Executive Assistant Onboarding Plan: Before Day One

Plan window: the week before the start date. Day one is a Tuesday after a long weekend.

Why this plan exists

I'm over capacity and things are getting dropped. This hire exists to fix that. If the new EA's first week is a scramble, they learn that's how we operate. So everything below is done before they walk in.

- **The role:** remove friction from my business and life. Make things happen and make things go away.
- **The schedule:** four days a week, set hours, in the office to start.
- **The trial:** a 90-day trial, both ways. A 30-day check-in, then the 90-day review.
- **How the role is measured:** loops close without follow-up, questions come before starting, confidentiality holds, and my capacity is measurably lighter.
- **Where the work is coordinated:** one project channel, #ea-onboarding, from the first day of prep to the 30-day check-in.

Timeline and critical path

Four items gate everything else. The rest can slip a day; these can't.

1. **Comp confirmed early in the week.** The rate gates the agreement, and the agreement gates payroll.
2. **Laptop ordered on day one of the plan.** It needs set-up time before day one.
3. **Fob and keys requested on day one of the plan.** The lead time is the one thing nobody controls.
4. **First payroll in the start week.** A new employee in the run, so the founder sits in on it.

Day	What happens	Owner
Tuesday	Onboarding channel opens. Laptop ordered. Landlord called for fob and keys.	Founder, BDA
Wednesday	Slack channel list posted. DiSC assessments booked for the new hire and BDA.	Founder
Thursday	Comp confirmed. Role description and agreement terms to the OM.	Founder
Friday	Offer accepted. Laptop, accounts and office ready.	New hire, BDA
Saturday	Welcome brief sent to the new hire.	Founder
Sunday	Employment agreement sent by e-signature, signed and filed.	Founder, OM
Monday	Holiday. Office closed.	
Tuesday	Day one.	Everyone

BDA: tech and office, done by Friday

The Business Development Associate owns all tech set-up and admin. The standard on day one: the new EA opens each system and it works.

☐ Laptop specced and ordered, set up and on the desk by Friday

☐ Company email with Microsoft 365, Outlook and Teams

☐ Slack: full member, added to the channel list posted Wednesday

☐ Password manager: own seat, own vault and the shared team vault, nothing else by default

☐ Notion workspace member

☐ CRM user set up per the onboarding SOP

☐ Claude seat ready

☐ Fob and keys: landlord called, lead time posted in the channel

☐ Office: workstation set up and monitor installed

Proof of done: one post per item in #ea-onboarding as it closes, and a photo of the laptop on the desk Friday.

OM: paperwork and payroll, done by the Thursday of the start week

The Operations Manager owns paperwork and payroll for the start.

☐ Banking details and federal and provincial tax forms collected before day one

☐ Signed employment agreement filed before day one

☐ New hire added to payroll

☐ First payroll run, with the founder sitting in

Proof of done: the payroll confirmation posted in #ea-onboarding after the run.

Founder: role, agreement, Playbook and people, done by Sunday

☐ Comp confirmed by Thursday

☐ Role description written. It becomes an appendix to the employment agreement.

☐ Employment agreement drafted, sent by e-signature and signed

☐ Playbook updated: the roles section, the onboarding SOP and How to Use This Playbook

☐ Daily Sync page built and the private sync channel set up

☐ DiSC assessments booked

☐ Anyone whose work is moving to the EA told in person, before it appears in any document

☐ Welcome brief sent: terms, the tools they'll use, and how I work

☐ First two weeks planned day by day

Nothing about the start goes to the new hire from anyone but me before day one.

Day one

The new EA's job on day one is to get every system working and see what a normal day looks like. Nothing is due.

Time	Owner	What
8:30	BDA	Desk, laptop, phone on Wi-Fi, first logins
9:30	BDA	Systems set-up until 11:00. The new EA opens every login.
11:00	Founder	One hour together: their systems, a normal day, this week
12:00	EA	Lunch
12:30	OM	Paperwork and payroll, 30 minutes
1:00	EA	Finish anything left from the morning, then the day-one Playbook reading
2:30	EA	Enter the two-week plan in their calendar
4:15	EA	First entries in the Open Items register. Day ends 4:30.

Done on day one: every login works, the two-week plan is in the calendar, and the register has its first entries.

How we work this plan

- One post per item in #ea-onboarding as it closes. Don't batch.
- If something will miss its date, say so the day you know, not on the due date.
- Comp, agreement terms or anything personal goes to me directly, not the channel.
- Need a decision from me? End your post with: The decision that needs to be made, and My suggestion and why.
- The channel closes after the 30-day check-in. Anything that outlives it moves to the Playbook.