



Employee Expectations

Employee Name: _____

Date: _____

1. Professional Conduct

- Greet colleagues and clients professionally (e.g., “Good morning” when arriving; address clients by name).
- Keep all conversations about client cases, budgets, or personnel matters within the office or approved platforms only—never share with friends, family, or social media.
- If you make a mistake (e.g., send an email to the wrong person), immediately notify your supervisor, take corrective steps, and document the fix.

2. Communication

- Check email, voicemail, and Teams/Slack by **9:00AM**, after lunch, and before leaving for the day at **5:00PM**.
- Respond to routine messages within **24 hours**; urgent requests (marked “high priority” or texted by supervisor) within **3 business hours**.
- If unclear on a task, draft your understanding and confirm with your supervisor before beginning.
- Complete Monday morning update (tasks for the week, deadlines) by **11AM Monday** mornings.
- Complete Friday summary (accomplishments, challenges, items needing support) by **4pm Friday**.

3. Attendance & Punctuality

- Be at your desk, logged in, and ready to work by **8:30 AM** each day.
- Lunch break: **12:00–1:00 PM** unless otherwise approved by your direct supervisor (or appointed stand-in when supervisor is away).
- Notify your supervisor via call/text if you will be more than 10 minutes late.
- PTO must be requested through the HR system 48 hours in advance (except emergencies). For same-day emergencies, call your supervisor before your scheduled start time.

4. Work Quality

- Review all documents/reports for spelling, formatting, and accuracy before submission (use spell check and peer review when possible).
- Submit weekly reports by Friday at **4:00 PM** without exception.
-



- If a project deadline cannot be met, notify your supervisor at least **48 hours** prior. Provide a revised plan if possible, or discuss with supervisor.
- We all make mistakes! If errors are identified document what happened in the shared **Learning Sheet** and provide 1–2 step suggestion to prevent recurrence.

5. Collaboration

- Speak at least once in every Monday Morning team meeting (share progress, ask a question, or provide input).
- We are all a team! Accept constructive feedback without defensiveness and apply suggested changes within the same project cycle.
- Offer help when teammates express workload strain (e.g., “I can take two calls for you this afternoon”).

6. Growth & Development

- Spend **30 minutes per week** (during work hours) reading industry news or organizational resources and share one takeaway in Friday updates.
- Attend at least one training session per quarter (internal or external). If you have problems finding or identifying training, your supervisor will have suggestions and trainings available for you.

7. Performance Metrics

- Work is accurate 95% of the time or higher (errors are rare and corrected quickly). If uncertain about work accuracy, discuss with supervisor before submittal. Accuracy rates can be seen in our tracking system (INSERT SYSTEM).
- Tasks and reports are delivered on or before the deadline 90% of the time. Timeline details are identified through our system (INSERT YOUR SYSTEM).
- By the end of your first 90 days, you should be able to independently manage your daily tasks, meet deadlines without reminders, and contribute to team discussions with confidence.