

1st Day Welcome Orientation Checklist

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| <input type="checkbox"/> Add Organization on FB/LinkedIn page as new place of employment. Make a post about your first day. | <input type="checkbox"/> Review Organization Resources for Training, Accountability |
| <input type="checkbox"/> Confirm Calendar Shared with rest of team/ appropriate members/ clients | <input type="checkbox"/> Review Parking & Transportation options |
| <input type="checkbox"/> Finalize Employment / Independent Contractor Agreement, non-compete/disclose & onboarding paperwork | <input type="checkbox"/> Review Restroom, Lunchroom, Discuss local delivery places & restaurants |
| <input type="checkbox"/> Find Copy Center/Printer Area | <input type="checkbox"/> Review Sick Day Policies & Procedures |
| <input type="checkbox"/> Find Workspace | <input type="checkbox"/> Review Where to Get supplies |
| <input type="checkbox"/> Find Manager/Staff Desks | <input type="checkbox"/> Review & Explain the "First Quarter Checkmark" |
| <input type="checkbox"/> Get set up on CRM, dialer, technology | <input type="checkbox"/> Review & Explain the "Leverage Training Curve" |
| <input type="checkbox"/> Give Map of Facility and Parking Area | <input type="checkbox"/> Schedule 60 mins with manager to go over client greeting & Expectations |
| <input type="checkbox"/> Give Map of Local Transportation, Lunch, Child Care, etc. | <input type="checkbox"/> Schedule 60 mins with manager to go over Presentation templates |
| <input type="checkbox"/> Introduce to team – attend organization team meeting | <input type="checkbox"/> Schedule CRM Training |
| <input type="checkbox"/> Like Organization Business Page on FB / Twitter / Pinterest / LinkedIn | <input type="checkbox"/> Schedule Daily Script Test Review Talk and Daily Review Meeting for first week/month |
| <input type="checkbox"/> Meet All staff, exchange contact information where appropriate | <input type="checkbox"/> Schedule Photo Shoot for headshot |
| <input type="checkbox"/> Office tour with manager | <input type="checkbox"/> Schedule Team Lunch |
| <input type="checkbox"/> Order/Receive Keys, key card, Business Cards | <input type="checkbox"/> Schedule technology training with manager/trainer to debrief what you will be using |
| <input type="checkbox"/> Review Company Mission Statement/Story/Traditions | <input type="checkbox"/> Schedule Tracking Training with Staff: regarding CRM, Script Review, etc. |
| <input type="checkbox"/> Review Dress Code | <input type="checkbox"/> Schedule Weekly Coaching / Accountability Session |
| <input type="checkbox"/> Review Emergency Procedures | <input type="checkbox"/> Send Bio/Photo to Administrative staff to add to Websites |
| <input type="checkbox"/> Review Guest & Visitor Policy | <input type="checkbox"/> Set up cell phone voicemail with Organization approved greeting |
| <input type="checkbox"/> Review Holidays & Leave of Absences | <input type="checkbox"/> Set up e-mail; sync with cell phone |
| <input type="checkbox"/> Set up wireless access to Wi-Fi and copier/printer | <input type="checkbox"/> Sign off on Expectations paperwork |
| <input type="checkbox"/> Review Internet Usage Policy | |