

## New Employee Induction Program - First Day Checklist

Employee Name: \_\_\_\_\_  
 Position: \_\_\_\_\_  
 Division / Area: \_\_\_\_\_

Induction Manager: \_\_\_\_\_  
 Induction Date: \_\_\_\_\_  
 Expected Duration: 1 Full Work Day

### Items to Cover / Induction Points

Inducted		Employee	Manager
Yes	No	Initials	Initials

#### Company Introduction & History:

- |   |                          |                          |       |       |
|---|--------------------------|--------------------------|-------|-------|
| 1./ Explain Corporate Structure   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 2./ Provide the <i>New Employee</i> a written document detailing the Registered Company Details, acceptable Trading Names, ABN, ACN, Contact Details, Directors Names & Contact Details, Officer in Effective Control Details & Trust Account Details | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 3./ Explain the History of the Company & the motivation by the Founders to set the Company Up (was it created and grown organically, or a re-brand or created through Acquisition)  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 4./ Explain the Company Brand - Branding Guidelines, Mission, Values, Core Principles   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 5./ If the business is part of a Franchise or Marketing group, then detail the association with the brand, noting any Franchise Guidelines  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 6./ Explain the Company Services  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 7./ Provide an overview of any Ancillary Services offered to the Customers  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 8./ Explain the Company Points of Difference, Pricing Strategy, Level of Service, Fee Schedules, Minimum Benchmarks   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 9./ Detail the Client Avatar, Demographic of the Properties, Vendors, RRP's, Renters - the Client target market, and geographic boundaries (if any) with regards to marketing & listing properties (especially if part of a Franchise)                | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |

#### Team Introduction / Roles & Responsibilities:

- |   |                          |                          |       |       |
|---|--------------------------|--------------------------|-------|-------|
| 10./ If available, provide the <i>New Employee</i> with a copy of the Staff / Team Organisation Chart with names, division & roles of each of the Team Members  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 11./ Introduce the <i>New Employee</i> to each person throughout the Company, with a brief explanation of the person's role, how long they have been with the Company, their phone extension, their mobile & email, their internet profile and also how their role could / would interact with the <i>New Employee's</i> role | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 12./ Make a note on the Induction Notes of any Staff that are absent or not working on that day, and ensure that the <i>New Employee</i> is introduced to them upon their return  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 13./ Use some examples of specific triggers, and then explain who the <i>New Employee</i> would need to speak with, and the best method, for example:   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| a./ if the <i>New Employee</i> is running late, or sick - who do they speak with, and the best method of communication;   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| b./ if the <i>New Employee</i> receives a Complaint / Dispute from a Customer, Member of the Public, etc. - What happens, explain the Dispute Resolution Process;   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| c./ the process for effectively managing new business leads / inquiries - who handles the leads, is there a Company process or form that is required to be followed, what initial information is required to be passed on;  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| d./ if the <i>New Employee</i> has an issue with another Team Member, or has noticed a possible process / system / policy that is not being followed correctly - how should this be managed, and with whom?   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| e./ if there is a potential risk identified within the business, either a physical risk (such as slip hazards, electrical faults, water leaks, etc.), or a Commercial Risk such as a Breach of an Act by a Staff Member that could put the Agency at risk, how is this to be managed and by whom?                             | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |

