

Checklist

New Hire Onboarding Checklist

PURPOSE OF THIS DOCUMENT:

A strong onboarding process results in much happier employees. It helps employees get to know one another and learn how to communicate effectively. Onboarding also helps people discover how their roles fit in with the rest of the company's workforce

This document will assist you in creating the right "first impression" and enable you to fast track your new employee to competency.

The onboarding process should be facilitated by HR with support by the Line Manager.

Employee Name	
Position Title	
Start Date	

ONBOARDING TEAM

- *Line Manager*
- *Training Specialist - if applicable*
- *Human Resource Practitioner*
- *On-boarding Buddy*

** Update accountabilities table to meet your company context.*

PRE-HIRE			
Action	Accountable	Date	Status
Before their first day <ul style="list-style-type: none"> • Have the new employee complete their new hire paperwork. 	HR	4 weeks before the start date	
Prepare onboarding materials for your new employee including: <ul style="list-style-type: none"> • Email welcome letter • Company announcement • Company electronic promotional material (e-mag, newsletter) • Relevant new employee documentation (including all new employee onboarding paperwork, policies, procedures etc.) 	HR	4-6 weeks before the start date	

<ul style="list-style-type: none"> • Update all relevant company contact lists & email distribution lists to include new employee • Team contact details • Prepare induction calendar for the first three months, • List scheduled stakeholder meetings for the first 2 weeks • List essential online training • Departmental meetings and events • Links to company intranet/ websites/ websites 			
Arrange PC	HR	4-6 weeks before the start date	
HR to set up meeting with the line manager to discuss responsibilities around arrival of the new hire.	HR	4-6 weeks before the start date	
<p>Appoint an *onboarding buddy from within team.</p> <p><i>*A buddy should be an effective communicator, capable of providing the necessary information to the new hire, to support their smooth navigation of the work environment. The buddy can use his or her knowledge of the workplace culture to assist the new employee in getting a head start on networking.</i></p>	Line Manager	4-6 weeks before the start date	
New Employee essential company training arranged.	Training Team	2 weeks before the start date	
<p>Arrange with the IT Department to set-up the new hire's PC:</p> <ul style="list-style-type: none"> • Pre-load any required software and systems • Set up access to Network & Public Folders 	Line Manager/ IT	2 weeks before the start date	
Arrange for access cards – if applicable.	Facilities / Security	2 weeks before the start date	
Arrange for access to the printer.	Line Manager/ IT	2 weeks before the start date	
Schedule line manager to “meet-and-greet” the new employee upon arrival on their first day.	HR	2 weeks before the start date	
Schedule a one-hour meeting with Line Manager on the first day for an introductory check-in meeting.	Line Manager	2 weeks before the start date	

Schedule a meeting of at least two-hours with the line manager on the second day for a new employee induction meeting.	Line Manager	2 weeks before the start date	
Schedule time on the first day for general introductions and an amenities' tour.	HR	2 weeks before the start date	
Schedule an introductory lunch or breakfast with team, preferably on the first day, but otherwise in the first week.	Line Manager	2 weeks before the start date	
Schedule meetings with key stakeholders and customers to discuss expectations, role, interface and functions for the first week (where appropriate).	Line Manager	2 weeks before the start date	
Schedule a two-hour meeting for the New employee with the Learning and Development Team to discuss On-Boarding & job-specific training.	Training Team	2 weeks before the start date	
Schedule a two-hour meeting with HR to complete the employee take-on documents and to answer any questions regarding benefits, salary, pay runs, leave, policies and other possible HR related concerns.	HR	2 weeks before the start date	
Include the new employee in all meetings scheduled for general communication: <ul style="list-style-type: none"> Departmental /team meetings 	Line Manager	2 weeks before the start date	
Office, desk and telephone/s sourced <ul style="list-style-type: none"> Equip the workstation with basic stationery supplies Order cell phone (where applicable) 	HR	Week before	
Update all relevant email distribution lists to include the new hire's email, position and details.	HR	Week before	

DAY 1 – DAY 3			
Action	Accountable	Date	Status
Meet-and-greet on arrival.	Line Manager	Day 1	
Take photo of the new employee to prepare access cards – if applicable.	Facilities / Security	Day 1	
Meet with the new employee to sign and discuss all relevant documents be completed.	HR	Day 1	

Meet the team – If possible, schedule a breakfast/lunch meeting with the team to introduce the new employee to everyone informally.	Line Manager	Day 1	
Meet with the Health and Safety Representative for a safety induction.	Health and Safety Rep	Day 1	
Conduct a tour of your department and building.	Line Manager	Day 1	
First meeting with the line manager: <ul style="list-style-type: none"> • Welcome • What support do you need to get settled? • High-level focus areas for work in the first month • Discussion of the expected induction activities planned for the week • Do you have any questions, concerns? • Discuss scheduled meetings set up for the next few days 	Line Manager	Day 1	
Workstation orientation <ul style="list-style-type: none"> • Welcome to your 'workspace'... • Receive cell phone & overview of cell phone policy, where applicable • Printer orientation • Receive list of all Outlook meetings scheduled in advance for the week/month ahead 	HR	Day 1	
PC orientation <ul style="list-style-type: none"> • Receive PC • Logon and password orientation • Departmental data and filing tree (information storage system on site server) 	IT	Day 1	
Meet other teams	Line Manager	Day 3	
Line manager induction meeting. Prepare copies of the organogram and team goals. Meeting discussion topics should include: <ul style="list-style-type: none"> • Organisation structure • Overview of the company's products and/or services • Team goals (team orientation, focus areas at work, work styles, communication styles) • Objectives, KPI's & goals: the new hire's performance requirements; how the success of the individual fits into the broader purpose of the team • Explain the new hire's new job 	Line Manager	Day 3	

Meet with new employee once a week for at least four weeks, then reassess and ask whether the new employee needs less/more support from you.			
Company induction meeting. Discussion topics should include: <ul style="list-style-type: none"> • Company history • Business strategy • How departments work together • Key external and internal customers (roles, support, expectations and challenges). 	Line Manager	Week 2	
Meet with the Learning and Development Specialist to discuss their onboarding programme for next 3 months & job-specific training.	Training Team	Week 2	