

Scroll down to see the AFTER!

Contractor Guide Before

[company] Contractor Quick Start Guide

Version 1.0.1, published 08.12.2020

Welcome

Hello, and welcome! This is a quick start guide to contracting with [company]. Our goal is to get you up and running quickly! And to anticipate and answer any questions you may have before getting started.

You can learn more about who we are and what we do [here](#) and about our company culture and values [here](#).

So, we'd like to work with you, what's next?

- First thing's first: we'll need to run a Goodhire background check. We'll need your full name and email address to get started, and you'll fill out the rest. If all is clear 🙌, we will ask you to...
 - Fill out a [company]. independent contractor agreement and a W9 using Hellosign
 - Set up Gusto, so we can pay you
 - Fill out the Know Your Team ice breaker – the team will learn about you, and vice versa
 - Log in to Slack and say hi! 🙌
- In the meantime, we will get you set up with...
 - An employee number
 - Your new [company].com email address
 - Other accounts, such as: Jira, Asana, Slack, Harvest, 1Password, Gitlab, and more

We know you must have loads of questions! Here are some answers.

Commented [1]: it's best practice to put links on anchor text, not to have a "here" link.

Commented [2]: unless there are no directions on the Goodhire background check page, and you plan on putting a link to it off here, you don't need to have this part here.

Commented [3]: you don't need to specify the method of signing

Commented [4]: what is Gusto? how are contractors paid? by check or direct deposit? PayPal?

Commented [5]: this is social stuff, should be separate from the legal/administrative stuff, also, this should go after the next bullet. They can't log into Slack until they've gotten a Slack account!

Commented [6]: odd phrase here. in the meantime of what?

Commented [7]: Unless they need to do something with this number, don't need to list it here, I suspect it's an internal HR thing.

Commented [8]: Questions are great for FAQs, but I usually don't use them for stating of basic information like this. For one thing, not everything elegantly becomes a question, and making them so can lead to odd questions, like one here about "should I use the [company] email?" Of course you should! why else would we give it to you?

Please know that — depending on your role — someone will talk you through our process in more detail before you dive into the work.

Administrative Questions

- Do I get any time off? When is [company] closed?
 - As a contractor, you won't get any paid time off. If you need to take time off, we ask that you give us as much notice as possible, so we can plan accordingly. [company] is closed every year on New Year's Eve + Day, Memorial Day, Independence Day, Labor Day, Thanksgiving + Black Friday, and Christmas Eve + Day.
- Do I get any [company] issued hardware or software?
 - Nope! ← simplest answer
- Do you have standups? Am I supposed to attend?
 - Standups happen daily, at 9:30am CT. If you can attend, great! If not, that's ok too — as long as you're clear on your priorities each day.
- Does [company] have a Brand and House Style Guide?
 - Why yes, we do! You can find it [here](#).
- What is [company]'s contact information?
 - Call us: [phone]
 - Email us: [hi@\[company\].com](mailto:hi@[company].com)
 - Send us a postcard: [company], [address]
 - Visit our website: [https://\[company\].com/](https://[company].com/)
 - Follow us on Twitter: <https://twitter.com/company>

Commented [9]: As a contractor, these questions aren't most important. Contractors want to know, how do I submit time, and when do I get paid!

Commented [10]: "administrative" and "process" are similar in meaning. Should be broken down into more specific sections, in particular, for sure need "time tracking and payment"

Commented [11]: any talk of time off should be combined with mentions of calendar, and also notifying team of taking time off.

Commented [12]: contractors know they don't get paid vacation from clients! This isn't really necessary

Commented [13]: should be a separate question from time off.

Commented [14]: not true, contractors get accounts on the apps that the team uses, like Jira, Atlassian, Slack, etc.

Commented [15]: This is developer-specific, should go in the developer section.