Items to Cover / Induction Points	Inducted		Employee	Manager
	Yes	No	Initials	Initials
<b>Office Walk Through / Working Area:</b>				
14./ Office Hours & Expectation for attendance - provide the <i>New Employee</i> with the office hours, however also discuss the expectation of working hours, daily arrival times, accepted finishing times, lunch breaks, personal appointments during the day, flexible working time away from the office, and expectation to responding to work calls outside of office hours, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
15./ Presentation & Culture - each office is unique. Discuss the Company expectation for all Staff presentation including dress standards, personal hygiene, make-up, piercing's, tattoos, excessive perfume / aftershave, etc. Explain & Discuss the office dynamics & culture - i.e. taking mobile calls whilst walking through the office, or swearing in the office, or yelling from one desk to another over the top of other Staff, sharing jokes through email, or distracting other Staff whilst they are working, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
16./ Office Walk Through - physical walk through of the Office Layout & Facilities - i.e. bathroom facilities, kitchen, change rooms / lockers, stationery, IT room, lifts, swipes, meeting rooms (including Monitor set up & passwords)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
17./ Smoking in or around the building - if the office is a NON Smoking environment, then explain this to the <i>New Employee</i> , along with what "IS & IS NOT" permitted with respect to breaks for smoking, where it is permissible to take these smoking breaks and where it is not - i.e. at the front of the office, in uniform. Discuss the policy for Company Vehicles	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
18./ Parking & Public Transport - if a designated Parking spot is provided, then arrange access codes, swipes, etc. - Explain open / close hours for secure environment, discuss where the <i>New Employee</i> can & cannot park. If parking is not provided, discuss Public Parking options, and or the best Public Transport options. Work with the <i>New Employee</i> to ensure they are comfortable with the best methods to get to work and parking	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
19./ OH&S Induction - if there is a designated Fire Warden, ensure to introduce the <i>New Employee</i> to them, or if there is a designated OH&S Delegate. Explain what the <i>New Employee</i> should do if they become aware of a potential Physical OH&S Risk in the office	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
20./ Emergency procedures - discuss out of office safety procedures, especially for offsite meetings, open for inspections, key management when out of office, personal safety when in and out of the office, panic alert alarms in the office / Reception (if set up) - some offices have check in policies for all Staff that leave the office for late appointments, or Panic Code words - discuss if applicable	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
21./ Evacuation procedures & Fire Safety - show the <i>New Employee</i> where all the fire extinguishers / fire blankets are stored - explain what each extinguisher is to be used for (AND NOT USED FOR). Then show them the Fire Evacuation plan, where the meeting point is, what to do in the event of an "Actual Fire"	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
22./ First Aid - show the <i>New Employee</i> the location and contents of the First Aid supplies. Explain to them their access to the contents, especially if an incident report is required to be completed, and whom to contact if supplies need to be restocked	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Desk Set-up / Workstation:</b>				
23./ Cover working area - desk or office set up / power points, extension boards & chargers / Wi-Fi passwords, stationery supplies	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
24./ Discuss if there are policies around the desk cleanliness, if there are policies around eating at the desk, personal photos, and storage of coats, bags & personal belongings, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

Items to Cover / Induction Points	Inducted		Employee Initials	Manager Initials
	Yes	No		
<b>Computer Profile &amp; Software Subscriptions:</b>				
25./ Software Profile & Passwords (for Desktop & or Laptop)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
26./ Office subscriptions - profile - passwords - PM or Sales Trust Software, Database, Inspection software, Real Estate Advertising portals, Zoom Profile, Snagit Profile, Loom Profile, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
27./ Review & assess the competency of the <i>New Employee</i> for each software / program. If required (set aside future training time in their diary) for Software Induction Tutorials, onsite training, webinars, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Outlook / Calendars / Trello / Slack / Teams:</b>				
28./ Ensure the Email Profile is set up correctly, and include the <i>New Employee's</i> email into any Division Email Groups (PM, Admin, Sales, etc)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
29./ Create the out of office Email Signature - explain to the <i>New Employee</i> when this is required, especially during personal & annual leave, show them how to make changes	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
30./ Ensure that the Calendar is shared with other members that require access - explain that ALL EMAILS are the property of the Company, and the <i>New Employee</i> CANNOT expect PRIVACY from emails sent or received through the Company Network	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
31./ <i>New Employee</i> Outlook Contact Card - it is advisable to set up the <i>New Employee's</i> Outlook Contact Card, including name (and any preferred salutation), title, email, office phone, extension, mobile phone, photo, and profile text - then share this with all other Team Members so that the new Staff Member will automatically appear in the phone and computer network for ALL Team Members across the Agency network	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
32./ Discuss the Company's email storage procedures and expectations. Explain if subfolders are to be created, or if emails are to be saved as notes in Trust Account software, etc. - Explain if there is an expectation that all current Inbox Emails are responded to & cleared daily, or responded to within a set timeframe, if there is a tagging / categorising system used	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
33./ If the office uses an internal messaging system (Skype, Team, Slack) - then it is important that the <i>New Employee</i> Profile is set up before the induction, and that they are included in any groups or team communications. Explain to the <i>New Employee</i> the expectations and standards of internal communications	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
34./ If applicable, ensure that the <i>New Employee's</i> email has been set up into any auto responders (such as Advertising Listings, Inspection apps, CRM) and linked to Trust Software emails - i.e. Property Me	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Team Meetings Pre-booked:</b>				
35./ Show examples of how to add appointments into the diary, especially open for Inspections (phone contacts, times, travel times, property addresses, Renter names, etc)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
36./ Show examples of Team meetings that new Staff needs to attend	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
37./ Pre-Book Appointments - the Calendar should be set up with pre-booked induction appointments, Staff meetings, Division meetings, Training days, Public Holidays, Scheduled office closed days (such as between Christmas & New Year if applicable), and at least 4 x 90-Day Action Plan meetings (1 hour) and 2 x 6 Month Performance Reviews (2-3 hours)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
38./ Explain the expectation of their Preparation & Contribution to each of the Meetings - Spend time with the <i>New Employee</i> to discuss the meetings that are pre-booked, including their role in each meeting, and what the expectation is of their participation in each of the meetings (i.e. do they need to prepare data / reports / stats in advance)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
39./ Provide the <i>New Employee</i> with a copy of any meeting Agenda's, sample 90-Day Action plan Agenda, Staff Performance Review Agenda	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

