



## Next Steps Checklist For New Expert Organizers

**Objective:** Provide you with a clear path for joining the Me In Order community and platform.

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- ☒ Introduction: Reading the content found at MeInOrder.com and gaining a solid understanding of what we do and why we do it.
  - ☒ “Getting To Know You” form: Questions asked of you via web form to help us get to know you better prior to our Introductory Call.
  - ☒ Introductory Call: A 15 to 30-minute telephone call with a MiO representative. This call is meant to answer your initial questions.
  - ☒ MIO 101: A course designed to provide you with the details about the MiO platform and provide you with your first experience with the classroom education.
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- ☐ Partner Meeting: 1-on-1 video conference with Jeremie Barber
- ☐ Organizing pictures upload
- ☐ Teammate Starter Membership purchase
- ☐ Receive Starter Kit
- ☐ Forms to complete
  - ☐ W-9 Form
  - ☐ Direct Deposit Form
  - ☐ Background Screening Authorization
- ☐ Schedule headshot appointment
- ☐ Send headshot to MiO Central

- ☐ Complete the **Foundations** course and final exam ( > 70%)
    - ☐ Complete Fieldtrip
    - ☐ Complete DiSC Assessment
  - ☐ Teammate Pro Membership purchase
  - ☐ Receive Pro Kit
  - ☐ Complete the **MiO Platform** course and final exam ( > 70%)
  - ☐ Complete **The Platform Systems** course
  - ☐ Platform profile completion
  - ☐ Attend my first Workshop
  - ☐ Begin organizing with clients (field experience)
  - ☐ Receive deposit card (for cash and check payments)
  - ☐ Complete my first 2 Starter Sessions (we add the counter banner to your page)
  - ☐ Earn the Team Captain badge
  - ☐ Complete my first 100 billable hours
  - ☐ Earn the Certified Expert Organizer® designation
  - ☐ Receive Certification Kit
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**Expectation:** Getting started with Me In Order is a lengthy process by design. Only those that embody P.E.A.C.E. make it all the way through and receive their Certified Expert Organizer® designation. You've got this!