

Team Onboarding *Masterclass*



All members are fully into their dance seasons or coming to an end to their Term 3! It might seem that finding the time to onboard your staff is challenging, but whether you have brand new staff starting with you or staff that are transitioning into a new role, the right onboarding process is a must in assuring the long term success of your staff. Having the right paperwork in place and a 90 day onboarding process will ensure that you and your staff are headed in the right direction.

A big thank you to our DSOA Team members who have contributed to this system that we created:

PLEASE FILL OUT THE INNER CIRCLE FEEDBACK FORM ON THE TEAM ONBOARDING MASTERCLASS [HERE!](#)

What to Think About When Creating Your Team Onboarding System:

- Q: What documents do I currently have for staff members?
 - Handbooks
 - HR documents
 - Contract (including code of conduct)
 - Non-compete
 - Local & Federal Forms (W4, I9, etc.)
 - Benefits
 - Confidentiality Agreement
- Q: Who do I talk to about the employment laws in my state?
 - Payroll company (ADP)
 - Lawyer - Conscious Counsel
 - Online research
 - Small Business HR companies (Bambee)
- Q: How should I organize my team HR documents?
 - Google Drive and individual staff folders (make these private)
 - Dropbox
 - Online small business HR company (Bambee)
- Q: How often should I update my HR documents?
 - Every year

- Check with your payroll or HR company
- Q: How do I decide what tasks to start with in my 30, 60, 90 day onboarding plan
 - Client facing tasks for admin roles
 - Training on main systems (i.e. phone, email and registration)
 - Owner expectations for each 30 days (KPI's)
 - Work with staff member to create so you are meeting them where they are at

Where to Start When Creating Your Team Onboarding System:

The [Inner Circle Team Onboarding System](#) is a great place to start if you have a new staff member starting or if you have never done any performance reviews.

In the [July Studio Handbooks Masterclass](#) there are examples of two staff handbooks that you should have available when onboarding a new staff member.

Sample 90 Day Studio Manager/Director Onboarding Plan:

Studio Manager/Director Onboarding Guide

First impressions: (1st Month)

- Ask them to document her “first impressions” on the studio and what they love + what they might change. Often, first impressions are the most valuable contributions of positive change – before people lose perspective once they are immersed.
- Have them share these thoughts with you (and only you) and save for future application once they actually do learn about the business.

Dig into business: (1st Month)

- Learn about studio’s vision, mission & core values.
- Read everything they can (historical newsletters, promos, press, website, social media, etc...)
- Explore and discover every inch of the physical studio – know how things work and where things are.
- Study and internalize studio programming and class schedule.
- Sit in on every type of class.

Staff/Client Relationships

- Meet with each program director & review their vision & plans for each program.
- Meet every single teacher and staff member.
- Learn how subbing works – take over handling subbing?
- Make every client fall in love with them.
- Get to know every client – including parent, guardian, nanny/sitter and DANCER!

Front desk/Studio Experience

- Study the front desk experience from behind the desk and from the front of the desk.
- Learn the “how tos” of being at the front desk (is there a checklist?)
- Learn and/or create daily “studio opening” routine and “studio closing” routine
- Learn expectations about answering the phone, VM & email
- Become expert on registration software
- Develop a vision for the Front desk (including staffing, tasks, look, feel) and share with owner/s. Figure out a plan for how to make that vision come to life.

Studio Maintenance

- Learn the “how tos” of keeping the studio running
- Create point of view about things to enhance (first impressions are very helpful here)
- Familiarize self with all maintenance staff/vendors – possibly meet
- Create daily/weekly/monthly checklist of what needs to be done

The business side of the business

- Familiarize self with all business metrics & reporting
- Start to create reports & create POV (point of view) about what kinds of things need to be reported when
- Learn about all bookkeeping aspects of business (revenue collection, payroll, invoices, etc...)

Marketing!

- Study all past flyers/promos/calendar of marketing events
- Decide what resources are needed to market the studio and programs properly
- Make recommendations of where to source resources (e.g. design firms)
- Develop POV about studio brand voice (look, feel, sound)
- Create materials for summer/fall promotion/registration
- Create POV about social media and how to effectively use for the studio – how will this work with program directors

Support Staff

- Determine right staffing needs (front desk, business support, etc...)
- Present staffing plan to owner/s and hire/terminate staff as needed.

Recital

- Obviously, you will need to bring him/her up to speed on the recital very soon.
- Perhaps using last year’s recital planning guide would be the place to start.
- Will you want her handling costumes? Photography? Overall recital execution?

Dancewear Store

- Learn the basics of selling merchandise
- May need to wait and see how quickly _____ gets up to speed on running the studio before we think about putting the store under her supervision as well
- TBD....???

Examples of Team Onboarding Documents:

1. [Employee Benefits Chart](#)
2. [Company Protection Agreement](#)
3. [Sexual Harrassment](#)
4. [Non-Harrassment](#)
5. [Equal Employment Opportunity](#)
6. [Health & Safety](#)
7. [Use of Communication & Computer Systems](#)
8. [Asana Studio Manager / Director Project Plan](#)

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