Hotel Employees Onboarding Guide

VM Cloud Edition

Version 8.22-2

HOW TO USE THIS DOCUMENT

This set of onboarding checklists is designed as best practices for onboarding a new employee at a hotel with Visual Matrix PMS and MOP by Visual Matrix.

> **An online version of the role-based checklists in this guide is available at https://visualmatrix.com/onboarding-guide**

GENERAL GUIDELINES

The general guidelines provided in this section are intended as sample best practices. Your hotel, hotel group, or brand may have additional guidelines or requirements. Where available, those guidelines should be followed in conjunction with the example checklist provided here.

ROLE-SPECIFIC CHECKLISTS

The remainder of this document consists of role-specific onboarding and training guides for new hotel team members using the Visual Matrix PMS and MOP by Visual Matrix. These checklists are designed to ensure that each new employee has access to the specific materials and training made available for their role. It is our hope that these guides will help to provide the very best experience for each and every end user.

Visual Matrix training bundles are composed of the specific training courses that are best suited for each listed role. Team members at the hotel may access and enroll in any available training course at https://university.visualmatrix.com, even if that course is not a part of their required bundle. Each training course successfully completed provides the user with a certificate of completion.

You may print the single page checklist needed for a new employee and ask them to complete the checklist as they complete each task.

Once a new team member has completed the checklist for their new role, they should be ready to access and use Visual Matrix PMS and MOP By Visual Matrix.

LATEST VERSION OF THIS GUIDE

The latest version of this guide may be found at: http://visualmatrix.com/onboarding-guide. We recommend that you check occasionally for updates to the content. There is also a digital version of each checklist available at this link if you would prefer to enroll your new employee into an online version of their checklist.

GENERAL GUIDELINES - ORIENTATION AND ONBOARDING

These general staffing items are example guidelines and best practices. Each hotel should develop its own policies and best practices or adhere to Brand Standards where applicable.

DATE OF COMPLETION	DESCRIPTION
	PRE-HIRE
	Source Employees – Post Position (Company Website, Social Media (Facebook), Local Papers)
	Review Applicants, Schedule, and Interview Candidates
	Make Offer - Discuss Start Date and Wages
	Background Check
	ORIENTATION
	New Hire Paperwork and Processing
	Mission Statement – Core Values - Company Policy and Procedure (HR Manual)
	Safety and Security (Both Employee and Guest perspectives)
	Key Management (Sign in – Sign Out Policy)
	OSHA – HAZMAT – SHARPS
	Robbery
	Safety Meetings
	Emergency Procedures (On Call Team Members, 911, Active Shooter)
	Guest and Employee Privacy (I.e., not giving out schedules or room numbers out loud)
	Uniforms and Nametags
	Time clock and Schedule Posting -Breaks and Lunch Break
	System Logins (PMS, MOP, Key system, etc.)
	Pay Schedule
	Team Huddles (Morning Stand-Ups or Weekly Huddles)
	Introduce to Team Members
	Property Walk/Tour
	Public areas (pool, courtyard, guest laundry, fitness center, breakfast area, vending, etc.)
	Private areas (offices, break room, hotel laundry, storage/supplies, restrooms, etc.)
	ONBOARDING/TRAINING (POSITION SPECIFIC)
	Dedicated Trainer – Introduce New Team Member to their Trainer
	Outline Duties and Responsibilities for the Position
	Expectations – Per Position (guest room cleaning process, PM schedules, rate strategies, cash management, room status updates, etc.)

FRONT DESK AGENT

Employee Name: _____   Hire Date: _____

DATE	DESCRIPTION
	Create an account in Visual Matrix University - *Visual Matrix University offers training courses for VM Cloud, VM Desktop, and MOP. Access the university at https://university.visualmatrix.com*
	Complete the Front Desk Agent Training Bundle (4 hours) - *The Front Desk Agent Bundle consists of select lessons from the following courses within Visual Matrix University: Front Office, Housekeeping, and Maintenance. Access the FD Agent Training bundle at: https://visualmatrix.com/fd-bundle*
	Get a Visual Matrix User Login – *Now that your training bundle is complete, have a manager create your login in Visual Matrix. How to create a login: https://visualmatrix.com/create-login*
	Go through "The Top 10 Shortcuts for Visual Matrix" - *Optimize your daily tasks and procedures by utilizing these 10 shortcut and software features within VM. Access the Top 10 Shortcuts at: https://visualmatrix.com/shortcuts*
	Go through "The Top 10 Bookmarks for Visual Matrix" - *Keep important Visual Matrix websites saved and just a click away. Access the Top 10 Bookmarks at: https://visualmatrix.com/bookmarks*
	Learn about accessing Visual Matrix Support (knowledge base, community, tickets, chat) - *Visual Matrix offers multiple platforms in which knowledge can be gathered and shared, making your day to day easier.* *Access at: https://visualmatrix.com/support*
	Create a User Profile on the Visual Matrix Portal – *The Visual Matrix portal grants access to:* • *Knowledge Base – education and tutorials with videos and walkthrough guides* • *Online Chat – chat with support agents to get additional help* • *Support Tickets – view and access open or past support tickets for your property* • *VM Community – peer-to-peer forum where Visual Matrix users come together* *Access at: https://help.visualmatrix.com*

