New Employee Onboarding Checklist

wranx
Effective, Measurable Learning

DETAILS

Name:

_____

_____

Position:

_____

_____

Start-date:

_____

_____

Manager:

_____

_____

BEFORE START-DATE

- [ ] Issue formal offer letter and contract of employment prior to commencement date
- [ ] Notify employees of new starter, sharing their job description and contact details
- [ ] Set up an informal induction event (such as a lunch)
- [ ] Send a welcome email, outlining working hours, dress code and what to expect on the first day
- [ ] Provide information about clients / projects they may wish to research
- [ ] Create a learning and development plan
- [ ] Arrange induction meetings with all relevant teams / colleagues for new starter
- [ ] Arrange provision of required IT equipment, software and e-learning platforms
- [ ] Arrange office supplies and business cards, waiting until after probationary period for non-essentials
- [ ] Diarise key dates such as probation periods and review meetings
- [ ] Setup accounts and passwords for software and online services
- [ ] Remind new starter to bring required details / documents, e.g. P45, bank details, referee details
- [ ] Set expectations for team members to help with new starter integration

FIRST DAY

- [ ] Introduce new starter to team and all colleagues or relevant colleagues
- [ ] Provide a full company overview, info about company policies and a tour of the workspace

☐ Provide an induction pack and/or a company handbook with policies / internal processes

☐ Hold induction meeting to provide information, schedule and review of job description

☐ Set up an informal induction event (such as a lunch)

☐ Allow time for new starter to review documents and familiarise themselves with systems

☐ Provide access fob or key to office in accordance with security policies

FIRST WEEK

☐ Outline tasks at the start of each day and debrief at the end of each day

☐ Hold meetings with relevant key senior colleagues

☐ Deliver training for relevant processes, systems and tools

☐ Set goals / KPIs for the new starters first month or first quarter

☐ Schedule regular review or appraisal meetings with line managers

☐ Provide continuous training and check-ins to monitor onboarding success

☐ Make introductions to new key clients

FIRST QUARTER

☐ Hold monthly reviews to monitor onboarding success, using e-learning data where possible

☐ Arrange and deliver additional training and support that is required

ONGOING

☐ Hold quarterly reviews to monitor progress, using e-learning data where possible

☐ Provide ongoing training where required and for new processes, tools and systems

☐ Review and update training & development plan