

Employee Onboarding Checklist

Setting new hires up for success from Day 1

Pre-Employment Onboarding

The employee experience begins even before they set foot within your company. It isn't just about evaluating skills, it's also about creating a welcoming and transparent environment where candidates feel valued from the beginning. A positive interview and pre-onboarding helps to build trust and sets the tone for a long-term relationship.



Send the job offer and obtain acceptance signature



Send a welcome email including:

- Reminder of their start date and who they should report to on their first day
- A list of documents to complete before their first day
- Any documents the employee needs to bring on their first day (i.e. I-9 identification)
- What to expect on their first day—this can include parking or access information, an itinerary, dress code restrictions, lunch options, etc.
- Contact person and information for any questions they have prior to their first day



Prepare for their arrival/start date:

- Communicate with IT to assign licenses, image computers, and prepare permission levels, this may include security badges or keys to access the office
- Create onboarding and training plan, including scheduling "meet and greets" with key personnel
- Prepare employee's workstation (if in office)
- Announce employee to staff

Orientation

The employee's journey continues through their first day of orientation with your company. A strong orientation process helps new hires to feel welcome, supported and prepared to succeed. This is the time they will learn about the tools and resources available to permit them to grow and develop in their role. Proper orientation can significantly reduce turnover rates by providing new hires with a sense of belonging and feeling valued from day 1.

- ◻ Welcome the employee with a smile as they enter the space (remotely or in the office).
- ◻ Review the itinerary and collect and/or complete any outstanding new hire paperwork
- ◻ Introduce employee to their workstation (remotely or in the office) - ensure they have proper access and logins
- ◻ Introduce employee to your company, it's Mission, Vision and values. Explain the story behind the company and how it has evolved.
- ◻ Explain the benefit options available to your employee and when their enrollment period is, include pay periods and paydays.
- ◻ Review Company handbook and essential policies such as:
 - Code of Conduct
 - Attendance policies
 - Dress code policies
 - Anti-Harassment and discrimination policies
 - Confidentiality policies
 - Company specific policies
 - Use of company equipment and technology use
- ◻ Arrange a tour of the facilities or a virtual meet and greet with the team and key personnel
- ◻ Schedule time for new hires to meet with their supervisor or manager
- ◻ Provide some fun company swag!

Ongoing Training, Development and Feedback

Providing ongoing training, development and feedback to new hires is critical to ensure continuous growth, skill enhancement and alignment with company goals. Development opportunities keep employees engaged and motivated by showing them there is room to grow. Consistent feedback offers valuable insights for improvement, helps employees understand their strengths, and areas to focus on for improvement.

- Provide access to required and desired trainings
- Discuss what the next 30, 60, and 90 days look like—what is the employee expected to learn? What expectations will they need to meet?
- Follow up with employee surveys, and check-ins with the employee and their supervisors during the 30, 60, and 90 days and six months and a year. Survey questions can include things like:
 - Do you feel like you have all the tools and resources to perform your job successfully?
 - What challenges have you faced during your first 30 (or 60 or 90) days?
 - How well does your current role match the job description you were hired for?
 - Do you feel connected to your team? Your co-workers? Your supervisor? The Company?

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