	Complete the MOP - Front Desk Bundle (1 hour) - *Learn how to access and monitor activities regarding the cleaning of guest rooms, maintenance work orders, special projects, and room status changes. Access at:* *https://visualmatrix.com/mop-fd*

FRONT DESK NIGHT AUDIT AGENT

Employee Name: _____ Hire Date: _____

DATE	DESCRIPTION
	Create an account in Visual Matrix University - *Visual Matrix University offers training courses for VM Cloud, VM Desktop, and MOP. Access the university at https://university.visualmatrix.com*
	Complete the Front Desk Agent Night Audit Bundle (4 hours) - *The Front Desk Night Audit Bundle includes lessons from the following courses in VM University: Front Office, Housekeeping, Maintenance, and Accounting. Access at: https://visualmatrix.com/audit-bundle*
	Get a Visual Matrix User Login – *Now that your training bundle is complete, have a manager create your login in Visual Matrix. How to create a login: https://visualmatrix.com/create-login*
	Go through "The Top 10 Shortcuts for Visual Matrix" - *Optimize your daily tasks and procedures by utilizing these 10 shortcut and software features within VM. Access the Top 10 Shortcuts at: https://visualmatrix.com/shortcuts*
	Go through "The Top 10 Bookmarks for Visual Matrix" - *Keep important Visual Matrix websites saved and just a click away. Access the Top 10 Bookmarks at: https://visualmatrix.com/bookmarks*
	Learn about accessing Visual Matrix Support (knowledge base, community, tickets, chat) - *Visual Matrix offers multiple platforms in which knowledge can be gathered and shared, making your day to day easier. Access at: https://visualmatrix.com/support*
	Create a User Profile on the Visual Matrix Portal – *The Visual Matrix portal grants access to:* *Knowledge Base – education and tutorials with videos and walkthrough guides* *Online Chat – chat with support agents to get additional help* *Support Tickets – view and access open or past support tickets for your property* *VM Community – peer-to-peer forum where Visual Matrix users come together* *Access at: https://help.visualmatrix.com*

DATE	DESCRIPTION
	Complete the MOP - Front Desk Bundle (1 hour) - *Learn how to access and monitor activities regarding the cleaning of guest rooms, maintenance work orders, special projects, and room status changes. Access at: https://visualmatrix.com/mop-fd*

FRONT DESK MANAGER

Employee Name: _____ Hire Date: _____

DATE	DESCRIPTION
	Create an account in Visual Matrix University - *Visual Matrix University offers training courses for VM Cloud, VM Desktop, and MOP. Access the university at https://university.visualmatrix.com*
	Complete the Front Desk Manager Bundle (6 hours) - *This bundle includes lessons from the following courses within Visual Matrix University: Front office, Housekeeping, Maintenance, Accounting, and Sales & Marketing. Access at: https://visualmatrix.com/fdm-bundle*
	Get a Visual Matrix User Login – *Now that your training bundle is complete, have a manager create your login in Visual Matrix. How to create a login: https://visualmatrix.com/create-login*
	Go through "The Top 10 Shortcuts for Visual Matrix" - *Optimize your daily tasks and procedures by utilizing these 10 shortcut and software features within VM. Access the Top 10 Shortcuts at: https://visualmatrix.com/shortcuts*
	Go through "The Top 10 Bookmarks for Visual Matrix" - *Keep important Visual Matrix websites saved and just a click away. Access the Top 10 Bookmarks at: https://visualmatrix.com/bookmarks*
	Learn about accessing Visual Matrix Support (knowledge base, community, tickets, chat) - *Visual Matrix offers multiple platforms in which knowledge can be gathered and shared, making your day to day easier. Access at: https://visualmatrix.com/support*
	Create a User Profile on the Visual Matrix Portal – *The Visual Matrix portal grants access to:* *Knowledge Base – education and tutorials with videos and walkthrough guides* *Online Chat – chat with support agents to get additional help* *Support Tickets – view and access open or past support tickets for your property* *VM Community – peer-to-peer forum where Visual Matrix users come together* *Access at: https://help.visualmatrix.com*

