EMPLOYEE ONBOARDING PLAN – CHECKLIST

By: the onboarding team at Affinity Consulting Group LLC

<FIRM NAME>
NEW EMPLOYEE
ONBOARDING PLAN

- ❖ **DAY 1**
  - ➢ HUMAN RESOURCES
    - MEET THE TEAM - BREAKFAST MEETING
    - HR PAPERWORK
  - ➢ OFFICE MANAGEMENT
    - LOG INTO COMPUTER, ACCESS EMAIL
    - PHONE SYSTEM BASICS
  - ➢ MATTER MANAGEMENT
    - FINDING CONTACTS AND MATTERS
  - ➢ TIME, BILLING, AND ACCOUNTING
    - TIME ENTRY BASICS
  - ➢ DOCUMENT MANAGEMENT
    - OVERVIEW OF STRUCTURE
    - SAVING DOCUMENTS, FINDING MATTERS, OPENING DOCUMENTS

- ❖ **DAYS 2 - 5**
  - ➢ OFFICE MANAGEMENT
    - VIDEO CONFERENCING - SCHEDULING, JOINING, IN SESSION CONTROLS
  - ➢ CYBERSECURITY
    - CYBERSECURITY BASICS
  - ➢ MATTER MANAGEMENT
    - FINDING MATTER-RELATED INFORMATION, ADDING NOTES, USING TASKS, AND CALENDARING
  - ➢ DRAFTING DOCUMENTS
    - PDF SOFTWARE BASICS
    - PROCEDURES (USING TEMPLATES, FINDING LANGUAGE)

- ❖ **WEEK 2**
  - ➤ HUMAN RESOURCES
    - INFORMAL MEETINGS WITH TEAM MEMBERS
    - OFFICE MANAGEMENT
    - OUTLOOK BASICS
  - ➤ MATTER MANAGEMENT
    - UPDATING MATTER AND CONTACT INFORMATION, ADDING NEW CONTACTS, OPENING NEW MATTERS
  - ➤ TIME, BILLING, AND ACCOUNTING
    - REVIEWING AND EDITING TIME ENTRIES
  - ➤ DOCUMENT MANAGEMENT
    - SIMPLE SEARCHING
    - MORE IN DEPTH ON STRUCTURE
  - ➤ DOCUMENT DRAFTING
    - DEFAULT SETTINGS, CUSTOMIZING THE INTERFACE, AND VIEW SETTINGS

- ❖ **WEEK 3**
  - ➤ MATTER MANAGEMENT
    - CLOSING MATTERS
  - ➤ TIME, BILLING, AND ACCOUNTING
    - LOOKING UP BILLING INFORMATION
  - ➤ DOCUMENT MANAGEMENT
    - ADVANCED SEARCHING
  - ➤ DOCUMENT DRAFTING
    - FONT, PARAGRAPH, AND SECTION FORMATTING

- ❖ **WEEK 4**
  - ➤ CYBERSECURITY
    - REFRESHER TRAINING
  - ➤ MATTER MANAGEMENT
    - INTERFACE CUSTOMIZATIONS
  - ➤ TIME, BILLING, AND ACCOUNTING
    - EXPENSE REIMBURSEMENTS AND CHECK REQUESTS
  - ➤ DOCUMENT MANAGEMENT
    - INTERFACE CUSTOMIZATIONS
  - ➤ DOCUMENT DRAFTING
    - STYLES

- ❖ **MONTH 2**
  - ➢ DOCUMENT DRAFTING
    - ADVANCED PDF TRAINING
    - EXCEL TRAINING
    - TABLES OF CONTENTS
    - TABLES OF AUTHORITIES
    - BOOKMARKS AND CROSS REFERENCES

- ❖ **MONTHS 3 TO 5**
  - ➢ MATTER MANAGEMENT
    - REFRESHER TRAINING
  - ➢ TIME, BILLING, AND ACCOUNTING
    - REFRESHER TRAINING
  - ➢ DOCUMENT MANAGEMENT
    - REFRESHER TRAINING
  - ➢ DOCUMENT DRAFTING
    - REFRESHER TRAINING
    - REBUILDING DOCUMENTS FROM SCRATCH

- ❖ **MONTHS 6 TO 9**
  - ➢ CYBERSECURITY
    - REFRESHER TRAINING
  - ➢ MATTER MANAGEMENT
    - REFRESHER TRAINING
  - ➢ TIME, BILLING, AND ACCOUNTING
    - REFRESHER TRAINING
  - ➢ DOCUMENT MANAGEMENT
    - REFRESHER TRAINING
  - ➢ DOCUMENT DRAFTING
    - REFRESHER TRAINING

- ❖ **MONTHS 9 TO 12**
  - ➢ CYBERSECURITY
    - REFRESHER TRAINING
  - ➢ MATTER MANAGEMENT
    - REFRESHER TRAINING
  - ➢ TIME, BILLING, AND ACCOUNTING

- REFRESHER TRAINING
- ➤ DOCUMENT MANAGEMENT
  - REFRESHER TRAINING
- ➤ DOCUMENT DRAFTING
  - REFRESHER TRAINING