🚀 commonsku New Hire Training Roadmap

This roadmap is designed to take a new team member from "Login" to "Launch" in their first week. By following this structured path, the new hire gains hands-on experience while ensuring company workflows remain consistent.

Phase 1: The Foundation (Days 1–2)

Goal: Understand the "Why" and "How" of the platform through live interaction and expert-led overviews.

- **Attend Onboarding Webinars:** Classes run Monday–Friday, morning and afternoon. Complete Classes 1–4 in order — each builds on the concepts from the last. Pick one time slot per class, whichever works for your schedule:
  - **Onboarding Webinar 1 (Sales):** 9 am EST or 3 pm EST
  - **Onboarding Webinar 2 (Sales):** 10 am EST or 4 pm EST
  - **Onboarding Webinar 3 (Production):** 11 am EST or 5 pm EST
  - **Onboarding Webinar 4 (Finance):** 12 pm EST or 6 pm EST
- **Guided In-App Tours:** Open the **Learning Center** (skubot on the right-hand side) in commonsku and complete the "Basics" tours. This is the best way to get a "feel" for the interface while the webinar info is fresh.
- **Review Company Recordings:** Watch your team's previous onboarding sessions in **Google Drive** to understand your company's specific "house rules."

Phase 2: Role-Specific Mastery (Days 3–4)

Goal: Deep dive into the tools you will use every day.

- **commonsku University:** Watch the **Beginner Module** videos for your specific role (Sales, Production, or Finance). These are short, focused tutorials on specific features.
- **Help Articles:** Use the **Help Articles** to review step-by-step written guides for the tasks covered in your videos.
- **Knowledge Check:** Complete the **Skill-Testing Quiz** in the Learning Center.

Phase 3: The "Sandbox" Assignment (Day 5)

Goal: Practical application. *Note: When testing, always use your own email address as the "Client" or "Supplier" to avoid sending test data to real partners!*

Sales Role	Production Role	Finance Role
1. Create 3 Test Projects: Include a presentation with 4–5 items.	**1. Order Setup:** Create a Sales Order with 3 items and custom decoration. ** Work with your sales team to get this set up*	**1. Bill Entry:** Enter 2–3 **Supplier Bills (Vouchers)** into a test project. ** Work with your sales and production team to get the sales order and POs set up*
2. Customization: Set custom pricing, images, and decoration details.	**2. Complex Shipping:** Set one item "Direct to Client" and one to a "Decorator."	**2. Client Invoicing:** Create and "send" an invoice to your own email.
3. Conversion: Convert to a Sales Order; update	**3. Purchase Orders:** Generate and "submit" POs (*note:*	**3. Payment:** Record a manual payment to

sizes, colors, and quantities.	*email them to yourself*).	move the invoice to **"Paid."**
4. Communication: Email forms to yourself to see status changes.	**4. Verification:** Ensure the project status moves to **"Submitted."**	**4. Completion:** Mark the project **"Completed"** and view it in the **Export** tab.

Phase 4: Verification & Graduation

Goal: Confirming knowledge retention.

- **Skill Testing:** Complete the Quiz Skill Tests in the Learning Center for your module.
- **Manager Review:** Touch base with your manager to go through any best practices.

🚀 commonsku New Hire Training Roadmap

Employee Name: ____________________

Start Date: ____________________

Phase 1: The Foundation (Days 1–2)

Task	Resource	Date	Initials
Onboarding 1 Webinar	Mon-Fri @ 9 AM or 3 PM ET		
Onboarding 2 Webinar	Mon-Fri @ 10 AM or 4 PM ET		
Onboarding 3 Webinar	Mon-Fri @ 11 AM or 5 PM ET		
Onboarding 4 Webinar	Mon-Fri @ 12 PM or 6 PM ET		
Basics Guided Tours	Learning Center (In-App)		
Company Recordings	Internal Google Drive Folder		

Phase 2: Role-Specific Mastery (Days 3–4)

Task	Resource	Date	Initials
Beginner Module Videos	commonsku University		

Help Article Review	Help Center (Knowledge Base)		
Knowledge Check Quiz	Learning Center (Skill Test)		

Phase 3: The "Sandbox" Homework (Day 5)

Complete the track relevant to your specific role.

Sales Track

- ☐ **Create 3 Test Projects:** Include a presentation with 4–5 items.
- ☐ **Customization:** Set custom pricing, images, and decoration details.
- ☐ **Conversion:** Convert to a Sales Order; update sizes, colors, and quantities.
- ☐ **Communication:** Email forms to yourself to see status changes.

Production Track

- ☐ **Order Setup:** Create a Sales Order with 3 items and custom decoration.
- ☐ **Logistics:** Set one item "Direct to Client" and one to a "Decorator."
- ☐ **Purchase Orders:** Generate and "submit" POs (Email to yourself).
- ☐ **Verification:** Ensure the project status moves to **"Ordered."**

Finance Track

- ☐ **Bill Entry:** Enter 2–3 **Supplier Bills (Vouchers)** into a test project.
- ☐ **Invoicing:** Generate and "send" a Client Invoice to your own email.
- ☐ **Payment:** Record a manual payment to move the invoice to **"Paid."**
- ☐ **Completion:** Mark the project **"Completed"** and view it in the **Export** tab.

Phase 4: Graduation & Review

Final Milestone	Date Completed	Manager Sign-off
Project Walkthrough		

Workflow Alignment		

Manager Note: Review naming conventions and internal tags with your new hire to match your company's specific standards before the new hire begins live client work.