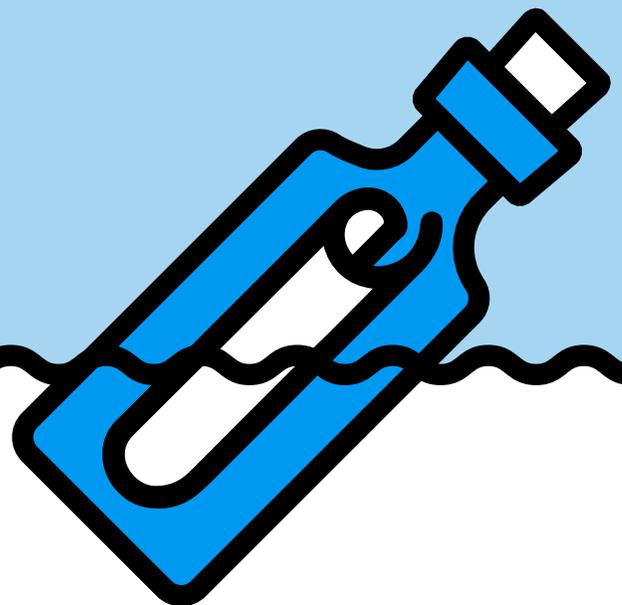


Online Employee Onboarding Cheatsheet

www.ecommerce.expert



Easy Reference Guide

STEP 1 - Offer a paid trial

Not 100% sure whether you want to commit to hiring a candidate full time? Offering a short trial enables you to discover whether you and the new employee are a good match. Do they turn up to work on time? Every day? Do they work to the agreed schedule? Can they follow instructions? Do they have the skills they said they did? Are they able to complete tasks to a high standard?

If you're not sure whether the person will fit into the team then you can give them a short paid trial. It's a low risk way of seeing if they fit. Offer enough money to incentivise them to do the work, but not so much that you mind losing the money if they do a really bad job.

STEP 2 - Send a trial task

Ready-to-Use Templates: [Trial Offer Email Template](#)

If the applicant agrees to your paid trial, send a trial task to test their quality and efficiency. These are the trial offer email template that you can send to 1) an eCommerce copywriter and/or 2) an eCommerce Virtual Assistant. The email template also contains sample guidelines and instructions that you can reuse/update.

STEP 3 - Send “welcome” email with employment guidelines

Ready-to-Use Templates: [Welcome Email Template](#)

This email will be sent to a new hire on your team. Aside from sending your warmest welcome, you'll also add their next steps, work instructions, general guidelines, daily routines and reminders. This will be the very first email they'll receive from you when they start work.

STEP 4 - Collect contact details for onboarding

Ready-to-Use Templates: [Team Contact Details and Schedule Template](#)

Use this handy document to store online contact information and offline contact numbers for your employees. This is useful especially if you get worried about an employee who's been absent for days and you can't contact them online. Or if they get ill, if there are weather events, or other emergencies. You can check their schedule or contact them to make sure they are alright.

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STEP 5 - Orient new team member to job roles and descriptions

Ready-to-Use Templates: [Sample Job Roles and Descriptions Template](#)

This sample offers a handy go-to document where you and your team can check who is responsible for 'what'. This will also be a good summary of your employee's responsibilities, giving them control and ownership of their tasks.

STEP 6 - Orient New Team Member to Standard Operating Processes

Ready-to-Use Templates: [Sample eCommerce Store Knowledge Base Template](#)

This sample eCommerce Store Knowledge Base can be reused for your own store. This includes a full list of eCommerce standard operating procedures that you can edit and update. It can be used to store all your store processes from store setup to maintenance and improvement.

Continued next page...

Trial Offer Email Template For eCommerce Copywriter

Email Subject Line: Trial Copywriting Task: [task title]

Hi [name],

[Greetings]

This is a paid trial. We will pay you \$___ for this task. It will help us get to know whether you are a good fit for our team.

Overall, we are looking for someone with:

- very good written English communication skills.
- creative storytelling skills.
- unique, confident writing style.
- structured thoughts.

And someone who:

- has an eye for detail and can check their own work for quality and compliance
- Is prompt and reliable
- Is available to work a minimum of 20 hours per week in order to complete 4 articles/week.

Trial Period:

This task should take you 3 to 4 hours to finish.

Trial period begins on _____

We expect this task to be completed by _[day/date]_.

Your tasks:

1. Write the article about this topic: [Morning Routines that can affect your work productivity for the day].
Working title: [How does your morning routine really affect your office productivity?]

Come up with your own ideas, too. You need to write an article that discusses how morning rituals affect productivity level of employees. The article should feature at least 1 or 2 of our products and services.

