

New Employee Onboarding Checklist

BEFORE THE FIRST DAY

Desired outcome: New employee has everything he or she needs in advance to feel welcomed and “settled in” on his or her first day.

SCHEDULE & JOB DUTIES

- Send employee any paperwork to complete (e.g. I-9, background check authorization, etc.)
- Call the employee to:
 - confirm his or her start date and time,
 - explain the dress code, parking, etc., and
 - identify any computer needs
- Add any regularly scheduled meetings to the employee’s calendar (e.g. staff meetings, department meetings, etc.)
- Prepare employee’s calendar for first two weeks
- Plan and prepare employee’s first assignment

SOCIALIZATION

- Notify employee’s department and share the new employee’s start date, role within the department, and bio
- Choose a mentor to work with the new employee during their first 90 days
- Meet with the mentor and provide suggestions and tips
- Schedule lunch for new employee and mentor for his or her first day

WORK ENVIRONMENT & TECHNOLOGY

- Prepare a welcome packet, including:
 - welcome letter from supervisor or owner,
 - employee phone list,
 - job description,
 - campus map and parking information,
 - mission statement and values of the company,
 - company branded products (e.g. pen, hat, etc.), and
 - any information about the new employee’s specific department
- Stock the employee’s workstation with any supplies he or she may need
- Set up employee’s email
- Add employee to relevant email lists
- Add employee to shared drives and any necessary computer programs
- Schedule any relevant training sessions

FIRST DAY

Desired outcome: New employee feels welcomed, has everything he or she needs to begin working, and begins to understand his or her role and expectations.

SCHEDULE & JOB DUTIES

- Discuss any paperwork questions
- Review employee's job description, duties, and expectations
- Discuss and clarify the employee's first week's schedule
- Provide an overview of the employee's department
- Explain how the employee's role fits into the department and the company
- Review work schedule
- Explain overtime and time off policies and procedures

SOCIALIZATION

- Be ready to greet the employee as soon as they arrive
- Introduce new employee to other employees
- Ensure that the employee's mentor takes him or her out to lunch

WORK ENVIRONMENT & TECHNOLOGY

- Discuss parking
- Review safety and emergency information and policies
- Give the employee a tour of the building
- Explain how to get additional supplies
- Provide information on how to set up his or her computer
- Discuss required and recommended training and timeline

FIRST WEEK

Desired outcome: New employees begins to understand internal processes and performance expectations and begins to feel settled into his or her environment.

SCHEDULE & JOB DUTIES

- Give new employee his or her initial assignment (make it something small and doable)
- Debrief the employee after he or she has attended initial meetings and completed training and an initial assignment
- Touch base with the new employee every day
- Explain annual performance review process

SOCIALIZATION

- Arrange a personal welcome from the owner
- Schedule a department-wide lunch

WORK ENVIRONMENT & TECHNOLOGY

- Ensure the new employee has a fully functional computer and access to any drives and programs he or she needs
- Ensure the new employee knows how to use any computer programs he or she needs

FIRST MONTH

Desired outcome: New employee understands his or her performance expectations and continues to develop, learn, and build relationships.

SCHEDULE & JOB DUTIES

- Schedule regular one-on-one meetings
- Provide timely, ongoing, and meaningful feedback
- Encourage the employee to give his or her own feedback and be available to answer any questions
- Discuss performance and professional development goals

SOCIALIZATION

- Meet with employee and mentor to discuss first weeks and answer any questions

FIRST 90 DAYS

Desired outcome: Employee is becoming fully aware of his or her role and responsibilities, begins to work independently and produce meaningful work.

SCHEDULE & JOB DUTIES

- Continue to conduct regular one-on-one meetings
- Meet for an informal three-month performance review
- Continue to give employee challenging, but doable, assignments
- Create written performance goals and professional development goals

SOCIALIZATION

- Bring employee to meetings so he or she continues to gain exposure to other employees and learn more about the department and company

WORK ENVIRONMENT & TECHNOLOGY

- Assign relevant continuing education program