



# COMMUNITY GROUP LEADER ONBOARDING PROCESS

NAME: \_\_\_\_\_

- \_\_\_ Create new Doc on Google Drive (CG Leader Profiles - Pending) AND a physical folder with all onboarding documents
- \_\_\_ Send Initial Assessment Email, job description, and process overview
- \_\_\_ Email TCC Staff to send Background Check
- \_\_\_ Send Reference Form to three references
- \_\_\_ Send Enneagram email with instructions and code
- \_\_\_ Send link to schedule Apprentice Assessment Meeting
- \_\_\_ Complete Leadership Assessment Form (after reviewing Apprentice Assessment Form, references, and Enneagram)
- \_\_\_ Meet with Apprentice for Initial Assessment
  - \_\_\_ Establish development plan & identify potential launch date
  - \_\_\_ Review plan & launch date with Apprentice's CGL
- \_\_\_ Send Next Steps & Pre-Launch Meeting email
- \_\_\_ Meet with Apprentice for Pre-Launch Meeting
- \_\_\_ Finalize all CGL Onboarding tasks
  - \_\_\_ Create new CG on Planning Center Groups
  - \_\_\_ Switch to CGL on Planning Center People profile (Custom Tab — Community Group Leader)
  - \_\_\_ Add CGL and Women's Lead to People Workflow (CG Leaders, Womens Leads, and Coaches)
  - \_\_\_ Add to Monthly Update Google Form
  - \_\_\_ Add to all pertinent Google Drive lists
  - \_\_\_ Connect CGL to Coach via email
- \_\_\_ Apprentice has signed CGL Job Description