Items to Cover / Induction Points	Inducted		Employee Initials	Manager Initials
	Yes	No		
<b>Review Server Directory:</b> <i>(Detailed Computer Directory Induction Required)</i>				
40./ Discuss which drive the <i>New Employee</i> is to work within	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
41./ Explain the Methodology behind the Directory Hierarchy and File Structure	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
42./ Discuss the Forms & Checklists location	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
43./ Discuss the Letters & Templates location	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
44./ Explain to the Version Control & File Naming Protocols	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
45./ Detailed review of Trello Boards / Training Directory	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
46./ Discuss the “ <i>Staff How To’s</i> ” folder (Operational Guidelines)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Stationery / Business Cards:</b>				
47./ Discuss how to order business cards and stationery, and where stationery is stored, and who to contact for replacement of stock	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
48./ Ensure that there is adequate stationery and equipment (preferably new) on the desk for the first day - pens, calculator, hole punch, staplers, paper clips, sticky notes, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Office Equipment:</b> <i>(would suggest creating 1 Loom Training Video for each category)</i>				
<b>Note: It is advisable to set these features up PRIOR to the induction day to eliminate any downtime, so the New Employee is operational from day 1</b>				
<b>49./ Office Phone System</b>				
a./ Explain how to make internal transfers, placing callers on hold, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
b./ Explain how to dial out to make an external call	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
c./ Demonstrate setting up of voicemail & record their office voicemail	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
d./ Explain where the internal phone directory is and how to use it	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
e./ Ensure that ALL other Team Members Number Directory has been updated to include the <i>New Employee’s</i> extension	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>50./ Copier / Scanner / Multifunction</b>				
a./ Explain which printer to use for letters / artwork / general documents	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
b./ Explain how the quick menu works on the printer / copier (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
c./ Set the <i>New Employee</i> up on the printer & scanner, then demonstrate how to copy and scan from Desktop and to Desktop (and Laptop if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

