



## Checklist for Successful Onboarding

### Preparation - Start before Day 1

|  |  |
|--|--|
| Send out necessary paperwork   |  |
| Perform relevant background checks                                       |  |
| Prepare the work environment   |  |
| - Allocate IT and other equipment  |  |
| - Desk / Workspace / Stationery  |  |
| - Grant system access  |  |
| - Supply office key codes  |  |
| - Ensure any special accommodations required are addressed and organised |  |
| Announce new hire to existing staff                                      |  |
| Inform payroll department  |  |
| Issue employment contract  |  |
| Send a welcome email that outlines expectations                          |  |
| Plan Day 1 onboarding and agenda   |  |

### Day 1 – Make first Impressions Count

|   |  |
|---|--|
| When possible, greet them at the door   |  |
| Introduce them to the team they will be working with, including direct line manager                 |  |
| Provide an office / workplace tour  |  |
| Provide phone directory/email contacts with new employee details added                              |  |
| Supply a copy of the Organizational Chart   |  |
| Inform them of the location of:<br>- Restroom<br>- Break room<br>- Coffee machine<br>- Water cooler |  |
| Set expectations with a roles and responsibilities document   |  |
| Present an overview of the company history  |  |
| Present and discuss company culture   |  |
| Issue staff member with:<br>- Code of conduct<br>- Employee handbook<br>- Company policies          |  |
| Present a welcome gift (Company swag, personal coffee cup or similar)                               |  |
| Set an agenda and goals for the week ahead  |  |



## Checklist for Successful Onboarding

### Day 1/Week 1 – Orientate and engage

|   |  |
|---|--|
| Organize direct manager daily check-in  |  |
| Work with new hire to plan week 1 assignments   |  |
| Build in goals with early success scenarios   |  |
| Provide role specific training, ensuring to explain the 'why' they are performing this role, not just the 'how' |  |
| Introduce senior team members   |  |
| Organize a team lunch   |  |
| Explain expenses process and benefits offered   |  |
| Present vacation/sickness procedures  |  |
| Set SMART goals for the probation period  |  |
| End of week HR check-in   |  |

### End of Month 1 - Communicate and support

|   |  |
|---|--|
| Continue with weekly check-in   |  |
| Ongoing training and support  |  |
| Offer to re-visit any tasks or action points (anything they missed or had questions over) |  |
| Undertake a social and emotional wellness check   |  |

### Ongoing - Growth and Development

|   |  |
|---|--|
| Quarterly HR check-ins                          |  |
| SMART goals                                     |  |
| Probation meeting                               |  |
| Undertake a social and emotional wellness check |  |
| Performance reviews                             |  |
| Celebrate anniversary                           |  |



## Checklist for Successful Onboarding

Remote Onboarding – Additional considerations when virtually onboarding

|  |  |
|--|--|
| Deliver equipment ahead of time  |  |
| Have IT call to ensure set-up and access ahead of Day 1  |  |
| Schedule first meeting and first week  |  |
| Provide a welcome buddy  |  |
| Make sure new member is added to all communication channels<br>(e.g. Email, Slack, MS Teams)   |  |
| Provide a welcome meeting with the whole team – a Hello and a smile can make a big difference! |  |
| Discuss the option of greater flexibility, such as slower paced training                       |  |
| Company history, culture – Try a live presentation so questions can be asked                   |  |
| Set expectations early   |  |
| Provide fun, interactive team activities   |  |