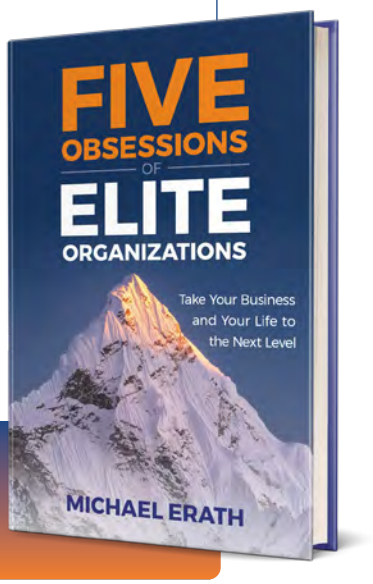
WELCOME TO YOUR SAMPLE EMPLOYEE JOURNEY PLAYBOOK!

You're about to get an inside look at how elite organizations design an employee experience that drives loyalty, performance, and long-term success. This playbook is a resource companion to *The Five Obsessions of Elite Organizations*, giving you a practical framework to shape every stage of your team's journey—from onboarding to career growth.

Use this as a guide to craft a workplace where people don't just work—they thrive.



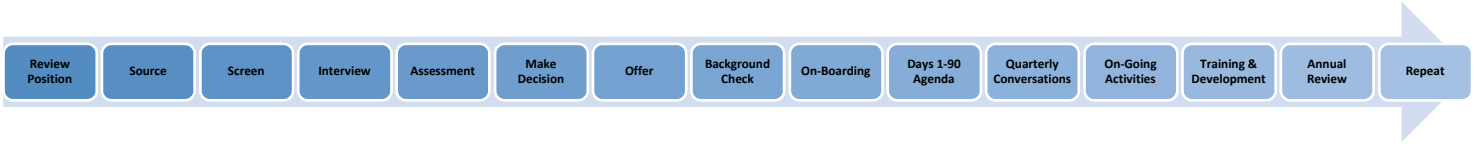
Get even more value out of the book with Michael Erath's AI Clone. →

AskMichaelErath.com

Best Practices Employee Journey Playbook

This is a full sample of one section of the Playbooks that result from one of the Process Optimizer sessions and what they look like after the client has completed their review, test, and prove, follow up work.

Please feel free to adapt this Employee Journey into your own business wherever you feel it would add value.



Purpose: To identify the key stages of our employee journey, from the time an employment need arises through the end of employment, in a way that drives an outstanding employee experience and sets our employees, and organization, up for success.

Trigger: Hiring need identified

Deliverable: A well onboarded, highly engaged, successful and happy employee who is an advocate for our organization.

Measurables: # of open positions, days to fill position, cost to hire, conversion rate (applicants/new hire), offers accepted %, employee retention at 30 days, 90 days, rolling 12 months, conversion rate (probation period/full time), employee satisfaction score (net promoter), employee tenure, manager completion of Quarterly Coaching Conversations, manager completion of annual review

