Dear «Salutation»,

Welcome to the Growth Partners team!

We’re glad you’re here.

This document outlines your induction plan and will help you get up to speed in your new role as.

For starters, you will find some useful information on the following:

* Your First Week
* The Way We Work
* Team Structure
* Key Deliverables
* Some Guiding Thoughts
* Monitoring Progress

You will also find some resources to help you start learning about all things ‘Growth Partners’.

Please reach out if you have any questions!

Regards,

«EmployeeManager»

Manager

**Getting Started**

**Meeting the team**

As part of your induction, the following meetings will be scheduled over your first two weeks:

* Welcome to Growth Partners – intro to our practice («EmployeeManager» & «EmployeePartner»)
* Intro to our processes & team – meet the team and learn how we work («EmployeeManager»)
* Meet your portfolio – we'll introduce you to your client base («EmployeeManager»)

**The Way we Work**

You should already have the necessary set-up information for finance, hardware, software and the various tools we use as a team. If not, please ask!

To get you started we use:

* Microsoft Team for internal communication
* FYI for document, job and client management
* Xero for Tax and client data

Some useful tips:

1. It's a good idea to review your Teams notifications to ensure you get alerts on chats and priority channels
2. Use comments on emails/documents in FYI rather than forwarding emails
3. Save your work to FYI wherever possible

**Your Key Deliverables**

The key deliverables for your first 6 weeks should have already been agreed and documents in your Position Description.

If not speak to your manager to make sure expectation are clear from the outset.

**Some Guiding Thoughts**

Here are a few tips for your first 90 days:

**Take time to learn:**

We’d love you to hit the ground running, but please make sure you schedule in time to learn how things work. Use your first 30 days to get to know our systems and processes and become proficient using the various applications.

**Get to know the team:**

Help when you need it from a great team, be sure to introduce yourself and get to know the team you’ll be working with.

**Get to know your clients:**

It’s important that you spend the time to understand your clients, familiarise yourself with their file and details so you can help them into the future for their needs and requirements.

**Don’t be afraid to ask:**

No one expects you to know how things work right away, take advantage of that and ask for help when you need it.

**Monitoring Progress**

Manager will check-in with you regularly to ensure that you are on track.

Initial review meetings will be scheduled after your first 6 weeks and after your first 12 weeks, to ensure that you have settled into your role.

More formal reviews are conducted every six months, and are an opportunity to provide feedback, to discuss what ahs gone well, what could be improved, where you may need help and to re-align your focus for the period ahead.

**Our Team**

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**Useful Resources**