Items to Cover / Induction Points	Inducted		Employee Initials	Manager Initials
	Yes	No		
<b>51./ Laptop (if applicable)</b>				
a./ Ensure the laptop is set up "Prior" to the first-day induction, and is set up to Wi-Fi, Office Network, Printers, Scanners, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
b./ Ask the <i>New Employee</i> to go through some basic functions on the laptop, especially if they are unfamiliar with this style of laptop - run through Shortcut Features, and provide links to Tutorials & Training if needed	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
c./ Ensure the <i>New Employee</i> is familiar with the Laptop Policy. Provide them a copy on the day with the aim to have it signed & returned as soon as possible. Record serial numbers, brand, type, (maybe take photos) and record what equipment is provided - mouse, chargers, carry case, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>52./ Mobile Phones / Ipad (if applicable)</b>				
a./ Ensure the mobile is set up "Prior" to the first-day induction, and is set up to Wi-Fi, Office Network, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
b./ Set up the Voicemail message in accordance with the Company Guidelines - explain & discuss if there is an office protocol to change the message at busy times, or out of office times, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
c./ Ensure the <i>New Employee</i> is familiar with the Mobile Phone Policy. Provide them a copy on the day with the aim to have it signed & returned as soon as possible. Record serial numbers, brand, type, (maybe take photos) and record what equipment is provided - box, chargers, protective case, earphones, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
d./ Spend some time with the <i>New Employee</i> to pair their mobile phone to their vehicle (if applicable) or the Company vehicle	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
e./ Ensure the <i>New Employee's</i> mobile phone number has been shared with ALL other Team Members, and updated on any Team Phone Registers (Outlook Contact Card)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>53./ Cameras (if provided above &amp; beyond the phone camera)</b>				
a./ Set up the camera to the <i>New Employee's</i> computer profile, discuss & collect the Camera Policy	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Office Filing System &amp; Key Cabinets:</b>				
54./ Show location of filing cabinets, explain the filing system, and security of documents	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
55./ Explain how folders are categorised	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
56./ Discuss & Train - sample RRP File, Rental File, Sales File (physical & electronic)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
57./ Explain the Office Procedures for Key Management, both inside the office, and when keys are taken from the office, including by Staff or Trades / Suppliers	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
58./ Discuss the Archive Procedures within the office, and if needed show the <i>New Employee</i> the archive storage location, or discuss if it is offsite	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Corporate Photos &amp; Web Profile for Agency Website:</b>				
59./ Book appointment for taking a corporate photo for <i>New Employee</i>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
60./ If applicable, provide a questionnaire for the <i>New Employee</i> to complete their profile and to be uploaded into the Agency website	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
61./ Diarise the task to upload the <i>New Employee</i> to the Company website, including any current listings as soon as practicable	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

Items to Cover / Induction Points	Inducted		Employee Initials	Manager Initials
	Yes	No		
<b>Review Agency Website:</b>				
62./ Overview of Company website - who manages the site, how is it updated, how often is it updated, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
63./ Open each link and discuss - i.e. resources, sign-in areas, Owner / Renter Portals, request for appraisal, forms, maintenance, applications, blogs, videos, new business information, Team, about us, Resources for Owners / Renters / Vendors / Purchasers, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Review Current Listings:</b>				
64./ Explain how to load listings on the website, bulk uploader	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
65./ Explain the structure of Sales & Leasing Listings	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
66./ Open each of the current listings (Sales & Rentals) provide an overview on the properties, the advertising standards, and the Agents linked to the listings	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Review All Employment Documents to be Returned by Staff:</b>				
67./ Set the expectation PRIOR to the induction that the <i>New Employee</i> will return their Eligibility to Act, their Tax File Declaration, their Super Choice form, their Payroll & Emergency Contact details, along with a Policy Acknowledgement Acceptance Form, they should also provide their Valid Police Check & Qualifications (Agents Rep / License)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
68./ The Agency is to provide an original (and keep a copy) of the Authority to Perform Duties	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
69./ Run through, explain and provide copies (if they have not already been done) of the Employment Policies - recording it on the Employee Policy Acknowledgement Form	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Position Description:</b>				
70./ Review the Position Description & Schedule of Duties in detail - line by line, seek feedback from the <i>New Employee</i> as to their understanding and level of competency in the task / area - make notes, and create a strategy for further training	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
71./ Answer any questions the <i>New Employee</i> may have with their Position Description	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Review "New Employee Guide Booklet": (if applicable)</b>				
72./ Go through each point in "New Employee Guide Booklet"	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Virtual Teams / Outsourcing / Consultants: (if applicable)</b>				
73./ If the role interacts with, or relies upon Virtual Staff or Outsourced Staff, then make a formal introduction to the <i>New Employee</i> by Zoom / Teams, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
74./ Explain the role the VA Team plays, what tasks they undertake, who manages them, what is the best method to communicate with them, and how are tasks managed?	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
75./ Introduce the <i>New Employee</i> to any external Consultants, Contractors - explain the role they play, and what if any interaction there will be with them for their role	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____



## New Employee Induction Program - First Day Checklist

Employee Name: \_\_\_\_\_  
 Position: \_\_\_\_\_  
 Division / Area: \_\_\_\_\_

Induction Manager: \_\_\_\_\_  
 Induction Date: \_\_\_\_\_  
 Expected Duration: 1 Full Work Day

