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## **EMPLOYEE ONBOARDING CHECKLIST: Pre-boarding to Month 1**

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### **Pre-Start Date**

#### Confirmations

- Email your new hire to confirm start date, time, place, parking or transit directions, and dress code. Answer any additional questions they may have.
- Remind the person to bring identification for HR paperwork like their driver's license or other ID and banking information to set up payroll.
- If your company has an employee portal, provide the new employee with a login and direct them to the most pertinent sections so they can review documents prior to starting.
- Prepare the new hire's calendar for the first two weeks, adding in relevant meetings and events.
- Schedule the new employee with a late start, about 10 a.m., to alleviate the stress of getting to the office the first day. It also gives your staff time to get settled in before the new person arrives, so they are ready to provide a proper welcome.

#### Social Integration

- Send out a detailed introduction email to the new hire's team or to the organization. Be sure to include their start date, department, title, bio and copy your new hire at both their personal and work address.
- Select a "buddy" for your new hire and provide suggestions and tips to help them prepare to assist on the new employee's first day.
- Schedule meetings with team members for the new hire in their first week. This will ensure they begin learning from day one while also meeting various people on the team.
- Arrange a building/company tour to give the new hire a good sense of where everything is, especially the departments or areas that are most important to their daily job.

- Plan a lunch for your new hire, their "buddy" and the rest of the team during the first week. Offer a few venue suggestions of places and let them choose.

### Work Environment

- Prepare a welcome packet that includes a copy of the contract, job description, important contacts and phone numbers, transportation, a map of the office and surrounding areas for lunch, the company mission statement, information about their department and other helpful information.
- Order the employee's business cards, name plate, office keys, pass cards, parking pass, work area keys and any other items they will need.
- Add the employee to all relevant group email lists.

### Technology and Passwords

- Identify all technology needs such as a laptop, tablet, mobile phone, and desk phone, order them in advance and have all items set up and ready to go on the first day.
- Ensure user names and temporary passwords are created and available.
- Provide printer access and check it is working.
- Identify all software and networks the person will be using, and the level of clearance required to ensure they have access to all documents and files they need.
- Schedule time with the new hire to review each item, make sure all are working, and allow them to update their passwords.

### Training & Development

- If your organization has a New Employee Orientation program, sign-up your new employee for an in-person session.
- For companies without an orientation program, schedule time with the hiring manager and HR to take the employee through the policies and procedures.

- Determine the formal training required and schedule sessions in the first two weeks on the job. If your company has a learning management system (LMS), create a learning path for your new hire and schedule time for all necessary courses.

**NOTES:**

**Day One**Social Integration

- Be there to greet the new hire on their first day. Again, giving a late start will allow you to get any necessary business out of the way to give them your entire focus.
- Have a welcome package at your new hire's desk when they arrive – this can include company SWAG to make them feel part of the team. This will make a memorable first day.
- Take them on the scheduled tour and once they are settled introduce them to the team and department.

Set Expectations

- Provide a full overview of their functional area and department. Outline how it contributes to the mission and vision of the overall organization and its business goals.
- Review the job description, being sure to answer any questions. Explain how the role fits into the department and the organization.
- Review the first week's schedule including the training and any meetings they will be attending. Have a copy printed out to review.
- Attend a meeting with HR to set up payroll and benefits. Explain policies and procedures covering work hours, lunch and breaks, sick time, overtime, vacation and holidays.

**NOTES:**

## **The First Month**

### Meetings and Feedback

- The manager and new hire should discuss a 30, 60, 90-day plan which outlines immediate and longer-term goals to ensure both are on the same page.
- Schedule weekly team meetings to discuss the departmental goals and offer a forum to answer questions and discuss potential issues.
- Schedule regular one-on-one meetings to discuss the individual's progress, answer questions, address issues and offer a forum for new ideas.
- Between formal employee reviews, plan interim meetings to discuss the employee's goals, the career path, and how they can grow with the organization.
- Keep up to speed on industry training, technology training and job training that will help further develop your new hire.

### Become Part of the Team

- Encourage the new hire to attend social events, have lunch with colleagues and meet new people within the organization.
- Have new hires shadow the supervisor or manager at meetings to create opportunities for further exposure to other team members and learn more about the department and organization. As a new person, they offer a fresh perspective and may have new ideas to contribute.

### **NOTES:**