Commented [16]: this is only really relevant to writers, marketing people

Process Questions

- Where do I track my time? How often should I enter it? How do I submit my timesheet? How often? What are the different kinds of time I should log?
 - We use the Harvest app to track all time. Please track your time in real-time, as you're working on projects. You can do this via the Harvest integration in Jira, as you start on a ticket. At the end of each week, we ask that you please submit your timesheet. In fact, we can't pay you until you do. If you have questions about which project or category you should log your time to, feel free to ask! ([person] is the best person to ask!)
- When do I get paid?
 - The simple answer: when you invoice. Send your invoice by email to [billing@\[company\].com](mailto:billing@[company].com) — please do so at least monthly, but you can use whatever cadence works for you: semi-monthly, bi-weekly, weekly... just

Commented [17]: Need a better title, this one begs the question, "which process?"

Commented [18]: Too many questions all at once. Reader can parse this information easier if questions are separated.

Commented [19]: also, best to have a time tracking/payment section alone

Commented [20]: this makes it sound like as soon as you invoice, you'll get paid. Also there are multiple answers in here that should get split out into multiple questions for clarity.

Commented [21]: When you use "email" as a verb, the sending is inherent. Can shorten to "Email your invoice to..."

invoice us. Don't forget, you're a 1099 contractor, so we don't withhold any taxes; you'll need to do that on your own and pay for those taxes yourself. Payment is made via direct deposit through Gusto, and you'll typically see that money in your bank account within five business days from when you invoice.

Commented [22]: Unless this is their very first contracting gig, they know this.

- How should I use my [company] calendar? How should I indicate times I am busy for others to see?
 - We ask that you somehow connect your personal calendar with your [company] calendar. However you do this is up to you! You can either share your personal calendar but keep the events private, or you can manually add your personal calendar events to your [company] calendar. Our goal is to make sure we have your availability handy for meetings and project needs.
- What communication tools do you use?
 - Slack is our primary tool for communicating with each other (and sometimes with clients). We expect that you'll have it open throughout the day and set up your notifications, so we can resolve questions and conversations as quickly as possible. Sometimes it's more efficient to have an impromptu Zoom call with each other, so we'll do that. We use email sparingly, and mostly with clients.
- How does #attendance work? What are my responsibilities?
 - We use the #attendance Slack channel kinda like we'd say "hello" and "goodbye" as we come and go from a "regular" office. We ask that you let everyone know when you start work for the day, when you'll be away from your computer, and when you're done for the day. In addition to the channel, we update our Slack status regularly to indicate where we're at: out, focused, etc. We've standardized on five which are used almost universally by everyone, but feel free to be creative if you are doing something special.
- What hours should I keep?
 - This is up to you! But we prefer that you're somewhat reachable during regular business hours which are Monday to Friday, 9am to 5pm CST.
- Do I need to use my [company] email address?
 - Yes! Please do not forward your email from your [company] account to any other email address. Always do [company]'s business with [company]'s email address. (You probably won't send or receive a great deal of email, we're mostly in Slack all day long.)
- What are the expectations around using Slack with clients?

Commented [23]: this would be best combined into another question about time off

Commented [24]: kind of a strange question, why would you be given a [company] email if not to use it

- All client-facing channels include #t7care_, so please be mindful of what you post in those channels. Although, don't be too wary; we trust you to post in those channels when you need something from a client.
- What kind of project or ticket management system do you use?
 - For the most part, we use Jira for technical work and Asana for non-technical work. We have a ticketing system in Jira, so that tickets can be assigned to you and you can change the status as you work on something. Someone will walk you through how to use Jira in more detail, before you start.

Commented [25]: if someone hasn't used Slack before (and even if they have), this needs a little more explanation

Developer Specific Questions

- Where does the code live? How do I make changes? What are feature branches? How do I get my code live?
 - Most of the code you will work with will be in our own Gitlab server: gitlab.[company].com, to which you can get access by asking for it in the #developers Slack channel. We have clients that host with Pantheon, Acquia and platform.sh, so each will have their own setup.
 - We use the [git flow](#) branching model, and use feature branches extensively. Your code will always be reviewed by another set of eyes before it goes live. And we expect that you will spend time reviewing code from others as well. This is how we all learn!
 - Getting your code live is usually a mix of finishing a feature branch, pushing the code into the develop branch, and then doing a release to the main branch. You probably won't be responsible for doing releases to main.

