**ONBOARDING CHECKLIST**

**BEFORE THE START DATE**

1. Call the employee to confirm:

Start date, time, place, dress code.

1. Remind them to:

 Bring along any important documents to fill out forms on their first day.

1. Assign:

Necessary reading so that the employee can get up to speed on their job role and on how the company works.

A buddy or mentor to assist the employee with any job-related questions or issues they may encounter during onboarding process.

1. Prepare:

An onboarding package with introductory information: company information, employee handbook, benefits information, job description, contact names for the department, mission and vision of the company etc.

Onboarding forms for the employee to complete i.e. W-4, I-9, direct deposit, etc.

A concise training and development plan to be discussed with the new employee.

1. Schedule:

Meetings with critical people for the employee’s first weeks and add these to the employee’s calendar

1. Aspects regarding the actual work place and technology:

Organize work area: desk, chair, computer equipment, and provide basic office supplies.

Order keys/access card, business cards (if applicable).

Contact IT in order to set-up computer equipment and provide access to the company intranet, email, arrange telephone installation.

**FIRST DAY**

Welcome the new employee an introduce them to the team

Give them a tour of the building. Make sure they find the most important areas: kitchen, reception, bathroom, HR area, etc.

Hand over their orientation pack, which contains induction, training materials and benefits package.

Have a rather formal discussion about their job expectations and the goals they should pursue within the department.

Assign a mentor and introduce them to that person.

Take them out to lunch.

**FIRST WEEK**

Give the employee their first assignment/project.

Set up meetings for the employee with key people in management.

Explain expectations for the following 6 months.

**FIRST MONTH**

Set up check-in meetings to see if the employee has adapted to the company and the team

Make sure the employee attends required training and provide optional materials to read related to personal growth.

Inspire them to socially interact with the rest of the team.

**FIRST 3-6 MONTHS**

Review the employee’s progress, the performance and the completed tasks, in order to determine if training will be necessary from now on.

Request feedback from the employee, to see if their expectations matched the reality and if the onboarding process needs improvement.

Offer lasting support to make sure the employee reaches their full potential.