### Items to Cover / Induction Points

Inducted		Employee	Manager
Yes	No	Initials	Initials

#### Company Introduction & History:

- |   |                          |                          |       |       |
|---|--------------------------|--------------------------|-------|-------|
| 1./ Explain Corporate Structure   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 2./ Provide the <i>New Employee</i> a written document detailing the Registered Company Details, acceptable Trading Names, ABN, ACN, Contact Details, Directors Names & Contact Details, Officer in Effective Control Details & Trust Account Details | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 3./ Explain the History of the Company & the motivation by the Founders to set the Company Up (was it created and grown organically, or a re-brand or created through Acquisition)  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 4./ Explain the Company Brand - Branding Guidelines, Mission, Values, Core Principles   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 5./ If the business is part of a Franchise or Marketing group, then detail the association with the brand, noting any Franchise Guidelines  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 6./ Explain the Company Services  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 7./ Provide an overview of any Ancillary Services offered to the Customers  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 8./ Explain the Company Points of Difference, Pricing Strategy, Level of Service, Fee Schedules, Minimum Benchmarks   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 9./ Detail the Client Avatar, Demographic of the Properties, Vendors, RRP's, Renters - the Client target market, and geographic boundaries (if any) with regards to marketing & listing properties (especially if part of a Franchise)                | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |

#### Team Introduction / Roles & Responsibilities:

- |   |                          |                          |       |       |
|---|--------------------------|--------------------------|-------|-------|
| 10./ If available, provide the <i>New Employee</i> with a copy of the Staff / Team Organisation Chart with names, division & roles of each of the Team Members  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 11./ Introduce the <i>New Employee</i> to each person throughout the Company, with a brief explanation of the person's role, how long they have been with the Company, their phone extension, their mobile & email, their internet profile and also how their role could / would interact with the <i>New Employee's</i> role | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 12./ Make a note on the Induction Notes of any Staff that are absent or not working on that day, and ensure that the <i>New Employee</i> is introduced to them upon their return  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| 13./ Use some examples of specific triggers, and then explain who the <i>New Employee</i> would need to speak with, and the best method, for example:   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| a./ if the <i>New Employee</i> is running late, or sick - who do they speak with, and the best method of communication;   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| b./ if the <i>New Employee</i> receives a Complaint / Dispute from a Customer, Member of the Public, etc. - What happens, explain the Dispute Resolution Process;   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| c./ the process for effectively managing new business leads / inquiries - who handles the leads, is there a Company process or form that is required to be followed, what initial information is required to be passed on;  | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| d./ if the <i>New Employee</i> has an issue with another Team Member, or has noticed a possible process / system / policy that is not being followed correctly - how should this be managed, and with whom?   | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |
| e./ if there is a potential risk identified within the business, either a physical risk (such as slip hazards, electrical faults, water leaks, etc.), or a Commercial Risk such as a Breach of an Act by a Staff Member that could put the Agency at risk, how is this to be managed and by whom?                             | <input type="checkbox"/> | <input type="checkbox"/> | _____ | _____ |

