Standard Procedure for Onboarding a Team Admin

Purpose

To deliver a smooth, supportive, and professional onboarding experience for administrative staff, ensuring they are confident in their role, connected to our team culture, and fully equipped to succeed from day one.

Overview

Administrative employees are vital to the daily operations and success of The Team. This onboarding process ensures clarity, structure, and early engagement with systems, workflows, and expectations.

Step 1: Prepare Before Day One

Technology and Access Setup

- Computer or laptop ready
- Email address and signature created
- Phone extension and voicemail set up
- Access to relevant platforms:
  - Google Workspace
  - CRM
  - BrokerBay (if required)
  - File management tools (Drive, Dropbox, etc.)
  - Internal communication tools (e.g., Slack, phone lists)
  - Remarketeter

Workspace Preparation

- Desk or workstation fully set up
- Office supplies available
- Welcome materials and printed team documents prepared

Step 2: Provide a Branded Welcome Package

Should include:

- Mission, Vision, and Core Values of the team

- Overview of key team members and their roles
- Team policies and procedures handbook
- Organizational chart
- Calendar of meetings and key recurring tasks
- Branding guidelines for any public-facing communication
- Emergency contact sheet and safety procedures

Step 3: First Day Experience

Welcome Activities

- Personal welcome from Anna or Team Lead
- Desk tour and introduction to office logistics (kitchen, supplies, printer, etc.)
- Team introduction — in-person or via welcome message
- Walkthrough of the Playbook and SOP platform (BookStack)
- Overview of the role, daily responsibilities, and expectations
- Gift or note placed on the desk (e.g., branded mug, plant, or team card)

Step 4: Training and Integration

Week 1

- Orientation session covering tools, communication, and office systems
- Training on calendars, file sharing, email templates, and CRM workflows
- Shadowing another admin or operations staff (if applicable)
- Daily check-ins with supervisor or team lead

Week 2–4

- Introduce deeper tasks (e.g., listing coordination, data entry, scheduling, agent support)
- Provide task checklist and workflow documentation
- Set up recurring tasks in calendars or project tools
- Begin participation in internal meetings as appropriate
- Weekly 1:1 coaching or support meeting with supervisor

End of Month 1 Milestones

- Comfortable navigating core systems
- Completes recurring daily and weekly tasks independently
- Clear understanding of communication flow and team support expectations
- Documented 30-60-90 day goals

Files and Resources

- Onboarding Checklist
- Daily Task List Template
- Internal Contact Sheet

- Workflow Maps (e.g., listing setup, agent support tasks)
- Technology Access & Quick Reference Guide
- Calendar of Weekly and Monthly Routines
- Emergency and Office ProceduresSt

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