How to Successfully Integrate a New Hire

Here are three major steps you can follow to help you effectively train and integrate a quality New Hire. You will notice this process requires foresight and planning, which is why the previous best practice was covered first. It allows you to lay the foundation for having all this ready to go on day 1 for the New Hire.

Provide an Organized & Professional Environment

Imagine getting excited about going on vacation: you excitedly pack your vacation belongings, make the big trip to get there, finally arrive and check into your beautiful hotel room with excitement and anticipation – and the room is in a state of total disarray. This terrible first impression will have a lasting impression on that vacation experience forever. You may even decide that you will seek alternate arrangements. No wonder-if this is the service you received on day 1, what can you possibly expect for the rest of your stay?

Therefore, it's imperative that the New Hire's 'home away from home' is professional, comfortable, and welcoming.

First, however, you will want to give them a welcome tour of the office, introducing them to others and highlighting any great features and amenities available to them. For instance, you may have bike storage, showers and lockers, or access to nearby fitness facilities. Or perhaps there are certain perks available in the kitchen. Be sure to provide information on accessibility, parking, and any other important topics as they get settled in.

- Make sure they have a professional, comfortable, pleasant physical place to work.
- Make sure they have necessary hardware such as, computer, telephone, etc. to do their job.
- Make sure they have access to all the necessary software applications (i.e., have been set up with passwords etc.).
- Make sure they have the basic tools necessary to work (pens, paper, stapler, etc.).
- Make sure they have the specialized job tools they need for their role (i.e., things that make life better such as a telephone headset, 3-hole punch, software applications – if, and when required).
- Give them permission to 'take control' of their workspace to be efficient and effective.
- Confirm days & hours of work and confirm breaks & lunch time to be taken.
- Give them a note pad & pen and the Integration Checklist you have created for them.
- Leave them to get settled into their new workspace and begin working through their Integration Checklist.

Provide A RoadMap to Success

It is important to ensure the New Hire has a solid road map on how to get settled in as it relates to getting to know the practice, the team, and their specific role.

This can be as simple as a detailed list in a Word Document or an Excel Spreadsheet. Effective templates for both are provided in this best practice. It may be a combination of both.

You may want to create an awesome first impression by providing them with a professional **Welcome & Integration Binder.** This would include numerous resources to help them get started, including these checklists. It may include any number of the following:

- Job Description
- Integration Checklist
- Team Procedures as it relates to their specific role
- Your Advisory Blueprint (so they know who does what)
- Weekly Team Meeting Agenda
- Training Checklists provided by the firm for Compliance
- Resources related to Technology Training at the firm or by third-party providers
- Firm HR Policies
- Firm Marketing & Branding Policies
- Anything else you believe would be helpful to get them organized for their new role in the first 90 days of training

Along with the **Welcome & Integration Binder,** you can have a nice firm-branded pen and pad of paper for them. Even better, have a 'surprise & delight' **welcome gift** waiting for them too. This could be flowers or a nice plant for their workspace, some decadent treats, a mug, or anything else you think they may appreciate based on what you know about them so far. This is always accompanied by a beautiful handwritten card to let them know how much you and the rest of the team look forward to working with them.

Maintain Effective Ongoing Team Communication

Each time you add someone to your team, communication becomes even more important. You must have a solid, structured, and predictable process for team communication, not only to keep everyone on the same page, but to demonstrate leadership. Otherwise, everyone is working in their individual silo focused on only one piece of the 'widget' they are making – easily losing sight of the bigger picture and vision of the practice.

Here are a few best practices you can incorporate as it relates to fully integrating the New Hire:

- **DAILY MEETING** with the Advisor to overview the day – it should only be 10 or 15 minutes in length and ensures priority items are handled. This meeting will likely be longer at the outset of a New Hire, so be patient and know as they learn more, this meeting will become more efficient.

- **WEEKLY TEAM MEETING** – This is necessary to ensure everyone is on the same page and results in fewer interruptions through the week. If something comes up and it is not urgent, simply pop it onto your Weekly Team Meeting Agenda**.**

  

  The Weekly Team Meeting is about 30 minutes, and it is very important to ensure everyone is on the same page. Again, this meeting may take longer at the outset of a New Hire, but 20-30 minutes should be the target for this meeting.

  - The Weekly Team Meeting ensures you will spend less time wondering and worrying if something is done and making last minute requests (which nobody appreciates).
  - The Weekly Team Meeting helps transition you and your team from reactive to proactive.

  You will want to have a Weekly Agenda to work from. Different sections of the Agenda may be led by different team members, although everyone participates in the discussion. You will have to adopt an Agenda that works best for your team, but here is an idea of what the Agenda may look like:

  One person should be responsible for scheduling, printing the Agenda, and rounding everyone up. They may even wish to provide a quick email summary after the meeting to highlight action items and accountabilities.

  This concept is mapped out in detail in a separate best practice found in the **Purposeful Leadership** section of this program.

- Ensure you have developed **TEAM GUIDELINES** for all the various forms of internal and external communication. It will ensure consistency of use, consistent branding of the team, professionalism, and minimal interruptions to the Advisor.

  The Weekly Team Meeting concept is mapped out in detail in the **Systematize Your Practice** section of the program.