How to Handle New Employees

TOOLS:

DATABASE USERS & TEAMS

REDTAIL HELPDESK

STYLE GUIDE

TEAM NOTICES

PREFERENCES

Observation: The key to any successful business is building strong employees and fostering a great company culture. It all begins on day one. This is a guide to help your new employee get started in their new job and the CRM they will be working in.

Directions:

1. Add the new employee as a User to your Redtail database.
   MANAGE YOUR ACCOUNT > MANAGE DATABASE USERS & TEAMS > ADD > NEW USER
2. Assign the new employee Redtail's "Getting Started" video tutorials.
   HELP (?) ICON > HELPDESK > TRAINING SESSIONS > TUTORIALS
3. Our helpdesk can teach your new employee how to use Redtail. Your style guide is what teaches them how to use it in your business. Take a few minutes to review the Style Guide with your new employee.
4. Update Team Notices to introduce the new employee to everyone in your database.
   MANAGE YOUR ACCOUNT > MANAGE TEAM NOTICES
5. Help the new employee set their preferred calendar start time, and other preferences.
   MANAGE YOUR ACCOUNT > PREFERENCES
6. Open a "New Employee Workflow" to begin handling the administrative tasks needed to get your employee on board. Check out the example that follows.
   QUICK ADD (+) > WORKFLOWS > WORKFLOW TEMPLATE > NEW EMPLOYEE WORKFLOW
7. Teach your new employee how to manage contacts in Redtail CRM by having them add themselves a contact record. Challenge them to add their spouse and family (if applicable).
   QUICK ADD (+) > CONTACTS > INDIVIDUAL
8. Have them add their emergency contact information to the important information field.
   CONTACT RECORD > (!) ICON > EDIT

Result: The future success of your new employee starts with the foundation you lay for them today. You can even tailor your employee onboarding to the specific features in Redtail that they will be most commonly using. Is your employee going to be managing client events? Have them watch trainings on Seminars. Will they be in a sales focused role? Have them review material on Opportunities.

Helpdesk Link: *http://bit.ly/howtoRTU*

MORE >>

New Employee Workflow

Target date = Date Workflow is created

STEPS **TASKS**

1 OFFICE TASKS *(On target date)*

- Meet and greet with staff
- Read employee handbook
- Complete W-4, I-9 and direct deposit forms
- Emphasize mission statement core values
- Set up email account
- Add as new user in Redtail CRM
- Provide login credentials
- Assign task in the next step of this workflow to the new employee

OUTCOMES

*No Outcomes Recommended

2 REDTAIL TRAINING *(1 Week after target date)*

- Watch “Redtail CRM Overview Demo”
- Watch “Getting Started” Tutorials
- Review Style Guide
- Add yourself as a contact

3 ANNUAL REVIEW *(1 Year after target date)*

- Schedule annual review meeting

**All of Redtail’s best practice recommendations in these “How to Handle” documents are intended to provide a starting point for each office or database to develop their own processes from. These are not intended to comprehensively represent industry standards or compliance requirements. Terminology used in the examples may vary depending on the Database Lists, Templates, and other personalizations unique to each database.*