New Hire Integration Checklist

Welcome aboard! To ensure you have a terrific start on our team, we have prepared an outline of items that will help you get settled during your first couple of weeks with us.

This checklist has been created for: NEW HIRE NAME HERE, TITLE

**Getting Settled**

* I’ve met the other members of my team
* I have my workspace and will settle in with personal effects
* I have a phone that is operational
* My phone number is “phone number”
* I have learned basic features like hold, call forward, and call transfer
* My PC is set up and I have my access/log-in details
* My main access/log-in details here – keep this secure
* The printer set up is organized and ready to go
* I’ve read the firm procedures on Computer Use at Work
* I know how to access the team shared drive at “http:/shared/drive”
* I know where to find basic office supplies and/or who to ask for them
* I know where the lunchroom and other important facilities are in the office
* I’ve met the other people at the branch
* I have information about parking

**Human Resources**

* I have reviewed & understand my Job Description
* I have completed & submitted my HR Documentation
* I have reviewed the HR Policies & Procedures
* I have provided all licensing information to HR
* I understand my CE requirements for the next 12 months
* If I have questions regarding HR, the team member I speak to is this person
* If I have questions regarding HR, the firm representative I speak to is this person

**Software**

**Outlook**

* My email is set up and working properly
* My email address is “email address”
* My email signature is set up according to team branding standards
* My standard email font is set up according to team branding standards
* I know where to find online support & resources
* I have signed up for an online tutorial and/or webinar:
* If I need more information, contact: name/number/email address

**Word/Excel/Power Point**

* I have access and it works properly
* I know where to find online support & resources
* I have signed up for an online tutorial and/or webinar:
* If I need more information, contact: name/number/email address

**Contact Management Software**

* I have access and it works properly
* I know where to find online support & resources
* I have signed up for an online tutorial and/or webinar:
* If I need more information, contact: name/number/email address

**Portfolio & Account Software**

* I have access and it works properly
* I know where to find online support & resources
* I have signed up for an online tutorial and/or webinar:
* If I need more information, contact: name/number/email address

**Other Software Programs**

* I have access and it works properly
* I know where to find online support & resources
* I have signed up for an online tutorial and/or webinar:
* If I need more information, contact: name/number/email address

**About Our Advisory Practice**

* I’ve reviewed a copy of the Website at “www.here.com”
* I’ve reviewed a copy of the Introduction Kit
* I’ve reviewed a copy of the Organization & Structure
* I’ve reviewed a copy of the Procedures Manual
* I’ve reviewed a copy of the Weekly Team Meeting Agenda
* I’ve blocked off the Weekly Team Meeting on my calendar going forward

**Team & Firm Communication Policies**

* I’ve reviewed the firm Policy on Email
* I’ve reviewed the Telephone Script to Answer the Phone
* I’ve reviewed the Policy on Incoming and Outgoing Mail
* I’ve reviewed the Policy on Incoming and Outgoing Courier
* I’ve received my business cards

**Add Job Description Items/List Here**