DATE	DESCRIPTION
	Complete the MOP - Front Desk Bundle (1 hour) - *Learn how to access and monitor activities regarding the cleaning of guest rooms, maintenance work orders, special projects, and room status changes. Access at: https://visualmatrix.com/mop-fd*

HOUSEKEEPER

Employee Name: _____   Hire Date: _____

DATE	DESCRIPTION
	Create an account in Visual Matrix University - *Visual Matrix University offers training courses for VM Cloud, VM Desktop, and MOP. Access the university at https://university.visualmatrix.com*
	Complete the Housekeeper Bundle (2 hours) - *The Housekeeper Bundle consists of select lessons from the following courses within Visual Matrix University: Front Office, Housekeeping, and Maintenance. Access at: https://visualmatrix.com/hk-bundle*
	Get a Visual Matrix User Login – *Now that your training bundle is complete, have a manager create your login in Visual Matrix. How to create a login: https://visualmatrix.com/create-login*
	Go through "The Top 10 Bookmarks for Visual Matrix" - *Keep important Visual Matrix websites saved and just a click away. Access the Top 10 Bookmarks at: https://visualmatrix.com/bookmarks*
	Learn about accessing Visual Matrix Support (knowledge base, community, tickets, chat) - *Visual Matrix offers multiple platforms in which knowledge can be gathered and shared, making your day to day easier. Access at: https://visualmatrix.com/support*
	Create a User Profile on the Visual Matrix Portal – *The Visual Matrix portal grants access to:* • *Knowledge Base – education and tutorials with videos and walkthrough guides* • *Online Chat – chat with support agents to get additional help* • *Support Tickets – view and access open or past support tickets for your property* • *VM Community – peer-to-peer forum where Visual Matrix users come together* *Access at: https://help.visualmatrix.com*

DATE	DESCRIPTION
	Complete the MOP - Housekeeper Bundle (1 hour) - *Learn how to access your assignments, create work orders, log lost and found items, and effectively log the status of each room you are assigned. Access at: https://visualmatrix.com/mop-hk*

HEAD HOUSEKEEPER

Employee Name: _____ Hire Date: _____

DATE	DESCRIPTION
	Create an account in Visual Matrix University - *Visual Matrix University offers training courses for VM Cloud, VM Desktop, and MOP. Access the university at https://university.visualmatrix.com*
	Complete the Head Housekeeper Bundle (3 hours) - *The Head Housekeeper Bundle consists of select lessons from the following courses within Visual Matrix University: Front Office, Housekeeping, and Maintenance. Access at: https://visualmatrix.com/headhk-bundle*
	Get a Visual Matrix User Login – *Now that your training bundle is complete, have a manager create your login in Visual Matrix. How to create a login: https://visualmatrix.com/create-login*
	Go through "The Top 10 Bookmarks for Visual Matrix" - *Keep important Visual Matrix websites saved and just a click away. Access the Top 10 Bookmarks at: https://visualmatrix.com/bookmarks*
	Learn about accessing Visual Matrix Support (knowledge base, community, tickets, chat) - *Visual Matrix offers multiple platforms in which knowledge can be gathered and shared, making your day to day easier.* *Access at: https://visualmatrix.com/support*
	Create a User Profile on the Visual Matrix Portal – *The Visual Matrix portal grants access to:* • *Knowledge Base – education and tutorials with videos and walkthrough guides* • *Online Chat – chat with support agents to get additional help* • *Support Tickets – view and access open or past support tickets for your property* • *VM Community – peer-to-peer forum where Visual Matrix users come together* *Access at: https://help.visualmatrix.com*

DATE	DESCRIPTION
	Complete the MOP – Head Housekeeper Bundle (2 hours) - *Learn how to access, monitor, and update room status changes, assign rooms and special projects and create maintenance tickets. Access at: https://visualmatrix.com/mop-headhk*

MAINTENANCE

Employee Name: _____   Hire Date: _____

DATE	DESCRIPTION
	Create an account in Visual Matrix University - *Visual Matrix University offers training courses for VM Cloud, VM Desktop, and MOP. Access the university at https://university.visualmatrix.com*
	Complete the Maintenance Bundle (3 hours) - *The Maintenance Bundle consists of select lessons from the following courses within Visual Matrix University: Front Office, Housekeeping, and Maintenance. Access at:* *https://visualmatrix.com/maint-bundle*
	Get a Visual Matrix User Login – *Now that your training bundle is complete, have a manager create your login in Visual Matrix. How to create a login: https://visualmatrix.com/create-login*
	Go through "The Top 10 Bookmarks for Visual Matrix" - *Keep important Visual Matrix websites saved and just a click away. Access the Top 10 Bookmarks at: https://visualmatrix.com/bookmarks*
	Learn about accessing Visual Matrix Support (knowledge base, community, tickets, chat) - *Visual Matrix offers multiple platforms in which knowledge can be gathered and shared, making your day to day easier.* *Access at: https://visualmatrix.com/support*
	Create a User Profile on the Visual Matrix Portal – *The Visual Matrix portal grants access to:* *Knowledge Base – education and tutorials with videos and walkthrough guides* *Online Chat – chat with support agents to get additional help* *Support Tickets – view and access open or past support tickets for your property* *VM Community – peer-to-peer forum where Visual Matrix users come together* *Access at: https://help.visualmatrix.com*

