

ONBOARDING CHECKLIST

11 Steps To Success

Complete this checklist to ensure your new employee, whether they are based in the office or working remotely, hits the ground running and feels part of the team straight away!



1. **Get all necessary paperwork signed before their first day** - electronic signature software allows this to be easily done
2. **Send them their benefits options to choose from in advance** - this is a great way to make them feel valued
3. **Set them up so they can access your online portal, familiarise themselves with it and read engaging content** - you can do this as soon as they accept the offer, just send their logins via email
4. **Have someone personally greet them** at reception and show them around the office, introducing them to as many people as you see fit
5. **Arrange for them to receive a personalised welcome/congratulations note**, or a recorded video message, from their manager when you provide them with first-day information such as a new employee handbook, who to ask for upon arrival and more details about their role

6. **Make sure that their phone, computer and desk are all set up properly** and ready for their arrival - if they're working remotely, make sure everything is couriered to them well in advance of their start date
7. **Have tailored training** relevant to their specific role as well as general company training - but be careful not to overwhelm them with too much information, take a gradual approach
8. **Create a 'new hire community'** where all recent recruits from across the entire business can get to know each other - for remote workers, you could set up an online community on social media
9. **Match them up with a mentor** in the business who they can go to with any workplace related queries - a 'buddy scheme' an excellent way of encouraging cross-team interactions for new employees
10. **Pre-arrange regular catch-ups** over the first few months so you can closely monitor how they are settling in - this also allows you to give feedback on their early contributions and reinforces how much you value them as a recent addition to the team
11. **Ask for their feedback** on the process so you can identify areas of improvement - sending out anonymous surveys means you are more likely to receive honest responses