Items to Cover / Induction Points	Inducted		Employee	Manager
	Yes	No	Initials	Initials
<b>Office Walk Through / Working Area:</b>				
14./ Office Hours & Expectation for attendance - provide the <i>New Employee</i> with the office hours, however also discuss the expectation of working hours, daily arrival times, accepted finishing times, lunch breaks, personal appointments during the day, flexible working time away from the office, and expectation to responding to work calls outside of office hours, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
15./ Presentation & Culture - each office is unique. Discuss the Company expectation for all Staff presentation including dress standards, personal hygiene, make-up, piercing's, tattoos, excessive perfume / aftershave, etc. Explain & Discuss the office dynamics & culture - i.e. taking mobile calls whilst walking through the office, or swearing in the office, or yelling from one desk to another over the top of other Staff, sharing jokes through email, or distracting other Staff whilst they are working, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
16./ Office Walk Through - physical walk through of the Office Layout & Facilities - i.e. bathroom facilities, kitchen, change rooms / lockers, stationery, IT room, lifts, swipes, meeting rooms (including Monitor set up & passwords)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
17./ Smoking in or around the building - if the office is a NON Smoking environment, then explain this to the <i>New Employee</i> , along with what "IS & IS NOT" permitted with respect to breaks for smoking, where it is permissible to take these smoking breaks and where it is not - i.e. at the front of the office, in uniform. Discuss the policy for Company Vehicles	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
18./ Parking & Public Transport - if a designated Parking spot is provided, then arrange access codes, swipes, etc. - Explain open / close hours for secure environment, discuss where the <i>New Employee</i> can & cannot park. If parking is not provided, discuss Public Parking options, and or the best Public Transport options. Work with the <i>New Employee</i> to ensure they are comfortable with the best methods to get to work and parking	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
19./ OH&S Induction - if there is a designated Fire Warden, ensure to introduce the <i>New Employee</i> to them, or if there is a designated OH&S Delegate. Explain what the <i>New Employee</i> should do if they become aware of a potential Physical OH&S Risk in the office	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
20./ Emergency procedures - discuss out of office safety procedures, especially for offsite meetings, open for inspections, key management when out of office, personal safety when in and out of the office, panic alert alarms in the office / Reception (if set up) - some offices have check in policies for all Staff that leave the office for late appointments, or Panic Code words - discuss if applicable	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
21./ Evacuation procedures & Fire Safety - show the <i>New Employee</i> where all the fire extinguishers / fire blankets are stored - explain what each extinguisher is to be used for (AND NOT USED FOR). Then show them the Fire Evacuation plan, where the meeting point is, what to do in the event of an "Actual Fire"	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
22./ First Aid - show the <i>New Employee</i> the location and contents of the First Aid supplies. Explain to them their access to the contents, especially if an incident report is required to be completed, and whom to contact if supplies need to be restocked	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Desk Set-up / Workstation:</b>				
23./ Cover working area - desk or office set up / power points, extension boards & chargers / Wi-Fi passwords, stationery supplies	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
24./ Discuss if there are policies around the desk cleanliness, if there are policies around eating at the desk, personal photos, and storage of coats, bags & personal belongings, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

Items to Cover / Induction Points	Inducted		Employee	Manager
	Yes	No	Initials	Initials
<b>Computer Profile &amp; Software Subscriptions:</b>				
25./ Software Profile & Passwords (for Desktop & or Laptop)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
26./ Office subscriptions - profile - passwords - PM or Sales Trust Software, Database, Inspection software, Real Estate Advertising portals, Zoom Profile, Snagit Profile, Loom Profile, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
27./ Review & assess the competency of the <i>New Employee</i> for each software / program. If required (set aside future training time in their diary) for Software Induction Tutorials, onsite training, webinars, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Outlook / Calendars / Trello / Slack / Teams:</b>				
28./ Ensure the Email Profile is set up correctly, and include the <i>New Employee's</i> email into any Division Email Groups (PM, Admin, Sales, etc)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
29./ Create the out of office Email Signature - explain to the <i>New Employee</i> when this is required, especially during personal & annual leave, show them how to make changes	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
30./ Ensure that the Calendar is shared with other members that require access - explain that ALL EMAILS are the property of the Company, and the <i>New Employee</i> CANNOT expect PRIVACY from emails sent or received through the Company Network	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
31./ <i>New Employee</i> Outlook Contact Card - it is advisable to set up the <i>New Employee's</i> Outlook Contact Card, including name (and any preferred salutation), title, email, office phone, extension, mobile phone, photo, and profile text - then share this with all other Team Members so that the new Staff Member will automatically appear in the phone and computer network for ALL Team Members across the Agency network	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
32./ Discuss the Company's email storage procedures and expectations. Explain if subfolders are to be created, or if emails are to be saved as notes in Trust Account software, etc. - Explain if there is an expectation that all current Inbox Emails are responded to & cleared daily, or responded to within a set timeframe, if there is a tagging / categorising system used	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
33./ If the office uses an internal messaging system (Skype, Team, Slack) - then it is important that the <i>New Employee</i> Profile is set up before the induction, and that they are included in any groups or team communications. Explain to the <i>New Employee</i> the expectations and standards of internal communications	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
34./ If applicable, ensure that the <i>New Employee's</i> email has been set up into any auto responders (such as Advertising Listings, Inspection apps, CRM) and linked to Trust Software emails - i.e. Property Me	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Team Meetings Pre-booked:</b>				
35./ Show examples of how to add appointments into the diary, especially open for Inspections (phone contacts, times, travel times, property addresses, Renter names, etc)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
36./ Show examples of Team meetings that new Staff needs to attend	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
37./ Pre-Book Appointments - the Calendar should be set up with pre-booked induction appointments, Staff meetings, Division meetings, Training days, Public Holidays, Scheduled office closed days (such as between Christmas & New Year if applicable), and at least 4 x 90-Day Action Plan meetings (1 hour) and 2 x 6 Month Performance Reviews (2-3 hours)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
38./ Explain the expectation of their Preparation & Contribution to each of the Meetings - Spend time with the <i>New Employee</i> to discuss the meetings that are pre-booked, including their role in each meeting, and what the expectation is of their participation in each of the meetings (i.e. do they need to prepare data / reports / stats in advance)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
39./ Provide the <i>New Employee</i> with a copy of any meeting Agenda's, sample 90-Day Action plan Agenda, Staff Performance Review Agenda	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

