

Employee Onboarding Checklist Manual

Introduction

Welcome to the team! This manual will guide you through your daily checklist, ensuring all tasks are completed efficiently and consistently. Completing these tasks each day will contribute to your bonus, so it's important to follow each step closely.

1. Clocking In and Out

- Clock In: Log into Homebase to track your time. If you don't have a login, please notify the team immediately.

Steps: Go to My Week > Clock In > Select Personal.

- Clock Out: Be sure to clock out at the end of your shift and during your lunch break. This ensures proper payroll tracking.

2. Slack Communication

- Channels:
 - Admin Time Off: Post your clock-in time here.
 - To-Do List: Share your tasks for the day here each morning.
 - Finish Line: At the end of the day, post completed tasks here to track progress.

3. Marketing Engagement

- Daily Engagement:
 - Like and comment on posts across 12 social media accounts.
 - For each post, leave 1 like and 2 comments (one can be an emoji).
- Leads and Follow-ups:
 - Engage with Facebook group posts and respond to inquiries promptly.
 - Send follow-up messages with links to the appropriate services.

4. Responding to Leads via Quo (OpenPhone)

- Check Messages: Log into Quo to check for new leads.

- Respond promptly with personalized messages. Avoid using duplicate messages.
- Always include a link to the appropriate service (e.g., coaching, business inquiries).

5. Completing Transcriptions

- TurboScribe: Transcribe videos from influential figures (e.g., Dan Martel) for content repurposing.
- Export the transcription as a Word Document and send it to the team for further use.

6. Creating Graphics in Canva

- Design Graphics: Use Canva to create marketing visuals that guide leads to our social media or sales pages.
- Focus on eye-catching designs to drive engagement.

7. Managing Files and Documents

- File Storage (Ignite): Upload and organize documents in their respective folders (e.g., Canzel Business Brokers, Delegate Everything But Sex).
- Always ensure documents are properly named and stored in relevant folders for easy access.

8. Daily End-of-Day Checklist

- To-Do List Review: Mark off completed tasks and ensure all pending tasks are carried over to the next day.
- Clock Out: Remember to clock out and report any discrepancies.