Commented [26]: again, readers can parse this information better if it's split up into multiple questions.

Good luck!

We wish you the best of luck in your first hours and days with us at [company]. Know that we're glad to have you on board, and that we look forward to getting to know you better. Still have questions? Feel free to reach out to [\[person\]](#), our Director of Operations, or directly to [\[person\]](#), our CEO.

[company] Contractor Quick Start Guide

EDITED

Welcome

Hello, and welcome! This is a quick start guide to contracting with [company]. Our goal is to get you up and running quickly, and to anticipate and answer any questions you may have before getting started.

We'd like you to learn more about us; check out info on [who we are and what we do](#) and [our company culture and values](#).

We'd like to work with you! What's next?

- We'll need to run a Goodhire background check.
- Once the background check is clear 🙌, you'll need to:
 - Fill out a [company] independent contractor agreement and a W9
 - Set up an account in Gusto (our payroll software) so we can pay you
- We'll also get you set up with:
 - Your new [company].com email address
 - Other accounts for software we use, such as:
 - Jira (dev tickets)
 - Asana (task tracking)
 - Slack (communication)
 - Harvest (time tracking)
 - 1Password (password management)
 - Gitlab (dev)
 - and more, depending on role
- Sorry, you won't be provided any hardware or peripheral accessories. However, we do have a [company] [account with Apple](#), so you can get a small discount
- Once your accounts are set up:
 - We'll send you a **Know Your Team** ice breaker [by email](#). Once you fill it out, it will be emailed to the rest of the team so they can learn about you (and you can see their answers as well)
 - Log in to Slack and say hi! 🙌

Commented [27]: link to Apple store

Commented [28]: adding this detail explains it better

Contractor FAQ

Hopefully this section will cover questions you have about starting work with [company]. However, rest assured that someone will talk you through our processes in more detail before you dive into your work.

Time Tracking and Payment Questions

- **Where do I track my time?**

We use the Harvest app to track all time. Please track your time in real time, as you're working on projects. Harvest has both desktop and mobile apps, and timers can also be started from tickets in Jira (for devs) as well as tasks in Asana (non-devs).

- **How do I know which projects or tasks I should track time to?**

Your team lead will let you know which projects, tasks or categories you should be tracking time to. If you have questions about logging your time, ask Dani!

- **How often do I submit my timesheet?**

Submit your timesheet at the end of each week. We can't pay you unless you do.

- **How often should I invoice?**

In addition to submitting your timesheet each week, we also need you to send us an invoice. You can do it in whatever cadence works best for you: semi-monthly, bi-weekly, weekly...just invoice us. We ask that you invoice us *at least* monthly.

- **Where should I send my invoice?**

Email your invoice to [billing@\[company\].com](mailto:billing@[company].com).

- **When/how do I get paid?**

Payment is made via direct deposit through Gusto, and you'll typically see that money in your bank account within five business days from when you invoice.

Everyday Work Questions

- **What hours should I keep?**

Commented [29]: as a contractor, this is information that is most important

Commented [30]: and it is easier to parse having the questions separated.

Commented [31]: this part is important to spell out, otherwise they might think they can just submit the timesheet and get paid.

Since you're a contractor, this is up to you! But we prefer that you're somewhat reachable during regular business hours, which are Monday to Friday, 9am to 5pm CST.

- **What kind of project or ticket management system do you use?**

For the most part, we use Jira for technical work and Asana for non-technical work. We have a ticketing system in Jira, so that tickets can be assigned to you and you can change the status as you work on something. Someone will walk you through how to use Jira in more detail, before you start.

