

Employee Onboarding Checklist

Before the new Employee's First Day:

- Call the employee to confirm start date, time, dress code, place etc., and remind them to bring along any important documents to fill out forms on their first day.
- Prepare onboarding/orientation pack with company information, employee handbook, benefits information, job description, etc.
- Assign required reading so that the employee can get up to speed on what's happening in their job role and the company.
- Prepare onboarding forms for the employee to complete i.e., W-4, I-9, direct deposit etc.
- Pre-schedule meetings and add these to the employee's calendar.
- Liaise with supervisor and prepare the employee's first assignment.
- Prepare training and development plan to be discussed with employee.
- Assign a buddy or mentor to assist the employee with any job-related questions or issues they may have during onboarding (if applicable).

Work Environment

- Organize work area including desk, chair, computer equipment, and office supplies.
- Order keys/access card, business cards (if applicable).

Technology

- Liaise with IT to set up computer equipment and provide access to company intranet, email, common drives, etc.
- Arrange telephone installation.

First Day

- Welcome the new employee and introduce them to team members and supervisor.
- Take them on a tour of the building.
- Give the employee their orientation pack.
- Ensure that they complete all required forms.
- Discuss job expectations and department goals.
- Run through their schedule for the week.
- Introduce the employee to their work buddy.



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First Week

- Arrange a team lunch (if applicable).
- Ensure employee has a fully functioning computer and network access.
- Meet with key staff members and senior management if possible.
- Run through tasks to be performed and ensure the employee has a clear understanding of their job expectations over the next six months.
- Give employee their first assignment.

First Month

- Arrange check-in meetings to determine how well the employee has acclimatized to the organization and address any concerns they may have.
- Ensure the employee attends required training.
- Discuss performance goals and the performance review process.

First 3 - 6 Months

- Review employee's progress, KPIs, and milestones reached in order to determine if further training is required.
- Request feedback to understand the employee's perception of the job and if it aligns with their expectations.
- Meet with employee and their buddy at the end of the employee onboarding process to discuss how well everything went and if anything could be done better.
- Offer continued support to enable the employee to reach their full potential.