Items to Cover / Induction Points	Inducted		Employee Initials	Manager Initials
	Yes	No		
<b>Review Server Directory:</b> <i>(Detailed Computer Directory Induction Required)</i>				
40./ Discuss which drive the <i>New Employee</i> is to work within	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
41./ Explain the Methodology behind the Directory Hierarchy and File Structure	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
42./ Discuss the Forms & Checklists location	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
43./ Discuss the Letters & Templates location	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
44./ Explain to the Version Control & File Naming Protocols	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
45./ Detailed review of Trello Boards / Training Directory	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
46./ Discuss the “ <i>Staff How To’s</i> ” folder (Operational Guidelines)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Stationery / Business Cards:</b>				
47./ Discuss how to order business cards and stationery, and where stationery is stored, and who to contact for replacement of stock	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
48./ Ensure that there is adequate stationery and equipment (preferably new) on the desk for the first day - pens, calculator, hole punch, staplers, paper clips, sticky notes, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Office Equipment:</b> <i>(would suggest creating 1 Loom Training Video for each category)</i>				
<b>Note: It is advisable to set these features up PRIOR to the induction day to eliminate any downtime, so the New Employee is operational from day 1</b>				
<b>49./ Office Phone System</b>				
a./ Explain how to make internal transfers, placing callers on hold, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
b./ Explain how to dial out to make an external call	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
c./ Demonstrate setting up of voicemail & record their office voicemail	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
d./ Explain where the internal phone directory is and how to use it	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
e./ Ensure that ALL other Team Members Number Directory has been updated to include the <i>New Employee’s</i> extension	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>50./ Copier / Scanner / Multifunction</b>				
a./ Explain which printer to use for letters / artwork / general documents	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
b./ Explain how the quick menu works on the printer / copier (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
c./ Set the <i>New Employee</i> up on the printer & scanner, then demonstrate how to copy and scan from Desktop and to Desktop (and Laptop if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

Items to Cover / Induction Points	Inducted		Employee	Manager
	Yes	No	Initials	Initials
<b>51./ Laptop (if applicable)</b>				
a./ Ensure the laptop is set up "Prior" to the first-day induction, and is set up to Wi-Fi, Office Network, Printers, Scanners, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
b./ Ask the <i>New Employee</i> to go through some basic functions on the laptop, especially if they are unfamiliar with this style of laptop - run through Shortcut Features, and provide links to Tutorials & Training if needed	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
c./ Ensure the <i>New Employee</i> is familiar with the Laptop Policy. Provide them a copy on the day with the aim to have it signed & returned as soon as possible. Record serial numbers, brand, type, (maybe take photos) and record what equipment is provided - mouse, chargers, carry case, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>52./ Mobile Phones / Ipad (if applicable)</b>				
a./ Ensure the mobile is set up "Prior" to the first-day induction, and is set up to Wi-Fi, Office Network, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
b./ Set up the Voicemail message in accordance with the Company Guidelines - explain & discuss if there is an office protocol to change the message at busy times, or out of office times, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
c./ Ensure the <i>New Employee</i> is familiar with the Mobile Phone Policy. Provide them a copy on the day with the aim to have it signed & returned as soon as possible. Record serial numbers, brand, type, (maybe take photos) and record what equipment is provided - box, chargers, protective case, earphones, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
d./ Spend some time with the <i>New Employee</i> to pair their mobile phone to their vehicle (if applicable) or the Company vehicle	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
e./ Ensure the <i>New Employee's</i> mobile phone number has been shared with ALL other Team Members, and updated on any Team Phone Registers (Outlook Contact Card)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>53./ Cameras (if provided above &amp; beyond the phone camera)</b>				
a./ Set up the camera to the <i>New Employee's</i> computer profile, discuss & collect the Camera Policy	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Office Filing System &amp; Key Cabinets:</b>				
54./ Show location of filing cabinets, explain the filing system, and security of documents	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
55./ Explain how folders are categorised	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
56./ Discuss & Train - sample RRP File, Rental File, Sales File (physical & electronic)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
57./ Explain the Office Procedures for Key Management, both inside the office, and when keys are taken from the office, including by Staff or Trades / Suppliers	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
58./ Discuss the Archive Procedures within the office, and if needed show the <i>New Employee</i> the archive storage location, or discuss if it is offsite	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Corporate Photos &amp; Web Profile for Agency Website:</b>				
59./ Book appointment for taking a corporate photo for <i>New Employee</i>	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
60./ If applicable, provide a questionnaire for the <i>New Employee</i> to complete their profile and to be uploaded into the Agency website	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
61./ Diarise the task to upload the <i>New Employee</i> to the Company website, including any current listings as soon as practicable	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

