Successful Onboarding Checklist

Each stage of the onboarding journey with a new employee holds significance, spanning from pre-employment preparations, through their initial month, to the triumphant conclusion of their inaugural year.

This comprehensive checklist has been crafted to facilitate seamless navigation through the onboarding process within your company. Furthermore, it can serve as a valuable tool for assigning responsibilities and establishing timelines to support the successful integration of new employees into the business.

1. Preboarding

**Schedule and Job Duties**

* Send and confirm offer letter.
* Dispatch contract of employment.
* Complete and verify background and security checks, if applicable.
* Contact employee:
  + Confirm start date, time, location, provide directions, parking details, and dress code.
  + Discuss transportation options and parking or public transport links.
  + Inform employee of lunch arrangements for the first day.
  + Request necessary documentation such as P45 or HMRC new starter checklist, Passport, Visa, etc.
  + Assess I.T. and computer requirements for role.
  + Introduce the onboarding buddy for their first week.
* Prepare employee’s calendar for the initial two weeks.
* Coordinate with management and team leader(s) to plan employee’s first tasks and assignments.

**Socialisation**

* Email the department and/or team introducing the new employee, including start date, role, and brief bio. Copy-in the new employee, if appropriate.
* Schedule meetings with key individuals for the employee’s first few weeks including team members, department heads, HR representatives, manager(s), and director(s).
* Assign an appropriate buddy, from the same team to provide guidance and support.
* Organise lunch with the buddy or relevant individuals for the first day.
* Conduct a meeting with the buddy to provide relevant information about the new employee and discuss role and responsibilities.
* Arrange for an office or building tour and ensure all security passes are prepared (if required).
* Provide information about local amenities such as ATMs, banks, shops, supermarkets, post offices, pharmacies etc.

**Work Environment**

* Prepare a welcome pack for the new starter, include a job description, welcome letter, contact details, office map, parking and transportation information, company mission statement and values, building information, and security details.
* Clean the set up the work area with necessary supplies.
* Arrange for office or work area keys / fobs / building access pass, if required.
* Order business stationary, cards, and name plates if necessary.
* Allocate parking and provide parking pass, if needed.
* Add employee to relevant email lists, WhatsApp groups, video conferencing apps or internal email distribution groups.

**Technology Access and Related**

* Order necessary technology equipment (computer, printer, tablet, telephone, mobile phone, laptop, etc.) and set up software. Provide instructions for all devices.
* Provide personal use policies for technology.
* Coordinate with the I.T. department / supplier to set up the I.T. system in advance.
* Arrange for access to shared drives and set up new folders.
* Arrange for communications installation, Wi-Fi access, etc.
* Update telephone directory, intranet, and extranet.

**Training/Development**

* Remind employee to sign up for new employee orientation workshops and training sessions.
* Arrange training and presentations required for the specific job role.

2. First Day Experience

**Schedule, Job Duties, and Expectations**

* Discuss sign and file the Contract of Employment if not already done.
* Provide all payroll information to the HR or Finance department.
* Ensure completion of any employee benefits forms such as health cover, childcare vouchers, life insurance, etc.
* Complete the Emergency contact details form and submit to the HR department.
* Clarify the schedule for the first week and confirm required and recommended training.
* Offer an overview of the functional area – its purpose, organisational structure, and objectives.
* Review job description, outline of duties, and performance expectations.
* Explain how the employee’s role fits within the department and contributes to the overall company objectives (if applicable).
* Review and explain working hours, policies, and procedures for overtime (if paid), sickness, annual leave., and any flexible work policies or company procedures.

**Socialisation**

* Greet the employee on their first day and introduce them to the team and management.
* Introduce employee to other colleagues in the business.
* Facilitate the buddy introduction.
* Arrange for lunch with the buddy or team members.

**Work Environment**

* Provide building access (key, card, pass, etc.) and ensure all necessary documentation is signed.
* Offer information and booking credentials on shared offices, conference rooms, or spaces where access is required.
* Escort employee to the first training session and provide necessary guidance.
* Discuss transportation and parking options.
* Provide department safety and emergency information specific to the department and building..
* Conduct a tour of the building and/or site.
* Explain procedures for obtaining additional supplies.
* Provide learning resources, manuals, intranet access, and shared directories.
* Inform the employee about travel expenses, policies, and procedures.
* Explain rules and regulations for visitors in the workplace.

**Technology Access**

* Provide guidance on setting up I.T. equipment, software access, email, voicemail, and conferencing tools

3. First Month Essentials

**Schedule, Job Duties, and Expectations**

* Assign the employee their initial task, tailored to their expertise level.
* Debrief with the employee after initial meetings, training, and assignment, and maintain daily check-ins.
* Provide additional context about the department and organisation to enhance understanding.
* Explain the annual performance review, one-on-ones meetings, and goal-setting.
* Review the probation process and schedule one-to-one meetings accordingly.
* Continue providing on-going feedback and solicit input from the employee.
* Discuss the performance management process and compensation system.
* Set performance and professional development goals and provide additional assignment.
* Provide feedback on the employee’s first assignment and initial tasks.

**Socialisation**

* Introduce the employee to key individuals and facilitate attendance at relevant events.
* Conduct a review with the employee and their buddy, addressing any questions or concerns.
* Arrange for the employee to participate in upcoming social events.
* Schedule regular informal interactions, such as lunch meetings, to foster relationships.

**Training and Development**

* Ensure employee attends all required training sessions and workshops.
* Confirm completion of necessary training and discuss further learning opportunities.

4. First Quarter Tools

**Schedule, Job Duties, and Expectations**

* Continue holding regularly one-on-one meetings and conduct a three-month performance check-in.
* Provide challenging yet manageable assignments.
* Establish performance and professional development goals.
* Explore flexible work options and conduct a three-month performance review.
* Review progress on goals and solicit informal feedback from colleagues.

**Socialisation**

* Arrange opportunities for the employee to shadow managers or team leaders.
* Host informal catch-ups with the employee and buddy.
* Facilitate lunch outings and encourage participation in events outside the work area.
* Conduct a review with the employee and to evaluate their structured relationship.

**Training and Development**

* Ensure completion of all training sessions and provide feedback, as necessary.
* Discuss further training needs and learning opportunities.

**Technology Access**

* Ensure the employee has full access to necessary technology and understands its usage.

5. Measure Success – End of Probation Period

**Schedule, Job Duties, and Expectations**

* Recognise and celebrate employee’s contributions.
* Continue providing regular informal feedback and schedule the Annual Review.
* Conduct a formal review of performance and progress.
* Confer with the employee about their experience at the company to date:
  + Extent to which employee’s expectations of role and responsibilities were met.
  + Extent employee’s skills and knowledge are being utilised by identifying effective methods for their application and exploring opportunities for further enhancement.
  + Review objectives.
  + Discuss the year ahead.

**Socialisation**

* Encourage participation in management meetings and cross-functional teams.
* Solicit feedback on the onboarding experience from the employee.

**Training and Development**

* Discuss professional development goals and identify relevant learning opportunities.
* Schedule performance / objective reviews and acknowledge achievements.