

# Onboarding Checklist for Personal and Executive Assistants

## PRE-ARRIVAL

- ☐ Call new employee to inform them of their start date
  - ☐ Answer any questions they might have
  - ☐ Provide information on first-day expectations (dress code, what to bring etc.)
- ☐ Prepare onboarding pack (employee handbook, gifts, contact list of key people)
  - ☐ Post onboarding pack to employee
- ☐ Schedule key meetings for first week
- ☐ Create a training schedule for induction/probation period
- ☐ Create key milestones for the year
- ☐ Prepare new employee's workspace
  - ☐ Order new computer/laptop or ensure old machine's files have been wiped by IT before use
  - ☐ Ensure all required software is loaded, updated and configured
  - ☐ Order work phone and set up voicemail
  - ☐ Send access request to IT for shared drives/folders
  - ☐ Request new employee to be added to internal email groups
  - ☐ Order office supplies
- ☐ Arrange security clearance and order swipe card or keys or credit cards if required
- ☐ Set-up welcome lunch with the new employee's manager and their direct report when next possible

## FIRST DAY

- ☐ Welcome your new employee at reception
- ☐ Provide a tour of the workplace (work/department areas, restrooms, printers, conference rooms, water coolers, kitchen areas, break rooms, cafeterias and vending machines)
- ☐ Use the morning to explain the new employee's role and how they can support their manager (have a copy of employee's job description)
  - ☐ Describe organisation's goals, objectives and function
  - ☐ Key industry and companywide acronyms
  - ☐ Explain the chain of command
  - ☐ What things they can action/respond to
  - ☐ What they need to escalate
  - ☐ Role priorities and key relationships
- ☐ Sit down for lunch with manager and direct reports if possible on first day (otherwise do so later in the week)
- ☐ Explain health and safety and emergency procedures
- ☐ Fire exits and emergency evacuation points
- ☐ First-aiders and fire wardens

## FIRST WEEK

- ☐ Review telephone processes and policy
  - ☐ Staff directory
  - ☐ Contact information of frequently used vendors
  - ☐ Dialling instructions for commonly called local/regional/international numbers
  - ☐ Instructions for conference call or webinars
  - ☐ Personal use policy
- ☐ Review IT procedures and policy
  - ☐ Network and remote email access
  - ☐ Intranet
  - ☐ IT support and logging support tickets
  - ☐ IT security and personal use policy
  - ☐ Social media policy
- ☐ Diary/Calendar Management
  - ☐ What's required when taking minutes in meetings (provide key templates)
  - ☐ Expectations around internal and external communication
- ☐ External Relationships
  - ☐ Frequently used vendors (Travel agents, event companies, hotels, car hire etc)
  - ☐ Key business partners
- ☐ Budgeting & Finance
  - ☐ Authorisation limits
  - ☐ Expensive & claim procedures
  - ☐ Travel policy
- ☐ Board Requirements
  - ☐ Board of directors
  - ☐ Board report requirements
  - ☐ Company profile, board of directors, board report requirements
- ☐ Provide three month plan
  - ☐ Set first month priorities
  - ☐ Identify training requirements
  - ☐ Set three month milestones (goals, objectives etc.)
  - ☐ Book review meetings
- ☐ Reaffirm job duties and expectations to employee and indicate point-of-contact if they need help
- ☐ Review HR and Admin policies
  - ☐ Work schedule
  - ☐ Break and lunch periods
  - ☐ Overtime policy, if applicable
  - ☐ Processes for requesting leave
  - ☐ Provide contact for HR

## THREE MONTHS & BEYOND

- ☐ Provide feedback to employee at designated times
  - ☐ Solicit feedback from employee to ensure expectations are being met
- ☐ Encourage your employee to participate in the wider business
- ☐ Set up meetings with key members of other departments relevant to the employee's role (Finance, HR, Board, IT, R&D, etc.)