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Your guidelines:

1. The article should be 800-1000+ words
2. The article should be a LISTICLE - Take this [Lesson to learn how to write a Listicle](#).
3. Add a section at the very first part of the article and link it to our website. Suggest a more compelling article title
4. Have links to good and credible references (external links) and links to related our products/services (internal links)
5. Add multiple media types (Youtube videos, images, social media posts)
6. Add sections - headings/subheadings
7. Add a strong call-to-action at the end of the article.
8. Run your text through Hemingwayapp.com and make sure it's succinct. Not too many issues. Some okay, lots no.
9. Run your texts through Grammarly.com to correct awkward phrases, punctuations and spellings mistakes.

Submission:

Save your work in a Google document and share Edit access to [_\[sample@companyemail.com\]_](#) email address. Then send your work updates and the link to your Google document to [_\[sample@companyemail.com\]_](#)

I will look forward to seeing your work.

Thank you,
[\[your name\]](#)
Company Name
[www.yourwebsite.com](#)

Continued next page...

Trial Offer Email Template For eCommerce VA

Email Subject Line: Trial VA Task: [\[task title\]](#)

Hi [\[name\]](#),

[\[Greetings\]](#)

I would like to offer you a paid trial.

Online Employee Onboarding Cheatsheet



The trial will be set for 15 hours of work at a rate of \$2/hour. Do you agree to this rate?

The contract will be closed after 7 days or 15 hours, whichever comes first. I will close the project at the end and we can then discuss what to do next.

Overall, we are looking for someone who is:

- A self-learner and resourceful
- A good communicator, with very good English writing skills
- Prompt, organised and reliable
- Has an eye for detail and can check their own work for quality and compliance
- Available to work a minimum of 20 hours per week in order to complete 4 articles/week.

Your tasks:

We are going to add hundreds of new products into our store. The online store that you will be working on is [\[samplewebsite.com\]](#)

You will be adding [\[product name\]](#) products to [\[samplewebsite.com\]](#).

The aim is to fill the store with good quality [\[product name\]](#), and provide the best price.

Here is the [link to a detailed instructions on how to add products to our store](#).

Spreadsheet:

Attached is a spreadsheet with a list of products.

You will use the product name, SKU, brand, description, dimensions. You will need to double-check all the other information to make sure that they are relevant and correct.

Screencast:

[\[Add screencast instructions if you have.\]](#)

Access Details

Login to: [\[www.samplewebsite.com/admin\]](#)

user: trial

pwd: [samplepassword](#)

Recording Your Time

Login to Hubstaff and use the task "Add Products to the Store" when recording your time.

Online Employee Onboarding Cheatsheet



Put aside a 3 to 4 hours of uninterrupted time to get started. You will not be successful with this project if you work in short batches of time with many interruptions from your friends/family.

Submission:

Complete 3 products and send me the URLs. I will check your work and provide you with advice and feedback.

I am available on Skype ([@sampleSkypeID](#)) to walk you through this process and help you get started. There is a lot to learn, so please let me know if you need help.

I will look forward to seeing your work.

Thank you,

[\[your name\]](#)

Company Name

www.yourwebsite.com

Continued next page...

Welcome Email Template

Email Subject Line: Welcome to [company name] - Getting Started

Hi [name],

Welcome! We are very happy that we'll be working together and look forward to developing a good relationship.

Our aim is to get you started working within our team as quickly as possible.

Because we have a large team who are spread all around the world, it's important that we all use the same processes to manage our work. This results in a streamlined business and better communication.

This email will introduce you to the notifications you'll be receiving as a result of being added to our various accounts and systems.

Salary

We offer a 4 week paid trial. The start date is _____ and the trial ends on _____.

You will be paid _____ per hour. After the trial period this will increase to _____ per hour if you are working well.

You will work a minimum of [20] hours per week. Your weekly maximum will be [40] hours. Please let me know if you can't meet this request.

Payment will be made to your Paypal account every Tuesday morning.

WHAT SHOULD YOU DO NEXT?

Step 1: Getting Paid

Payment is made **every week**, automatically via [Paypal](#). Please send your **Paypal email account** to [\[sampleemail@yourwebsite.com\]](mailto:sampleemail@yourwebsite.com) so we can add it on our Payroll system.

Online Employee Onboarding Cheatsheet



If you prefer other payment methods other than Paypal, e.g. Skrill or UpWork, we **can agree** on a separate payment process for you.

If in case you didn't get your payment for the week, please email [sampleemail@yourwebsite.com], so we can help you figure out the problem and help you fix it.

Step 2: Staff Roles

Wondering who does what? Below are the job roles, descriptions and who this work is usually assigned to.

Store Manager - This person is either the owner of the store, or has access to ALL master accounts. This person is able to spend money, and decides on the overall business strategy.

Store Assistant - This person assists the Store Manager and has access to ALL accounts, but not master privileges. This person usually has access to oDesk in order to make payments to contractors.

