

OPERATION VERVE ONBOARDING CHECKLIST

Get your new staff running like a well oiled machine without you right from Day 1

If you're driving your company forward to ongoing expansion you have probably stretched out to hire new staff. This can be a challenging time for everyone. You need to keep your current people happy, while working through long To-Do lists, all the while trying to minimise the uncertainty of adding someone new to the fold. As the boss, you need to make sure all the i's are dotted and the t's are crossed. Necessity often forces the administrative parts of the process to take centre stage.

But do you remember the last time you started a new job? Your new team member does need to have their pays set up properly and their emails working, but as the new kid on the block, they have other worries pressing. Their biggest priority is often managing the social and emotional fears of new beginnings. They're nervous about feeling welcomed and valued. They want to have confidence that their boss is going to look after them at work. And they need to hit the ground running with training that boosts their confidence and productivity right from the start.

Take a look at these shocking facts to see what's really at stake with your staff onboarding.



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10 shocking facts about hiring staff

1. For every thousand employees working, Australian businesses lose \$13.5 million each year from ineffective training. It costs a lot when employees make mistakes, work too slowly, or start missing work altogether because they're disengaged.
2. Research indicates that up to 20% of new hires leave their employer in the first 45 days of working their new job ...this means one in five employees only work for six weeks before they quit!
3. Believe me, you want your staff to stay. It costs 2 - 3 times a person's annual salary to replace them if they leave.
4. Having said that, it can be hard to tell who will stay. 69% of employees say they're considering looking for new employment opportunities, or they've already started the search.



"Working with Kerry Anne from Operation Verve has allowed my business capacity to increase without me being tied to all the work myself. We worked together to develop my staffing plan, document my business operations, then delegate these tasks to my expanding team. This strategic development of customised processes has been integral to my sustained growth over the past 12 months"

Ashley Hann, White Knight Catering Services



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5. One thing you can count on though, is that your staff expect to be trained properly. 40% of employees who don't feel that they have been trained to perform well will leave their job within the first year.

6. This means the writing's on the wall for a lot of employers ... 1/3 of employees report that they have received zero training, and a whopping 58% of managers said they didn't receive any management training at all.

7. A frighteningly large portion of companies admit they need to lift their game. 40% of organisations rated their onboarding programs as less than moderately effective.

8. On the flip side, there are big wins for those who get this part of their growth plan right. Companies with structured and standardised onboarding processes experience 54% higher productivity from their new staff, and twice as much engagement.

9. They also see significant gains in the metrics that show your staff will stick around for the long haul including employee turnover, absenteeism, productivity, and employee satisfaction.

10. And the cherry on the cake is the boost you get on your bottom line when you get your onboarding right. 54% of companies with effective onboarding systems report 78% increases in revenue.



"After working with Kerry Anne we have a whole host of documentation and a very clear set of well organised systems to run our business. When we bring on new staff, we now have a well established onboarding system to guide us through each step without missing anything. Then, when we are setting our new team members up we have clearly defined processes for them to follow right from Day 1."

Chris Caley, No Pong

Announcing Your New Onboarding System!

Over the next few pages you will see a new staffing pathway roll out before you like red carpet. This template is the fast track you need to build an onboarding system that sings every time you expand your team. Endless sticky notes and reminders for things you forgot will be a thing of the past from now on. Build your very own onboarding system to make your own life easier, or pass it on to a manager and be free of the work altogether.



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Company Letterhead

[BUSINESS NAME] Staff Onboarding Checklist

Name: Training Start: DDMMYY Training End: DDMMYY Manager Sign:

Recruitment Steps taken to advertise the position, conduct interview activities, then choose the best candidate		
Date	Trainer	Task
		Recruitment Item #1
		Recruitment Item #2
		etc**
		Please add more lines if required**

Agreements Steps taken to ensure all formal workplace agreements are signed by all required parties		
Date	Trainer	Task
		Agreement Item #1
		Agreement Item #2
		etc**
		Please add more lines if required**



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Set Up
Steps taken to set new staff members up across all of your business systems

Date	Trainer	Task
		Set Up Item #1
		Set Up Item #2
		etc**
		Please add more lines if required**

Resources
Steps taken to provide your new team members with all the resources they will need

Date	Trainer	Task
		Resource Provision Item #1
		Resource Provision Item #2
		etc**
		Please add more lines if required**

Welcome
Steps taken to create a warm welcome for new staff members with the rest of your team and key contacts

Date	Trainer	Task
		Welcome Item #1
		Welcome Item #2
		etc**
		Please add more lines if required**



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Training Steps taken to train your new team members in key business processes, resources and policies		
Date	Trainer	Task
		Training Item #1
		Training Item #2
		etc**
		Please add more lines if required**

Follow Up Steps taken to check back in with your new team member to make sure they are settling in well		
Date	Trainer	Task
		Follow Up Item #1
		Follow Up Item #2
		etc**
		Please add more lines if required**



What Kerry Anne can do for you in regard to developing management systems will have that business of yours humming like a dream! Especially for the business owner who wants to build their business into something that is much bigger than themselves, Kerry Anne is the one to hire to establish the framework.

Denise Hall, Business Exit Strategist

Here's one we prepared earlier for your reference ...



