
OFFICE MANAGER ON-BOARDING PROGRAM

- First 30 Days
 - a) Balanced Scorecard (e.g., business goals, KPIs, mid-year audit, budget, monthly tracking)
 - b) Read, understand, and apply the content found within the Employee Handbook
 - c) Role model the Company Mission Statement and Core Values
 - d) Meet management team, field team, attend several safety tailgate sessions
 - e) Organizational chart and job descriptions
 - f) Receptionist (e.g., entire phone system, points of contact, customer service)
 - g) Payroll (e.g., job budget data entry, tracking reporting, timesheet and payroll rules, data integrity)
 - h) Invoicing, Accounts Payable, Accounts Receivable, and vendor management
 - i) Electronic and hard copy file management (e.g., job folders, two-file system, retention guidelines)
 - j) Job listing (e.g., points of contact, special considerations, ride-along, review all job contracts)
 - k) Review the Company account map to review current job location geography
 - l) Client management; ensure all Client Profiles are current, new client addition, contact all clients
 - m) Review office, yard, and shop security systems (e.g., codes, keys, protocols, contingencies)
 - n) Begin training on BOSS
 - o) Understand how gross margin is calculated
 - p) Learn how to find and understand how to use the Maintenance Budget vs Actual spreadsheet
 - q) Review the work order sheet, proposal form, and tracking procedures
 - r) Understands employee process (e.g., I-9 Forms, new hire process, training, time off requests)
 - s) Insurance Program (e.g., policies, types, claims, renewals, certificate of insurance management)
 - t) Become proficient on administrative procedures (e.g., service requests, HR, legal compliance)
 - u) Review the Company Safety Program (e.g., content, record keeping, tracking, audits, SDSs)
 - v) Review Company Team Leader Training Programs (e.g., content, record keeping, tracking, audits)
 - w) Develop office action plan to improve procedural efficiency
 - x) Receives 30-day non-financial, developmental performance review

- First 60 days
 - a) Attend several Safety Tailgate sessions
 - b) Review all job proposals, enhancements proposals, and existing maintenance and snow contracts
 - c) Coordinate proposal preparation (e.g., document review, typing, packaging, distribution, follow-up)
 - d) Job budget data
 - e) Create a Job Folder with documents, Save As, add photos, customize, save to pdf, print
 - f) Organize, track, and report on Job Quality Audits
 - g) Track Enhancements proposals each week
 - h) Begin working in branch office several days each week
 - i) Facilities Maintenance
 - j) Fleet management, equipment inventory, tool inventory, preventative maintenance schedules
 - k) Purchasing procedures (e.g., uniforms, supplies, operations, inventory management, telephones)
 - l) Revision and publication of staffing retention spreadsheet
 - m) Manage the company website tracking, reporting, and refresh processes
 - n) Develop, publish, and track the social media strategy (e.g., goals, calendar, events)
 - o) Review all marketing documents
 - p) Coordinate the Client Relations Management Program
 - q) Establish formal internal procedures to streamline office functions

- First 90 Days
 - a) Complete administrative desk manual
 - b) Compete BOSS training
 - c) Develop an Administrative Assistant Training Program
 - d) Conduct meetings with workers' compensation vendor to review all open claim status
 - e) Coordinate employee communication plan
 - f) Propose formal administrative recommendations to improve the Company