Content Producer - Tasked with writing good quality articles and product descriptions.

Community Manager - Tasked with building rapport and links for stores. Reach out to the community via Social Channels

WebDev - Tasked with building the store templates and making backend changes.

Graphic Designer - Tasked with maintaining brand integrity for each store and improving sales through split testing.

For a detailed list of staff job roles and description, check out this [Sample Job Roles and Descriptions](#).

Step 3: Your Tasks

As you join the team, you will be given access to project management system called [Basecamp](#). You will be notified via your email address on how to join and set up your account.

In Basecamp, we store all the major projects that we've been working on and these are broken down into simpler tasks. You will be assigned **a task with a due date**.

You can read our [Standard Operating Processes](#) (SOP's) on how to manage the tasks.

Step 4: Getting Password Access

Our website passwords and account logins are all saved in an online password managing software called [Passpack](#). You will be given access to our Passpack account so you can get access.

Do not store any of our passwords in your computer. We take password security **extremely important**.

Storing passwords in an online secure system is vitally important for the security of our business. If passwords are compromised by being stored on an employee's computer, this will lead to **instant dismissal** because you are compromising the ability for the whole team to function and run the business.

Please read our [Standard Operating Process to understand the strict rules on using Passpack](#).

DAILY HABITS -

Virtual Office Courtesy

Please say "Hello" to me and to our team members when you come online every day.

Keep in mind that despite being part of a virtual office, the same courtesies such as saying "Good morning" and "I'm going to lunch" and "Goodbye" still apply.

We have agreed that you will **turn up each day approximately the same time**, and you work **consistently**, according to the agreed salary terms above.

Recording Your Time

Accurately recording the time you work is **very important**.

We are using [Hubstaff](#) to track our time and efficiency. It is also where we process or Payroll for weekly payments.

To get a Hubstaff account, please check your email for a Hubstaff invitation we've sent you. You will need to **accept the invitation** and follow the link and instructions on how to set up your account.

If in case you encounter Hubstaff issues, please inform [\[sampleemail@yourwebsite.com\]](mailto:sampleemail@yourwebsite.com) via email or Skype and send screenshots of the problem so we can help you address and fix the problem the soonest possible.

Adding Notes and Work Updates

As you work on your task, and track time through the time tracker, you will be given a Notes field to complete. It is important to **add a descriptive summary of the work** that you are working on.

These notes field will help us understand what you are working on, and if you are providing valuable inputs for the task, not just simply ticking off a task. E.g. *"Installed new search tool to improve seo ranking"* is better than *"Installed seo tool"*. The first example shows value to the client, and encourages repeat business.

Don't use technical jargon like *SEO, AJAX, PHP*. **Write your notes in plain English** so everyone understands.

Be descriptive with your notes so we can read back in 5 months and correlate your work with the task completed.

Generic notes are not helpful. "*Website Updates*" is obviously what we do every day and is not helpful to your co-workers. Whereas "*Update contact details for Fred Smith*" is more helpful.

Communication

Communication is **very important in a virtual team**. Your employer and teammates are miles and miles away from you and constant communication is our only way to connect and grow as a team. It is important to:

- Communicate regularly
- Regularly add work updates on your task tickets so that your team members and I are constantly updated about where and what you're up to. So we, too, can follow your work traces.
- Notify us if you'll be late for work for the day.
- Notify us ahead if you plan to go on a holiday.
- Notify us if you can't work because you are sick, or a family member is sick, or other incidents.

Taking Breaks

We do not expect you to work 8 straight hours a day. Instead, we recommend **working 2-3 straight hours** each time. Then a break.

Sometimes, of course, there will be a few short blocks of time because you have jumped in to quickly fix something. Short blocks of time are okay, if there is a valid reason

It is normal and **essential to take a break** from the computer and work during the day. If you need to take a break just put your timer on pause, go for a walk, talk to your family, have lunch, get a coffee; refresh yourself.

Working from home **can mean lots of distractions**. Plan your day, remove distractions and tell your family and friends that you are not available for socialising. When you sit down to work, then you must concentrate carefully.

Read the [free lesson on how to deal and manage your distractions and get actionable tips here](#).

Continued next page...

Respecting Our Work

When you work online, we may get distracted from work by our chores or by our kids, etc. It is important to note that even though, this is an online work, **this is still real work**. We have responsibilities and duties just like in a real office. We need to **set aside our home chores** when it's our schedule to do our real work.

And we need our families and children to **respect our work, too**. Make them understand that when we are working, our work needs our full, undivided focus and attention. We need to get a corner in our room/house where we can work and concentrate without family members distracting us.

Make a regular routine and set yourself to work regularly, you can set your work rules and ask your family members to understand and respect your work.

