**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.