

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 (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 – 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)
- ☐ 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