Items to Cover / Induction Points	Inducted		Employee	Manager
	Yes	No	Initials	Initials
<b>Review Agency Website:</b>				
62./ Overview of Company website - who manages the site, how is it updated, how often is it updated, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
63./ Open each link and discuss - i.e. resources, sign-in areas, Owner / Renter Portals, request for appraisal, forms, maintenance, applications, blogs, videos, new business information, Team, about us, Resources for Owners / Renters / Vendors / Purchasers, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Review Current Listings:</b>				
64./ Explain how to load listings on the website, bulk uploader	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
65./ Explain the structure of Sales & Leasing Listings	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
66./ Open each of the current listings (Sales & Rentals) provide an overview on the properties, the advertising standards, and the Agents linked to the listings	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Review All Employment Documents to be Returned by Staff:</b>				
67./ Set the expectation PRIOR to the induction that the <i>New Employee</i> will return their Eligibility to Act, their Tax File Declaration, their Super Choice form, their Payroll & Emergency Contact details, along with a Policy Acknowledgement Acceptance Form, they should also provide their Valid Police Check & Qualifications (Agents Rep / License)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
68./ The Agency is to provide an original (and keep a copy) of the Authority to Perform Duties	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
69./ Run through, explain and provide copies (if they have not already been done) of the Employment Policies - recording it on the Employee Policy Acknowledgement Form	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Position Description:</b>				
70./ Review the Position Description & Schedule of Duties in detail - line by line, seek feedback from the <i>New Employee</i> as to their understanding and level of competency in the task / area - make notes, and create a strategy for further training	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
71./ Answer any questions the <i>New Employee</i> may have with their Position Description	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Review "New Employee Guide Booklet": (if applicable)</b>				
72./ Go through each point in "New Employee Guide Booklet"	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
<b>Virtual Teams / Outsourcing / Consultants: (if applicable)</b>				
73./ If the role interacts with, or relies upon Virtual Staff or Outsourced Staff, then make a formal introduction to the <i>New Employee</i> by Zoom / Teams, etc	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
74./ Explain the role the VA Team plays, what tasks they undertake, who manages them, what is the best method to communicate with them, and how are tasks managed?	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
75./ Introduce the <i>New Employee</i> to any external Consultants, Contractors - explain the role they play, and what if any interaction there will be with them for their role	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

Items to Cover / Induction Points	Inducted		Employee	Manager
	Yes	No	Initials	Initials
<b>Company Vehicles:</b> <i>(if applicable)</i>				
76./ If there is a Company Vehicle provided as part of the role (either permanently or shared) - refer to the Vehicle Policy, and ensure that this is signed & returned PRIOR to the <i>New Employee</i> being given access to the vehicle	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
77./ Take the <i>New Employee</i> through the features of the vehicle, take them for a drive, take copies of Current License	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
78./ Explain the petrol procedures, and if there is a petrol card or reimbursement process	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
79./ If Log Books are required, then ensure this is discussed	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
80./ Highlight that the <i>New Employee</i> is responsible for Traffic Infringements, Parking Infringements (and potentially the insurance excess for damage)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____
81./ Pair the phone to the vehicle (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____

**Topics Discussed:**

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

- 1 copy given to Staff for their records
- 1 copy saved in Staff file

**Manager Name:** \_\_\_\_\_

**Employee Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Date:** \_\_\_\_\_