- **What communication tools do you use?**

Slack is our primary tool for communicating with each other (and sometimes with clients), and we use Zoom for meetings. We expect that you'll have Slack open throughout the day and set up your notifications, so we can resolve questions and conversations as quickly as possible. Sometimes it's more efficient to have an impromptu Zoom call with each other, so we'll do that. We use email sparingly, and mostly with clients.

- **How does the #attendance Slack channel work?**

We use the #attendance Slack channel kinda like we'd say "hello" and "goodbye" as we come and go from a "regular" office. We ask that you let everyone know when you start work for the day, when you'll be away from your computer, and when you're done for the day. In addition to the channel, we update our Slack status regularly to indicate where we're at: out, focused, etc. We've standardized on five statii (Out, Away, Here, Meeting and Trying to Focus) which are used almost universally by everyone, but feel free to be creative if you are doing something special.

- **What do I need to know about using Slack to communicate with clients?**

In addition to the internal Slack channels for client projects, we also have client-facing channels (their names include # t7care). Please be mindful of what you post in those client-facing channels. Although, don't be too wary; we trust you to post in those channels when you need something from a client.

Commented [32]: again just adding a little more detail to explain that there are two sets of client/project channels

- **How should I use my [company] calendar? How should I indicate times I am busy for others to see?**

We ask that you somehow connect your personal calendar with your [company] calendar. However you do this is up to you! You can either share your personal

calendar but keep the events private, or you can manually add your personal calendar events to your [company] calendar. Our goal is to make sure we have your availability handy for meetings and project needs.

- **How do I notify [company] of time I'll be taking off?**

If you will be taking time off, we ask that you give us as much notice as possible, so we can plan accordingly. Please also add any time or days off on your [company] calendar, so we can plan meetings accordingly.

- **When do I use my [company] email address?**

Always do [company]'s business (for example, communicating with clients) with [company]'s email address. Also, please don't forward your email from your [company] account to any other email address. However, you probably won't send or receive a great deal of email, as we're mostly in Slack all day long.

Commented [33]: still sort of a strange question, like of course you're going to use your [company] email, why else give one if not to be used

Developer-Specific Questions

- **Do you have standups? Am I supposed to attend?**

Standups happen daily, at 9:30am CT. If you can attend, great! If not, that's ok too—as long as you're clear on your priorities each day.

- **Where does the code live?**

Most of the code you will work with will be in our own Gitlab server: gitlab.[company].com, to which you can get access by asking for it in the #developers Slack channel. We have clients that host with Pantheon, Acquia and platform.sh, so each will have their own setup.

- **How do I make changes?**

We use the [git flow](#) branching model, and use feature branches extensively. Your code will always be reviewed by another set of eyes before it goes live. And we expect that you will spend time reviewing code from others as well. This is how we all learn!

- **How do I get my code live?**

Getting your code live is usually a mix of finishing a feature branch, pushing the code into the develop branch, and then doing a release to the main branch. You probably won't be responsible for doing releases to main.

Miscellaneous Questions

- **When is [company] closed?**

[company] is closed every year on New Year's Eve + Day, Memorial Day, Independence Day, Labor Day, Thanksgiving + Black Friday, and Christmas Eve + Day.

- **Does [company] have a Brand and House Style Guide?**

Why yes, we do! Here's the [\[company\] House Style Guide](#).

- **What is [company]'s contact information?**

- Call us: [phone]
- Email us: [hi@\[company\].com](mailto:hi@[company].com)
- Send us a postcard: [company], [address]
- Visit our website: [https:// \[company\].com/](https://[company].com/)
- Follow us on Twitter: [https://twitter.com/\[company\]](https://twitter.com/[company])

Good luck!

We wish you the best of luck in your first hours and days with us at [company]. Know that we're glad to have you on board, and that we look forward to getting to know you better. Still have questions? Feel free to reach out to [\[person\]](#), our Director of Operations, or directly to [\[person\]](#), our CEO.