

Winery Manager's Checklist Series

ONBOARDING for Success

This template is a starting point. Customize it to meet the needs of your people and your organization.

Pre-arrival ("Pre-Boarding")

- Ensure employment contract is signed and filed
- Send any forms or HR related paperwork via email so the new hire can get started on them
- Email policies or legal guidelines
- Email your new hire with details on where to go/where to park on their first day, confirm dress code
- Email the entire team to notify them of your new team member's arrival date and time, include some background and biographical info to jump-start socialization and connection once they arrive.
- Ensure any equipment (computer, tablet, mobile phone) is ready and configured and business cards are prepared, if applicable

Day 1

- Meeting/greeting with Manager to welcome the new team member to the company.
- Give your new team member a warm welcome! Exemplify the friendliness you hope to see them offer your guests.
- Clarify their role and its importance in the grand scheme of the company and its goals.
- Conduct a general job orientation, with a comprehensive tour of your facility, including the vineyard. Share any distinguishing details on your viticulture practices (Bio-dynamic? Chickens? Innovative irrigation system?) or unique brewing practices or ingredients.
- Introduce the new team member to all members of your team.
- Explain how the team communicates with one another and shares knowledge and information
- Assign a "buddy" to the new hire
- Review professional ethics and code of conduct.
- Review all policies, such as safety and security policies and protocols (incl. COVID-19 protocols).
- Review first week's schedule and work hours, breaks, scheduling process and timing
- Provide tasting notes and product information on your wines/beers/ciders and any other merchandise
- Review Membership or Club categories, practices, goals and incentives
- Explain the compensation and benefits.
- Provide employee handbook and answer any questions.
- Verify whether they need help setting up their computer or other equipment.
- Introduce some special and defining stories of the winery/owner(s) or any other elements that make your winery/brewery/cidery different from all the others in your area.

Week 1

- Give employee any initial assignments.
- Touch base each day to ensure they are settling in.
- Review employee performance evaluations and set goals.
- Review the employee's probationary period.
- Check that equipment assigned to the employee is functioning and answer related questions.
- Ensure employee has met with key colleagues and with their buddy.
- Review special and defining stories of the winery/owner(s) or any other elements that make your winery/brewery/cidery different from all the others in your area.
- Invite employee to connect with any company social media accounts.
- Give the employee time to review any promotional marketing and informational videos

Month 1

- Continue to provide regular feedback.
- Ask for feedback from the employee.
- Review past assignments and tasks
- Review upcoming assignments and tasks
- Ensure employee is on schedule with training.
- Check that employee payroll is running smoothly
- Schedule regular meetings to keep employee engaged

After 3 Months

- Schedule an informal performance review/constructive coaching session.
- Review past and future assignments and tasks
- Set performance goals.
- Discuss broader career goals.
- Give and ask for feedback.
- Check employee progress on training.
- Continue to provide regular feedback.
- Discuss end of probationary period.

After 6 Months:

- Conduct six-month performance review
- Review employee goals and progress so far
- Set goals and objectives for the next 6 months
- Check that employee has received all necessary training.

After 1 Year:

- Conduct a yearly performance review.
- Recognize their first year at the company.
- Discuss goals, projects and plans for the upcoming year.
- Answer any questions and give/receive feedback.
- Discuss compensation and raise policies

Give us a call to discuss how to customize this template for different roles and to best meet your needs!

Ashli Komaryk - (604) 220-4682

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