

HM Group

Onboarding Plan

QUICK START PLAN



Step 1: Preparation & Setup

- Account is active
- Rollout plan:
 - Week 1 → **Managers & setup (McGee 72)**
 - Week 2 → **Full McGee 72 rollout**
 - Weeks 3-4 → **Sorellina & Slate and Harrington**
- Gather ~15 manager emails and phone numbers.
- **Invite all managers via HM Group** workspace (not "External").
- **Remind managers to Join** the workspace (not create a new one).
- Send an intro email to managers with:
 - Zenzap join link
 - YouTube walkthrough
 - Short explanation of what to expect

” FEEL FREE TO EDIT AND MAKE IT YOURS:

We're trying this new tool for our team communication 😎 It seems easy, professional and fits our needs.

I've already created our account, this is our link to join: <https://join.zenzap.co>

See why teams love Zenzap:
https://youtu.be/6fkdiXD_5xw

Step 2: Manager Training

- Verify **organization settings**:
 - Admins-only group creation
 - Phone numbers hidden
- Pre-create groups for each restaurant and management layer.
- Invite managers directly via email inside **HM Group** (not external).
- Re-invite corrected users if duplicates were created.



MAKE SURE IF:

Each manager sees the right workspace under
My Network → HM Group.






Step 3: Team Enrolment

- Onboard teams one location at a time:

1 McGee 72 → 2 Sorellina & Slate → 3 Harrington

- Schedule **first CSV import** for **Thursday, Nov 6 (same time)**.
- Ensure CSV import correctly assigns all users to HM Group workspace.
- Confirm managers can monitor user joins:
Profile → **Admin** → **Invited Users**
- Double-check that existing invites are not duplicated.

Step 4 - Organization & Structure

- **Create folders** for organization:
 -  Managers
 -  McGee 72
 -  Sorellina & Slate
 -  Harrington
 -  Head Office
- Ensure each employee only sees relevant group chats.
- Train managers on admin controls:
 - Add/remove group members
 - Promote/demote admins
 - Deactivate leavers (auto-removes them + revokes access)

Step 5: Support & Follow-Up

- **Create support group** on Zenzap:
Name: **Zenzap <> HM Group Support**
- Confirm **"All"** group auto-adds new members.
 - If missing → message in support chat.
- After McGee 72 rollout:
 - Review adoption metrics
 - Gather feedback
 - Repeat rollout for other two sites.

✓ Outcome Targets

- All three restaurant locations fully onboarded.
- Managers trained and managing their own groups.
- Folder and group structure organized by site.
- Active support chat for fast help.
- All communication migrated from WhatsApp to Zenzap.
- Stable usage → option to shift to annual plan.