

# Get Onboard!

Use this checklist to get the most out of the software in the first quarter.

## GENERAL

- [Fill out company profile](#)
- [Fill out personal profile](#)
- [Invite team members](#)
- Configure your integrations - [Slack](#) - [Tasks](#) - [Salesforce](#)
- Check out the [Align Academy](#).

## STRATEGY

- [Fill out](#) what you already have for the One Page Plan and other Strategy Tools ([FACE & PACE](#))
- Add in a Company [Priority](#) for the current time period and break that into individual priorities  
*Note: We recommend each person should own no more than 2-3 priorities.*  
*Hint: Use tasks as milestones if you have the priority broken down into smaller time periods*
- [Add in at least one Critical Number](#) (and sync it with an integration if applicable!)

## COMMUNICATION

- [Create & start doing](#) your Daily Huddles - at least 1 company wide daily recommended
- Create and [start doing](#) your Weekly Huddle
- Set up 1:1's as weekly manager meetings with consistent cadence
- [Add Top Priority](#) to Daily Huddle rhythm
- [Use Stucks](#)

## CULTURE

- [Create eNPS cadence](#)  
*Hint: Recommended 1st or 15th of month, each month*  
*NOTE: eNPS will only go out to those that have accepted invitations for the software*
- [Create a Company Announcement](#)
- [Create Surveys](#)  
*Hint: Use a survey to review your core values with the team*
- [Review the Reports](#) - what does your team's participation look like? How is each team doing with priorities?

## EXTRA: ADVANCED FUNCTIONALITY

- [Security](#).
- [Tags](#)
- [Teams](#)
- Integrations - in Depth - [Zapier](#) - [Slack](#) - [Salesforce](#)