

How to Onboard New Employees

Our Step-by-Step Checklist



Pre-workplace preparation

- ❑ Clarify job role, responsibilities, pay and benefits
- ❑ Speak with the new employee over the phone
- ❑ Ensure all paperwork is sent quickly, signed, returned and processed before the start date
- ❑ Provide all the information that the employee will need for Day One - start date, location, login information, what they need to bring, instructions for parking, dress code and a rough agenda for the first week

Day One Introductions

- ❑ Make sure someone is ready to welcome the new employee
- ❑ Prepare the employee's workstation for their arrival
- ❑ Present the employee with their welcome bag. It should contain everything they need to get started and often includes the company's "welcome swag," such as branded supplies and apparel
- ❑ Perform introductions with the relevant manager and team members
- ❑ Arrange an onboarding meeting with HR and provide a space in which the new employee can ask any questions they may have
- ❑ Give the new hire a little personal time to settle in and complete basic onboarding tasks

Day One Settling In

- ❑ Organise for the new employee to have lunch with their manager or members of the team they'll be working closely with
- ❑ Partner the new employee with an experienced team member that will act as a suitable mentor
- ❑ Run through the “starter list” to ensure that the employee has everything they need to get started
- ❑ Provide a more detailed account of what the employee will be doing for the rest of the week and what you would like them to achieve

Making the most of the first week

- ❑ Schedule regular check-ins with the employee
- ❑ Send out a welcoming department-wide new hire announcement
- ❑ If possible, introduce new hires to individuals higher up the hierarchy and give them an opportunity to talk
- ❑ Define and set out the employee's regular tasks and key performance indicators. Make sure they understand how they'll be appraised and what's expected of them
- ❑ Take some time to talk with the employee about their future. How can they progress? What awaits them? What do they want from their time at the company? What are their professional interests?

Offer training to bring your new hire up to speed

- ❑ Dedicate the first week to training - you should already have a carefully-considered training programme in place
- ❑ Focus on essentials first, eg. company rules, safety regulations, code of conduct etc.
- ❑ Provide plenty of opportunities to ask questions and ensure lines of communication are always open
- ❑ Ease the new employee into the role by setting starter assignments to complete in between training sessions

Employee engagement is all-important

- ❑ Schedule check-ins for the next three months. It's common for managers to organise a 30-day, 60-day and 90-day check-in with new employees
- ❑ Send an employee onboarding survey so that the hire can give you feedback on the onboarding process. Honesty is important, so emphasise that you're looking for constructive criticism that can help you improve the process for future hires
- ❑ Encourage the employee to meet a wider range of people from across the business. This could take the form of informal meetings or lunch dates
- ❑ Consider how you'll reward the employee's good work or progress over the first months of their employment

Think about long-term teambuilding

- ❑ Organise team-building events that will help new hires integrate into the team
- ❑ Arrange social events just for employees - allowing them to get to know each other in a more relaxed environment and without the presence of managers
- ❑ Think about the ways you can tail-off the onboarding process. The extensive support the employee initially receives will need to be wound down as they settle in but you can't do so all at once.