**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)
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| **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
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