**Induction Plan**

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| **Employee:** | **Buddy:** | **Start Date:** | |
| **Job Title:** | **Mentor:** |  | |
| **Topic** | **Task** | **Key Considerations** | **Timescale** |
| **Welcome and introduction** | * Meet and greet * Virtual team meeting * Key stakeholder meetings:   + Meeting 1@ 10am   + Meeting 2 @ 12pm   + Meeting 3 @ 2pm * Team Lunch * HR/Payroll Admin | * IT set-up * Logins and access to network drives * Video conferencing tools * DocuSign or similar for signing documents | **First Day** |
| **On-the-job Training** | * Job-shadowing * File audits | * Conduct job shadowing via screen-share | **1-3 months** |
| **Technical Training** | * E-learning modules | * Access to e-learning portal (if available) |  |
| **Compliance** | * Understand the role of FCA * Mandatory e-learning modules:   + GDPR   + Money Laundering   + Sanction checking | * Access to e-learning portal * Consider using intranet functionality or DocuSign to confirm policies read and understood | **1-3 months** |
| **Learning and development** | * CPD requirements and recording * CII qualifications | * Access to CPD recording tool (eg. Broker Assess) * Investigate CII’s Covid-19 response for exams if currently studying | **1-6 months** |
| **Other** | * Integrate into the team | * Arrange virtual social events * Ask team to set up 1-2-1 calls |  |