



LVL UP PERFORMANCE
EMPLOYEE ONBOARDING GUIDE

THREE SIMPLE PATHS

Three ways to onboard your employees.

Choose the path that matches your team today. Use the other two whenever the situation calls for them.

01

Quick invite

Small teams

02

Spreadsheet

10+ employees

03

Add individually

Detailed setup

Nothing is emailed until the company reviews the employee list and launches the workspace.

Choose the easiest starting point

All three methods create the same team directory. The difference is how much information you enter up front.

01

Quick invite

BEST FOR A SMALL TEAM

Paste names and work emails. LVL Up prepares every invitation in one step.

- ✓ Fastest
- ✓ Minimal data
- ✓ Edit roles later

02

Import a spreadsheet

BEST FOR 10+ EMPLOYEES

Upload CSV or Excel. Common HR columns are recognized and mapped.

- ✓ Fast at scale
- ✓ More structure
- ✓ Template included

03

Add individually

BEST FOR DETAILED SETUP

Enter each employee's role, department, and manager before inviting.

- ✓ Most control
- ✓ Best for leaders
- ✓ Great for exceptions

OUR RECOMMENDATION

**Show all three. Pick one primary method.
Mix only when it helps.**

The launch review is the safety net: verify roles, managers, departments, and invite choices before sending.

METHOD 1

Quick invite

Paste names and emails, prepare the list, and move on. This is the fastest path for a small company.

BEST FOR A SMALL TEAM

Use this when speed matters more than complete employee profiles on day one.

1

Paste one employee per line.

2

Review names and work emails.

3

Prepare invitations, then continue to launch review.

GOOD TO KNOW

Quick invite keeps setup light. You can assign departments, managers, and elevated roles after the list is prepared.

QUICK INVITE

Paste your employee list

One person per line. Names are optional.

```
1  alex@company.com  
2  Jordan Lee <jordan@company.com>  
3  Taylor, taylor@company.com
```

Everyone starts as an employee. Edit roles afterward.

PREPARE INVITATIONS

Import a spreadsheet

Bring in a larger team without retyping employee data. CSV, XLSX, and XLS files are supported.

BEST FOR 10+ EMPLOYEES

Use the company export you already have, or start with the LVL Up template.

1

Choose the spreadsheet file.

2

Confirm automatic column matches.

3

Review departments and manager relationships.

4

Fix exceptions before launch.

PRIVACY NOTE

During onboarding, the file is processed for setup and is not stored as an attachment.

SPREADSHEET IMPORT

Upload your employee spreadsheet

UPLOAD

Choose a CSV or Excel file

Email required. Names, departments, and manager emails are matched when present.

FIRST NAME	WORK EMAIL	DEPARTMENT	MANAGER
Jordan	jordan@...	Operations	alex@...
MATCHED	MATCHED	MATCHED	MATCHED

Add individually

Enter complete details for one person at a time. This path gives the company maximum control before launch.

BEST FOR DETAILED SETUP

Use this for executives, managers, special access roles, and small teams with complex reporting.

1

Add name and work email.

2

Choose the correct access role.

3

Assign department and manager.

4

Save, then repeat as needed.

BEST MIXED-METHOD USE

Import the main team by spreadsheet, then add leaders or special cases individually.

ADD INDIVIDUALLY

Add complete employee details

First name

Jordan

Last name

Lee

Work email *

jordan@company.com

Access role

Employee

Department

Operations

Reports to

Alex Morgan

ADD EMPLOYEE

Use one, two, or all three

The methods are not competing workflows. They are three entrances to the same employee directory.

WHICH PATH SHOULD I USE?



Fewer than 10, mostly emails?

Quick invite



10+ people or existing HR data?

Spreadsheet



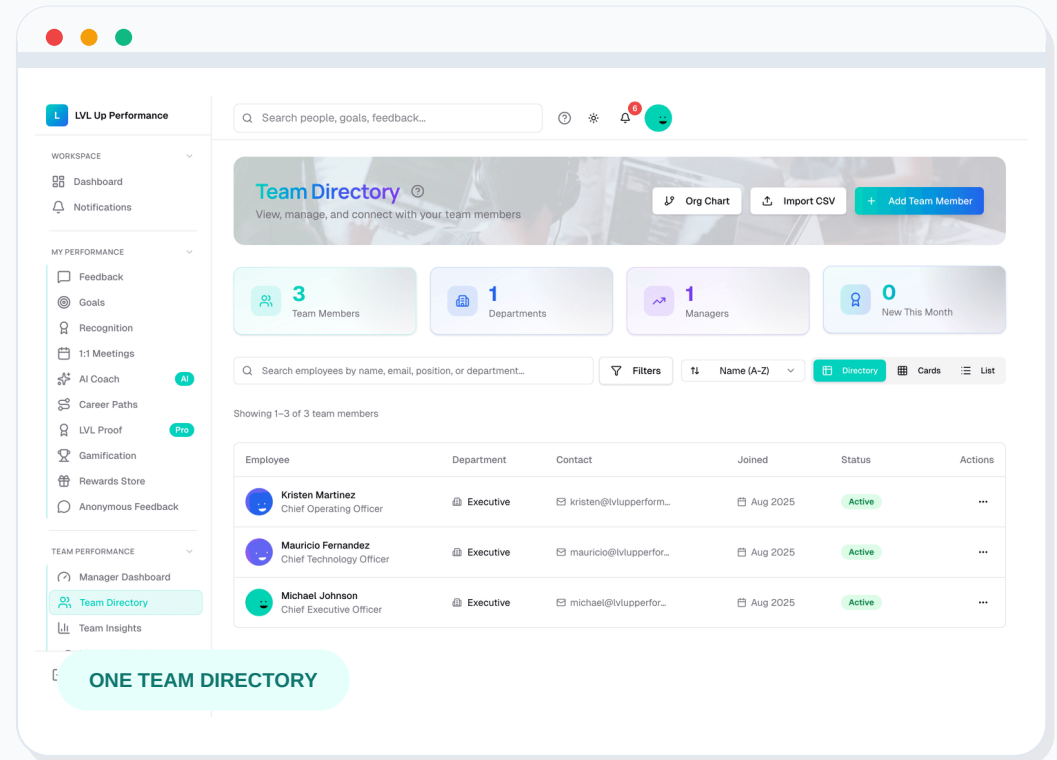
Precise role and reporting setup?

Add individually



Mixed or uneven data?

Combine the methods



[OPEN DOCUMENTATION](#)

Questions? support@lvlupperformance.com

THE SAFE LAUNCH RULE

Review everyone before invitations go out.

Confirm email, role, department, manager, and invite selection. Then launch the workspace.