



Member Onboarding Worksheet

Thank you again for choosing Contractor University.

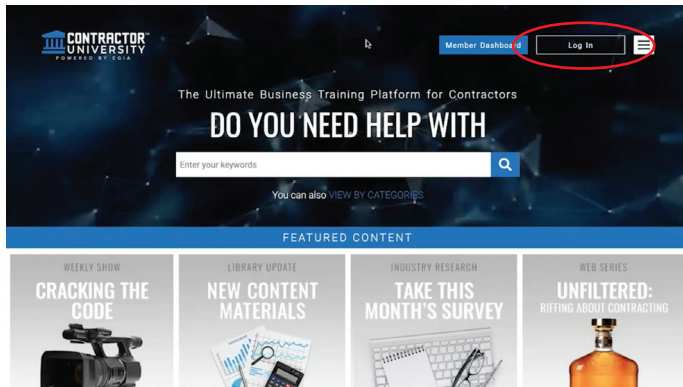
To gain the most from your membership, please complete this worksheet within the first week of your membership (prior to the 1-week onboarding call) and return it to your Contractor University Account Manager.

Member Checklist

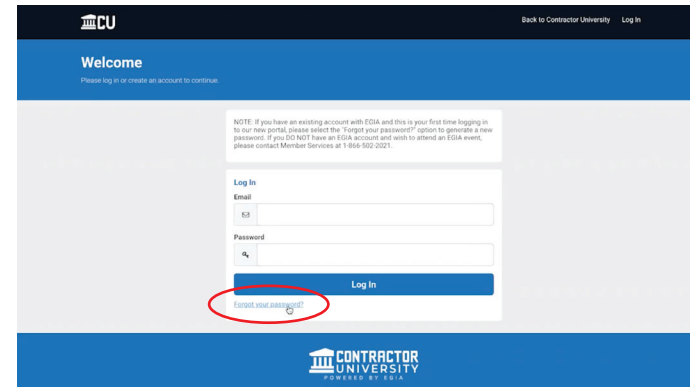
Log-in Password

Change your log-in password to something you will remember.

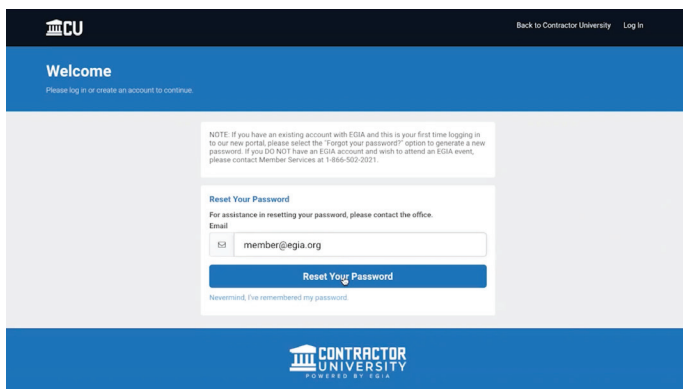
1.



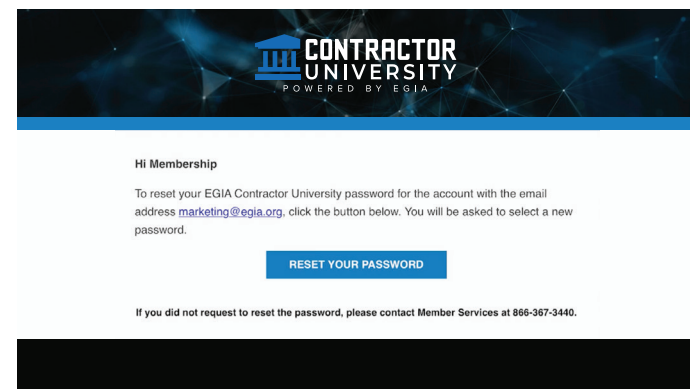
2.



3.



4.



If your account is set up and current, you will receive an email with a link to reset your password after step 4.

[Click here](#) for a step-by-step video of the process. If you do not receive an email, check your email spam folder or call member services for assistance at **866-502-2021**.

Whitelist/Safe Senders List

Add @egia.org and @egiainfo.com to your email's whitelist/safe senders list.

Not familiar with this process? [Click here](#) for some assistance.

Email Verification

Open the email from Contractor University (**memberservices@egiainfo.com**) that has the subject line “**Contractor University Email Verification**” and click the button to verify you are receiving our emails.

Compatible Web Browser

Ensure that you are using a compatible web browser ([Chrome](#), [Firefox](#), [Safari](#), [Edge](#)) in order to receive the best experience and have access to library materials.



Microsoft Office Programs

Confirm that you have functioning Microsoft Office programs such as Word, Excel and Powerpoint (or equivalent applications capable of reading/editing .doc, .xls and .ppt files) installed on your computer or electronic device. Most of the materials in the library will be from one of these programs and you will be able to download and edit the documents yourself.

Member Dashboard

Explore the [member dashboard](#) and all member benefit programs. The dashboard is your one-stop-shop for anything you might want information on. You can quickly search our [online classes database](#) or see what has been recently added in our [“What’s New”](#) section. Please write down any questions you have on page 6, so you may go over them with a member services representative.

Separate Log-in Accounts

Come up with a list of individuals in your company that should have a separate log-in account (Page 7). Adding and removing users can be completed on the website by [managing your roster](#). If you need additional assistance please contact member services at **866-502-2021** and your account manager will help you add the users.

Business Evaluator Form (optional)

If you have not already, complete the business evaluator form online to receive your customized roadmap. The business evaluator tool is a powerful and easy to use system that will help identify your unique business challenges, areas for improvement and critical priorities. Once you complete this online form, we will develop a training roadmap tailored for your company. You'll receive a detailed plan that outlines the Contractor University tools and resources that your business should utilize first, based on your company's specific needs. Visit resources.mycontractoruniversity.com/evaluator, or [click here](#) to get started!

Join the EGIA Contractor Connect Facebook Group (optional)

If you have a Facebook account, and want to join the exclusive and knowledgeable contractor group, head to the member portal and click on the “**Facebook Contractor Connect Group**” button towards the bottom of the page, or [click here](#)!

Premium Member Seat Reservation

If you are a premium member, you may begin reserving your seat for any events you know you will want to attend – they sell out fast! [Click here](#), or visit mycontractoruniversity.com/events to view all events.

1. Do you currently offer financing to your customers?

Yes No

2. Which financing companies do you currently use?

3. Who is your distributor?

4. What is your primary brand of equipment sold?

5. Are you interested in learning more about EGIA's OPTIMUS financing program on our next call?

Yes No

List all additional individuals in your company that you would like to have separate log-in accounts for:

First Name _____ Last Name _____

Job Title _____ Email Address _____

Access Level: Staff Owner/GM

First Name _____ Last Name _____

Job Title _____ Email Address _____

Access Level: Staff Owner/GM

First Name _____ Last Name _____

Job Title _____ Email Address _____

Access Level: Staff Owner/GM

First Name _____ Last Name _____

Job Title _____ Email Address _____

Access Level: Staff Owner/GM

First Name _____ Last Name _____

Job Title _____ Email Address _____

Access Level: Staff Owner/GM