DATE	DESCRIPTION
	Complete the MOP – Maintenance Bundle (1 hour) - *Learn how to access work orders with details and photos of the maintenance issue and stay on task with scheduled PMs and other special maintenance projects. Access at:* *https://visualmatrix.com/mop-maint*

REVENUE MANAGER

Employee Name: _____   Hire Date: _____

DATE	DESCRIPTION
	Create an account in Visual Matrix University - *Visual Matrix University offers training courses for VM Cloud, VM Desktop, and MOP. Access the university at https://university.visualmatrix.com*
	Complete the Revenue Manager Bundle (4 hours) - *The Revenue Management Bundle consists of select lessons from the following courses within Visual Matrix University: Management and Revenue Management Live! Access at: https://visualmatrix.com/rm-bundle*
	Get a Visual Matrix User Login – *Now that your training bundle is complete, have a manager create your login in Visual Matrix. How to create a login: https://visualmatrix.com/create-login*
	Go through "The Top 10 Shortcuts for Visual Matrix" - *Optimize your daily tasks and procedures by utilizing these 10 shortcut and software features within VM. Access the Top 10 Shortcuts at: https://visualmatrix.com/shortcuts*
	Go through "The Top 10 Bookmarks for Visual Matrix" - *Keep important Visual Matrix websites saved and just a click away. Access the Top 10 Bookmarks at: https://visualmatrix.com/bookmarks*
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DATE	DESCRIPTION
	Complete the MOP – General Staff Bundle (30 minutes) - *Get an overview of MOP and how the staff in the hotel use it. Access at: https://visualmatrix.com/mop-staff*

SALES MANAGER/DIRECTOR OF SALES

Employee Name: _____ Hire Date: _____

DATE	DESCRIPTION
	Create an account in Visual Matrix University - *Visual Matrix University offers training courses for VM Cloud, VM Desktop, and MOP. Access the university at https://university.visualmatrix.com*
	Complete the Sales Manager Bundle (5 hours) - *This bundle includes courses from within the Sales and Marketing courses of Visual Matrix University. Access at: https://visualmatrix.com/sales-bundle*
	Get a Visual Matrix User Login – *Now that your training bundle is complete, have a manager create your login in Visual Matrix. How to create a login: https://visualmatrix.com/create-login*
	Go through "The Top 10 Shortcuts for Visual Matrix" - *Optimize your daily tasks and procedures by utilizing these 10 shortcut and software features within VM. Access the Top 10 Shortcuts at: https://visualmatrix.com/shortcuts*
	Go through "The Top 10 Bookmarks for Visual Matrix" - *Keep important Visual Matrix websites saved and just a click away. Access the Top 10 Bookmarks at: https://visualmatrix.com/bookmarks*
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	Complete the MOP – General Staff Bundle (30 minutes) - *Get an overview of MOP and how the staff in the hotel use it. Access at: https://visualmatrix.com/mop-staff*

GENERAL MANAGER

Employee Name: _____   Hire Date: _____

DATE	DESCRIPTION
	Create an account in Visual Matrix University - *Visual Matrix University offers training courses for VM Cloud, VM Desktop, and MOP. Access the university at* *https://university.visualmatrix.com*
	Complete the General Manager Bundle* (5 hours) - *The General Manager Bundle consists of the following courses within Visual Matrix University: Management and Revenue Management Live! Access at:* *https://visualmatrix.com/gm-bundle* ** It is also suggested that new General Managers or Owners complete all department training bundles.*
	Get a Visual Matrix User Login – *Now that your training bundle is complete, have a manager create your login in Visual Matrix. How to create a login:* *https://visualmatrix.com/create-login*
	Go through "The Top 10 Shortcuts for Visual Matrix" - *Optimize your daily tasks and procedures by utilizing these 10 shortcut and software features within VM. Access the Top 10 Shortcuts at:* *https://visualmatrix.com/shortcuts*
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	Complete the MOP – Single Property and/or Multi Property GM Bundle (1 hour each) - *Get an overview of MOP and how housekeepers and maintenance staff use it. Learn the administrator side of MOP. Access at* *https://visualmatrix.com/mop-single* *or* *https://visualmatrix.com/mop-multi*