New Grow Team Member workflow SOP

Steps to follow when a potential member is added to your workflow

Step one: Reach out (first contact to set up shadow of team)

- Read any notes that have been added (scroll down to find initial notes)
- Call the team member within 3 days of receiving the workflow
    - If you had to leave a message
        - *Write any notes in the card (i.e., left a message on 2/17/21 or mailbox was full). Remember to hit the save button.
        - Select the name and snooze the card for 3 days by clicking on the snooze button. It looks like a clock above the names on the right side. You will be notified again when it is unsnoozed and will it remind you to reach out again
        - If you have not gotten an answer after reaching out 3 times, reassign the card back to the coordinator who sent it to you making sure to write any notes in the card. If you scroll down the workflow, you will see initially who assigned it to you.
    - If you got a hold of them
        - Setup day/time for them to shadow
            - Let them know exact time and place you will meet them
            - Shadows do not need to check in as they are not on the team yet
        - *Write any notes in the card (ex: date of when the shadow will take place)
        - Select name and complete step

Step two: Shadow

- *Write any notes that came out of the shadow
- If they want to continue on to join the team
    - Set up training date
    - Write the date of training in the notes
    - Select name and complete step
- If they don't think the team is the right fit
    - Send back to GS coordinator

Step three: Train

- *Write any notes that came out of the training
- If they want to join the team
    - Select name and complete step
- If the don't think the team is the right fit
    - Send back to GS coordinator

Step four: Add to team

- Let Pastor Mary know to add them to the team
- Schedule them to serve (Make sure they know they will receive an email with instructions on how PCO works and encourage them to watch.)

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* Do not check the box that says: save this note to “name” profile
** Whenever you try to reach them, always try 3 times before you send them back to the GS Coordinator.

- First time is a phone call
- Second attempt is a text message (sometimes people respond better this way)
- Third attempt can be an email