Handoff: employee, employee manager

Owner: HR Manager

1. **Need identified through replacement position or forecast need identified**
2. **Meet with Hiring Manager to review job requirements, measurements (job scorecard), sourcing strategy**
3. **Identify best strategic areas to source candidates based on position or use recruiter**
4. **Post position in identified areas or begin outbound recruiting**
    a. Start new hire onboarding checklist
5. **Receive and review applications**
    a. Use filter questions to assist with application screening
    b. Reject applications as appropriate with a polite email
6. **Schedule candidates for a phone screening and determine if screening will be done by HR or by the team leader**
7. **Hold phone screening**
    a. Discuss vision, culture and what life looks like inside the organization (use this to set expectations and initially filter weak applicants)
    b. Use form to ask Core Values questions and record responses
    c. Outline hiring process and timeline
    d. Reject applications as appropriate with a polite email
8. **Meet with Hiring Manager or appropriate team members to review phone screen results**
9. **Schedule first interview with appropriate people (Hiring Manager, Team Leader, etc.)**
    a. Hold first interview and use form to ask questions and record responses
    b. Discuss our company vision and purpose, history, culture and reinforce what life looks like inside the organization to re-affirm expectations
    c. Revisit Core Values based on their phone interview Q&A to go deeper and look for validation of alignment or areas of concern (see examples from *Topgrading* and *Who*)
    d. Evaluate for position alignment by probing their education, experience and other information gained about their background
    e. Evaluate next steps, timeline, and schedule next interview as applicable
10. **Meet with HR to review interview results**
    a. Determine any gaps or questions to have answered in second interview
    b. Reject applications as appropriate with a polite email
11. **Schedule second interview with another manager**
12. **Hold second interview**
    a. Reinforce culture
    b. Use form to ask questions and record responses
    c. Consider gathering additional information through casual conversation like favorite restaurant or other intel that you can later use to reward and recognize achievements
    d. Ask any questions surfaced by HR and Hiring Manager
13. **Meet with HR and Hiring Manager to review results**
    a. Reject applications as appropriate with a polite email
14. **Schedule successful candidates for assessment** (Kolbe, DISC, Strengths Finder, Culture Index, Predictive Index, etc.)
15. **Meet with Hiring Manager to review assessment results and determine if another interview is needed**
    a. Schedule and hold interview if needed post-assessment
        i. Use questions identified during the assessment
        ii. Record results on applicant form
16. **Make decision**
    a. Align with HR on compensation
17. **Make verbal offer (HR, Team Leader or CEO as appropriate)**
18. **HR follows up with written offer and obtains any authorizations for background checks**
19. **Complete background checks**
20. **Send employee an outline of the onboarding agenda for the first 90 days and any other information**
    a. Benefits, documents required, etc.
    b. Coaching Conversations overview and schedule (1, 2, 4, 6, 8 and 12 week intervals is recommended)
21. **HR to send out internal communication announcing new hire**
22. **Internal team executes new employee onboarding checklist**
    a. IT, Marketing, Facilities, Accounting, etc.
23. **Day 1: Complete employee welcome and Day 1 agenda**
    a. Tour (bathroom, break area), welcome swag bag, lunch, employment verification, company culture and history video
    b. Employee handed off to Hiring Manager or Team Lead as appropriate for balance of Day 1 according to agenda outline
24. **Complete Days 2-90 onboarding agenda**
    a. Job shadow (position, upstream, downstream) and mentoring
    b. Process Playbooks review
    c. Systems training
    d. Meet with key Leadership Team members
    e. Time with Operations and other key areas of the business
    f. Competency reviews against benchmarks
    g. Week 1 Coaching Conversation between Direct Leader and new employee – set action items as necessary
    h. Week 2 Coaching Conversation between Direct Leader and new employee – set action items as necessary
    i. Week 4 Coaching Conversation between Direct Leader and new employee – set action items as necessary
    j. Day 30 HR touch base
        i. HR to identify any gaps, opportunities or issues
        ii. HR to meet with Hiring Manager as needed based on touch base
    k. Week 6 Coaching Conversation between Direct Leader and new employee – set action items as necessary
    l. Week 8 Coaching Conversation between Direct Leader and new employee – set action items as necessary
    m. Day 60 Hiring Manager touch base
        i. Identify any gaps, opportunities or issues
25. **Day 90 and every 90 days for the remainder of employment**
    a. Quarterly Coaching Conversation between Direct Leader and new employee – set action items as necessary.
    b. If employee is not meeting expectations around Core Values or Performance, implement Performance Coaching Plan to ensure employee is either coached up or coached out
26. **Company and employee events**
    a. Team building, holiday party, birthday, anniversary
27. **Training and development as planned**
28. **Annual review process**
    a. Include self-assessment and career path conversation as appropriate
29. **Repeat quarterly conversations and annual review process**
30. **Termination and off-boarding process as needed**

ALL ABOUT
Next Level Growth

› QUESTION

What is Your **Next Level?**



Do you have a vision to multiply revenue, secure investment, exit your business, scale your social impact, or build a legacy? I'll help you articulate your vision and get there faster than you ever thought possible.

Together, we'll analyze your situation, plan your strategy, then kick off the journey with two or three days of Base Camp to work with your leadership team to implement a custom business operating system based on the Next Level Growth Approach. We'll follow this up with quarterly and annual strategic meetings to continue leveling up, until we reach your summit.

› INSIGHT

Every Organization Already Has an **Operating System.**

Yours is perfectly designed to get the results you're getting.

Most organizations operate on a system that has developed organically and often haphazardly over time. It's full of inefficiencies that result from unclear roles, responsibilities, and processes. It often lacks the galvanizing force that comes from a compelling vision, mission, and meaningful values. And almost always, it lacks the power of a winning strategy set up to create a truly elite organization.

What got you here, won't get you to the summit!

To reach your Next Level, and eventually the summit of your business mountain, you will need an operating system built on proven principles, custom-configured for your organization.

› CONCLUSION

It's Time for an Upgrade.

FIRST STEP

Take the Elite Organizations Assessment and in just 7 minutes, you'll get a customized report based on your answers that is filled with resources to help you get immediate value.

NextLevelGrowth.com/Assessment

"Inspiration is perishable...act on it quickly."

Naval Ravikant