Check Your Timesheet Activity Report At The End Of Your Shift

At the end of your work day, regularly check your timesheet activity report to review each day's activities and **remove those with VERY low activity**.

We recommend you [take this course in eCommerce University](#) to learn more behaviours and habits for you to become a successful, long-term online worker.

A WORD ON TRUST

From [your name]

I know it can be tempting to charge for more time than you actually worked, and it can also be tempting to work slowly on a task so you can earn more money. I would advise against the temptation as it is only a short-term gain.

I have quite deliberately chosen to work with people based on an hourly charge so that we can trust one another.

If I agree to pay you for all the work you completed on a task, then I expect you to honour that trust and only charge me for the work that was done. This gives you freedom to work on a task unhindered by a time clock.

Sometimes I will lose money on a job because I have underquoted the client, but I will never penalise you for this mistake by paying you less. I take the risk that everyone deserves to be trusted.

As you'll know yourself from your own life experience it doesn't take long to work out which people are dishonest because it shows up in their general character. I'm sure you've also met people like this in your own life and felt this too. The relationship, of course, doesn't last long.

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Most of all, I value long-term relationships that are happy and productive. I look forward to having the same with you.

I hope that you will enjoy working with us, and learn a lot along the way. Let me know if you have any questions regarding your job, wage or work times.

Best regards,
[your name]

Continued next page...

Team Contact Details and Schedule Template

Employee 1

Name:

Nickname:

Role:

Skype ID:

Email Address 1:

Email Address 2:

Phone Number:

City/Country:

Referred by:

Lives nearest to:

Weekly Schedule -

Monday:

Tuesday:

Wednesday:

Thursday:

Friday:

Employee 2

Name:

Nickname:

Role:

Skype ID:

Email Address 1:

Email Address 2:

Phone Number:

City/Country:

Referred by:

Lives nearest to:

Weekly Schedule -

Monday:

Tuesday:

Wednesday:

Thursday:

Friday:

Employee 3

Name:

Nickname:

Role:

Skype ID:

Email Address 1:

Email Address 2:

Phone Number:

City/Country:

Referred by:

Lives nearest to:

Weekly Schedule -

Monday:

Tuesday:

Wednesday:

Thursday:

Friday:

Continued next page..

Sample Job Roles and Descriptions

Wondering who does what? Below are the job roles, descriptions and who this work is assigned to. If you're looking for someone's contact details click on their name and you can chat to them via Basecamp or get their email address from their Basecamp profile page.

[Team Member Name], WebDev

Responsible for maintaining 'healthy', conversion optimised and search engine friendly websites.

- Ad hoc changes and web development
- Website software upgrades, hosting, domain management, renewals, backup and security
- Reduce page speed loads, broken link errors and ensure sites are mobile-friendly
- Manage Google & Bing Webmaster Tools
- Build and maintain software that automates tasks and creates efficiency in the business
- Maintain consistent styles and appearance on all websites

[Team Member Name], Backlink Outreach Manager

Responsible for increasing backlinks and managing product promotions.

- Obtain high quality backlinks to websites
- Manage article content production
- Manage blog publishing schedules in websites
- Maintain and add new directory backlinks
- Manage email newsletters, choosing articles for inclusion

[Team Member Name], Sales Outreach Manager

Responsible for increasing the number of online sales leads

- Create lists of outreach prospects (businesses who might want to buy)
- Manage email communication, back and forth, to conclusion
- Encourage people to make a sales enquiry
- Record the number of sales enquiries in the Monthly Report

[Team Member Name], Community Manager

Responsible for ensuring that we have an active, good quality presence on useful social media channels.

- Ensure a constant stream of content is published to social media channels
- Monitor social media channels and escalate enquiries
- Answer customer service queries or direct to an appropriate person
- Manage customer reviews acceptance and publishing
- Manage customer service surveys and manage responses

[Team Member Name], Writer

Responsible for producing content that attracts organic traffic and converts to goals.

- Write and publish general interest articles
- Write and publish press releases
- Obtain guest post opportunities
- Write and maintain product and content pages
- Write and maintain meta titles and descriptions

[Team Member Name], PPC & Analytics Manager

Responsible for PPC advertising and Analytics reporting

- Maintain Adwords and Bing advertising
- Manage Google Analytics tracking and UTM URLs

[Team Member Name], Graphic Designer

Responsible for maintaining a professional and interesting brand presence.

- Product images
- Promotion artwork
- Banner artwork
- Maintain logo and branding files on KB
- Social media banners and branding
- Branding across all web properties
- Run split tests to improve goal conversion rates

[Team Member Name], Customer Service

Responsible for ensuring customers are happy and we that receive regular reviews.

- Live chat
- Seed Product Reviews, Manage Yotpo Reviews,
- Manage product stock levels

**Find your next trained and
vetted freelancer with
eCommerce skills at
www.ecommerce.expert**

