New Hire Checklist

for

[Your Company Name]

Customize this list to suit your organization

One Month Before Starting

* Send offer letter
* Send employment contract
* Provide details of start date (+ time and address for place of work)
* Order any equipment the employee will need (eg computer, desk, phone, etc)
* Order any supplies the employee will need (eg business cards, uniforms, etc)

One Week Before Starting

* Send welcome letter and [employee handbook](https://blog.hrpartner.io/best-employee-handbooks/) (include their arrival time, address and map, parking / public transport, dress code, and plan for their first day)
* Enter employee records in your [HR system](https://www.hrpartner.io/) – including their name, address, contact details, position, start date, compensation, etc.
* Send a new hire announcement message to the company announcing the new hire’s start date and encouraging everyone to welcome them onboard
* Set up the employee’s office space
* Create an email address for the employee
* Arrange computer and software system login details
* Select and notify an onboarding buddy to welcome the new hire (or their direct manager can also perform this role)
* Create a plan for the employee’s first week – arrange for them to spend time with key people or departments
* Set date and reminder for probation period and review

Day One

* Welcome new employee
* Show them to their working area and ensure they have everything they need
* Give the employee any equipment they need and explain the policies related to those (key card, phone, etc)
* Introduce the employee to their onboarding buddy
* Give the employee an orientation tour of the office (be sure to show them restrooms, kitchen, parking, office supplies, etc)
* Review job duties and expectations
* Tell them how success is defined in their role
* Ensure employee can access their email and other core systems (chat, project management, role-specific systems)
* Collect details and paperwork from the employee (eg tax forms, bank account details, other details needed for your [HRIS](https://www.hrpartner.io/))
* Explain the plan for the employee’s first week and discuss with them
* Ensure employee has submitted all forms and information for payroll
* Explain how the timing of payroll works and any other compensation
* Explain any other benefits (eg insurance, bonuses, perks to take advantage of, etc)

Week One

* Encourage the employee to send out an introductory message to the company (show them past examples to reduce the stress of this)
* Get to know the immediate team – perhaps a team lunch or introductory meeting where each team member gets to explain their role and talk about themselves
* Go over the employee handbook
* Review other relevant company policies (eg code of conduct, safety policy, etc)
* Assign any required reading / training
* Introduce the employee to other departments & explain how the company works
* Introduce the employee to senior executives
* Overview upcoming key company projects
* Assign the employee their first goal or project/s
* Ensure employee is aware of key upcoming dates, social events, etc
* Check in with employee every day during their first week – ensure they meet with key people and everything is working fine
* Setup weekly 1:1 meetings with the new hire’s direct manager

Month One

* Review progress on their first goal or project/s
* Check employee payroll is running smoothly
* Conduct an informal performance review
* Give more of an overview of the company, including the mission and vision, company values, key milestones, company goals, etc
* Discuss how the employee’s role fits into the bigger picture – revisit the job duties and expectations of the role, and especially, the success metrics
* Discuss and set next projects and goals
* Invite employee to connect on company social media accounts
* Get employee set up with company training sessions

3-6 Months

* Conduct probationary performance review
* Discuss and set new projects and goals
* Discuss career development plan
* Schedule next performance review
* Collect feedback from employee on onboarding process