This extensive and detailed new hire checklist will help your company consistently deliver a high-quality onboarding experience to the new talent you bring on board. It will also protect that large investment in associated hiring costs you have committed to. Follow through for better returns!

PRIOR TO EMPLOYEE'S START DATE:

HR Paperwork

- ☐ Resume
- ☐ Application
- ☐ Background checks
- ☐ Any assessments—e.g., Chally; DiSC
- ☐ Degree verification
- ☐ Hiring proposal
- ☐ Signed offer letter
- ☐ Applicable federal and state forms
- ☐ Direct deposit
- ☐ Other applicable paperwork for position

Work Area/Environment

- ☐ Should be ready and clean (includes inside desk drawers)
- ☐ Welcome letter or welcome email to new hire
- ☐ Needed supplies
- ☐ Welcome packet at desk
- ☐ Employee handbook
- ☐ Branded items (e.g., mug, shirt) or welcome gift
- ☐ Phone
- ☐ Computer
- ☐ Email setup
- ☐ Company org chart
- ☐ Company contact list

Schedule, Job Responsibilities and Expectations

- ☐ Start date, time, parking guidelines, dress code
- ☐ Determine mentor or "buddy" for socialization and guidance
- ☐ Have calendar/schedule prepared (2 weeks is ideal but not always possible), e.g., shadowing, training meetings
- ☐ Plan first assignment
- ☐ Orientation dates and times

Socialization/Communication

- ☐ Alert receptionist for a warm welcome
- ☐ Know who will escort the person

- ☐ Inform company/department of new hire
- ☐ Arrange pertinent meetings for first day
- ☐ Plan lunch for first day and select who will join (senior management is always a good choice)

Some Considerations

- ☐ Have new hire begin mid-morning
  - Eliminates first-day traffic concerns
  - Gives those who will be engaged with new hire time to clear up morning tasks
- ☐ Start new hire midweek—less stress for new hire as well as others working with new hire

DAY ONE:

Paperwork

- ☐ Complete as needed
- ☐ Give new hire time to review welcome packet
- ☐ Review pertinent information
- ☐ Size of organization will determine if speakers from other departments are needed on an orientation day—if a separate orientation day is a part of the onboarding

Work Area/Environment

- ☐ Give employee access item(s) (keys/card) and usage information
- ☐ Provide emergency and safety information
- ☐ Review any parking logistics if applicable
- ☐ Provide a tour of the facility—e.g., lunch or break room, restrooms, supply room
- ☐ Technology access
- ☐ Review company protocols
- ☐ Help set up voicemail
- ☐ Assist with logins

Schedule, Job Responsibilities and Expectations
(Some addressed on first day, but continues for first week)

- ☐ Explain upcoming training
- ☐ Clarify first week schedule
- ☐ Review job description; set expectations and goals

- [ ] Continue this process during the first 90 days at scheduled intervals to ensure expectations are clear
- [ ] Go over the company orientation schedule and agenda

FIRST WEEK:

Paperwork
- [ ] Complete needed paperwork items
- [ ] Identify longer lead time paperwork items

Schedule, Job Responsibilities and Expectations
- [ ] Review probationary period if applicable
- [ ] Explain performance reviews
- [ ] If job requires shadowing clarify schedule
- [ ] Describe how job fits in department and contributes to organization

Socialization/Communication
- [ ] Check in briefly everyday
- [ ] Provide timely, meaningful, ongoing feedback
- [ ] Elicit feedback to affirm comfort level
- [ ] Plan meeting with manager/supervisor to share management style

Training & Development
- [ ] Internal decision-making process
- [ ] Reporting structure
- [ ] Workplace conflict procedures
- [ ] Training schedule—based on job
- [ ] "Shadowing" schedule (suggest other departments to be part of first 90 days of onboarding)
- [ ] Company's products and services
- [ ] Overview of industry and where your business fits in
- [ ] Company's mission statement and values
- [ ] Company goals and strategic objectives
- [ ] Company culture

AS ONBOARDING CONTINUES, EARLY FOLLOW-UP IS CRUCIAL:

- HR or managers should meet with the new hire at predetermined times (two weeks; a month; three months…etc.) for each job's complexities.

- Ask the new team member how things are going and how well they understand their roles, goals and the business.
- Ask whether any questions have not been answered.
- Value of training programs: Helpful? Address right areas? Worth time spent? What would help improve training?

FIRST 30 DAYS:

Schedule, Job Responsibilities and Expectations
- [ ] Schedule and conduct regular one-on-one meetings
- [ ] Continue to provide everyday feedback
- [ ] Review job description
- [ ] Discuss performance and professional development goals
- [ ] Continue adding assignments

Socialization/Communication
- [ ] Continue introducing employee to key people
- [ ] Be sure employee attends relevant events
- [ ] Arrange for employee and mentor/buddy meeting to review first weeks and answer questions

Training & Development
- [ ] Ensure training schedule is being followed

FIRST 90 DAYS:

Schedule, Job Responsibilities and Expectations
- [ ] Continue scheduled meetings to confirm understanding and meeting deadlines
- [ ] Have informal 3-month check in
- [ ] Create performance goals and professional development goals
- [ ] Employee should feel fully integrated into company and operating at their full workload
- [ ] Identify weaknesses and develop plan to resolve to performance improvement plan or terminate employment before investing in too many resources that won't ultimately be effective.

Socialization/Communication
- ☐ Have an appropriate person take employee out to lunch for informal conversation on how things are going
- ☐ Determine whether it is time to involve employee in other department meetings that may apply to their job

Training & Development
- ☐ Seek input about ongoing onboarding process:
- ☐ What is going well?
- ☐ What could the department do better or differently?
- ☐ What does the person need for their job that they don't have?

FIRST 6 MONTHS:
- ☐ Conduct 6-month performance review
- ☐ Review performance goals and professional development progress
- ☐ Continue to elicit feedback in all areas

FIRST YEAR:
- ☐ Annual review
- ☐ Celebrate successes and recognize employee's contributions
- ☐ Discuss if employee's skills and knowledge are being effectively used
- ☐ What's working?
- ☐ What do they need more of?
- ☐ Discuss future professional development opportunities