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Name:

Training Start:

Training End:

Manager Sign:

Date	Trainer	Task
Recruitment		
		Job Description
		Selection Criteria
		Review Resume
		Interview
		Check References
		Task-based Trial
		Talent Dynamic Profile
		Application Assessment Matrix
Agreements		
		Position Contract
		Workplace Guidelines
		Leave Guidelines
		Team Member Profile
Set Up		
		Create Team Member Folder in Drive > Assistant > Team Care Ensure this folder is shared only to these accounts: <ul style="list-style-type: none"> - The new team member - Manager - Business Owner



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Date	Trainer	Task
		Create these docs loose in the folder: <ul style="list-style-type: none"> - Invoice Template with Team Member details - Team Member Profile Template - Workplace Guidelines - Leave Guidelines
		Create these folders with these inside: Set Up Folder: Resume, Onboarding Checklist Task Review Folder: (empty) Timesheet
		Set Up With Workplace Buddy
		Create task to review the Team Member's Tasks and Routine doc every 6 months
		Obtain scanned version of signature - insert into Team Care folder
		Obtain bank details
		Obtain personal address
		Obtain superannuation details (if Australian)
		Obtain Tax File info (if Australian)
		Obtain Emergency Contact info
		Add to Team Skype chat
		Add profile pic to their Team Care folder
		Add to our Personal FB Friends list
		Set Up Trello Board
		Set a task to check the team member's Trello board each week
		Set Up Routine doc
		Set Up profile and routine tasks in Task Management Software
		Set Up Leave days in Team Planner and Google Calendar
		Add pay preference to the Company Pays Manual
		Exclude the IP address of all computers in Google Analytics



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Date	Trainer	Task
Resources		
		Provide Company Gmail Account
		Share all Google Drive files
		Provide Task Management Software Manual
		Provide Creating An Operations Manual
		Provide Formating Manual
		Show through business Software for them to use e.g. Animoto, Filmora, Doodly etc
Training		
		Welcome Video
		Company Culture Handbook
		Business Management Manual
		Timesheets, Invoices, Pays and Leave Calendar
		Google Drive
		Creating An Operations Manual
		Task Management Software
		Review Routine doc
Follow Up		
		Week 1 Manager Meeting
		Week 2 Buddy Meeting
		Month 1 Manager Meeting
		Month 1 Feedback Form
		First Quarterly Review



"Kerry Anne has not only taught me how to systematise my business to create more structure AND freedom, she has also changed how I THINK about everything I create and how I put that out into the world. I now have team members doing things for me that I never imagined possible in a way that I LOVE, from selling my programs to writing my content. I'm so much more free and it's only the beginning! "

Tori Crewes, Your Soul Empire



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Where To From Here?

I bet you're inspired and motivated now that you've seen just how sexy your new onboarding system can be! Why don't you get busy setting it up today? Whether you're hiring soon or not, you have everything you need right here now to prepare a silky smooth start for the next lucky member of your team. Get it done!

Then what if you just kept going? You could continue building more and more systems to make your business hummm like a dream. Imagine what your business would look like if you started chipping away at every area, from your marketing, through to site management, and customer service. All of it working like a well-oiled machine, and ready to be delegated to teams who have the confidence and clarity to know exactly what they need to do to grow your business for you.

If you're not sure where to start, never fear! We've cleared the way for you and written a complete guidebook for streamlining the management side of things in your business. Freedom Machine is the book you need to smooth the bumps of business growth and clear new pathways to scale.



"The more you learn, the more you earn. Freedom Machine is the shortcut you need to understand and implement systems and processes. Commit to making a positive change and your efforts will take your business to new heights."

**Dale Beaumont, Business Speaker,
Author & Mentor, Business Blueprint**

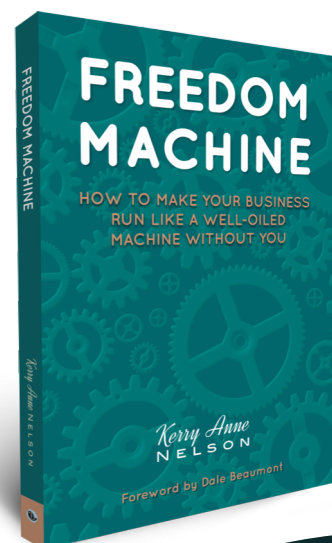
Order your copy of Freedom Machine today.

And as a special bonus, use this promo code
for Free Shipping!

FREEPOST

It's time to turn your business into the operation
you have dreamed of all along.

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ABOUT OUR DIRECTOR

Kerry Anne Nelson is known amongst her friends, family and clients to be a woman obsessed with formalising workplace processes to make things run smoothly. It was no surprise to her community when she decided to turn that into her career. Kerry Anne's life experience almost brought her to her knees when her husband passed away unexpectedly, and she was left to salvage a business that had no systems or processes in place. It was a nightmare.

Since then, Kerry Anne has become Australia's most passionate advocate for systemising businesses. She takes business owners by the hand to help them avoid the pain of managing their staff without documented processes. She has so much to offer after two decades of hands-on practical experience growing her own businesses across service and retail industries, in both online and brick and mortar outlets. Kerry Anne now works as a workplace process architect. She uses her Lean Six Sigma training to maximise her years of experience in strategic management, workplace training, business events, and team leadership to help clients achieve take huge strides towards their ongoing business growth.

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