "Locals" Holiday Dinner	<p>Why: In December we want to celebrate the holidays and the team with a team for all local employees. I'd love to find somewhere special.</p> <p>Action: Find 3-5 options and run by me. Make the reservations once we decide on the location.</p> <p>Deliverable Met: YES/NO</p>	<p>day/month</p> <p>Date Completed:</p>
Book flight details and accommodations for Female Leadership Conference	<p>Why: I will be speaking at this conference and need to secure flights and rooms. Chloe will be going with me.</p> <p>Action: Book flights and hotel for both Chloe and Amy to the conference.</p> <p>Deliverable Met: YES/NO</p>	<p>day/month</p> <p>Date Completed:</p>
Plan 2022 Quarterly Meetings for Leadership Team	<p>Why: Our Leadership team meets for two full days on a quarterly basis. We follow the EOS framework which helps our company to run in a systematized way.</p> <p>Action: Put my presentation outline into a Keynote slide deck (AP branding). Book conference room and order daily lunch and dinner at La Costa Resort. Send out agenda to Leadership team.</p> <p>Deliverable Met: YES/NO</p>	<p>day/month</p> <p>Date Completed:</p>

90 DAYS - (INSERT DATE RANGE)

TASK	MEASURABLE	DATE
Read the book, " Your World Class Assistant ," from Michael Hyatt's team.	<p>Why: Michael Hyatt and team are incredibly strategic in how they work with VAs in their business -- let's learn from them on how to work together in the most strategic and beneficial way.</p> <p>Action: Create a one-pager outlining how you can use the information in this book to become my (Amy's) own world class assistant. Provide specific ways in which you will save Amy time, money, and energy by incorporating the ideas in this reading into your VA workflow + processes. Assign a task for me to review when completed.</p> <p>Deliverable Met: YES/NO</p>	<p>day/month</p> <p>Date Completed:</p>
Create Your Own VA Ideal Week That Includes all Weekly Tasks Performed to Support Amy	<p>Why: After 90 days with the team you should have a good idea what tasks need to be performed weekly to support me in the best way possible.</p> <p>Action: Create and implement your ideal week to ensure all tasks are performed in the most efficient way possible.</p> <p>Deliverable Met: YES/NO</p>	<p>day/month</p> <p>Date Completed:</p>

The 30, 60, 90 Day Performance Review Process

Although you want to be giving feedback on an ongoing basis during the first 90-days of employment, you also want to schedule time to review, reflect, and give quality feedback, which is what the 30, 60 and 90 day performance reviews are for. They also provide an excellent way to record and measure the progress your new employee is making or not making.

You may also optionally conduct a 1-year performance review with your employees — we have done this in the past, but discontinued this process as we shifted our company culture to one of more constant and ongoing feedback.

PLANNING AND SCHEDULING YOUR PERFORMANCE REVIEWS

To ensure that all reviews are planned, scheduled and executed in an organized fashion, you better believe I create a project plan in Asana! Below are a list of specific tasks my team includes:

- ☐ Schedule a one hour “Performance Review Event” in Google Calendar. The title will be “[Name’s] 30-Day Review.” Invite the new employee and the team member who will do the review.
- ☐ Prepare for [Name’s] 30-Day Review. Assign this task to the new employee’s manager 7 days before the review is to take place. Attach the Performance Review PDF to the Asana task for easy access.
- ☐ File [Name’s] 30-Day Review after the performance review is completed. Request a signed copy from the employee, scan it, and file in the employee’s Google Drive personnel folder (or in Gusto, like we do).
- ☐ Repeat the above steps for their 60 and 90-day reviews

CONDUCTING YOUR PERFORMANCE REVIEWS

This review is to be used as a dialogue to help your new employee and their manager better understand the expectations and requirements of the position. It’s also an opportunity to recognize contributions to the company. The review process is interactive, and both the employee and their manager should participate in setting goals. The review

is designed to help strengthen areas that need to improve and to highlight and recognize those areas where the employee excelled.

Following are the 11 performance categories we use in our 30, 60, 90-day performance reviews (feel free to use these or adjust to what makes most sense for your business):

1. **Knowledge of The Job:** Possesses the knowledge and technical competencies required to perform job responsibilities.
2. **Quality of Work:** Produces work at acceptable standards including accuracy, neatness, and completeness.
3. **Quantity of Work:** Regularly produces an appropriate volume of work in a designated period.
4. **Effective Use of Time:** Accomplishes work by required deadlines through effective planning and prioritizing.
5. **Dependability/Accountability:** Willingly takes on, is held accountable for, and performs assignments in a timely manner.
6. **Communication Skills:** Conveys information clearly and logically both verbally and in writing. Communicates in a way that promotes understanding, compassion, mutual respect, productivity, and cooperation.
7. **Interpersonal Relations:** Develops and maintains positive working relationships with others. Is a team-player. Exhibits integrity, adaptability, and consciously communicates with other employees and our audience.
8. **Initiative:** Offers suggestions, anticipates needs, seeks additional tasks as time permits, is a self-starter; and contributes, develops, and/or carries out new ideas or methods.
9. **Attendance and Punctuality:** Reports to work on time, is respectful to coworkers by attending meetings on time, observes time limits for lunches, gives prompt notice of absence due to illness, and adheres to all applicable company policies.
10. **Mission, Vision, Values:** Regularly demonstrates knowledge of and abides by the company mission, vision, and values.
11. **Results:** Understands departmental goals, puts appropriate attention on activities and ideas that drive revenue or reduce costs to support the company's bottom line.