leadr

New Hire Onboarding Checklist

Welcome Packet Checklist

Make your New Employee Feel Welcome

A comprehensive welcome packet can be as simple as an email to your new hire to make sure they feel welcome and fully prepared for day one, whether starting in the office or remotely. Make sure your welcome packet includes the following:

- [ ] A warm welcome, a handwritten note or email if your new team member is remote.
- [ ] The starting date, time and location
- [ ] Provide the phone number and email of their contact person
- [ ] Explain the dress code, if there is one
- [ ] Employee Handbook
- [ ] Parking information (if applicable)
- [ ] Staff contact list
- [ ] Organizational mission, vision, values
- [ ] Organizational chart for the team they will be on
- [ ] Provide a list of the documents they should bring
- [ ] Include schedule breakdown of their first day

Pre-Onboarding Checklist

Make sure you are prepared for their first day.

Set your new hire up for success by making sure everything is ready for them on day one. Make sure to get the items below completed at least one week before your new hire starts.

- ☐ Communicate to your team that your new hire has accepted the position. Make it a celebration!
- ☐ Order all necessary equipment
  - ☐ Keys/fobs/security/identity badges
  - ☐ Business cards
  - ☐ Computer
  - ☐ Phone
  - ☐ Headset
- ☐ Create their accounts in the HR system
- ☐ Create essential software accounts
  - ☐ Email/Voicemail
  - ☐ Other tools such as CRM, Leadr, Company Chat, HR portal access
- ☐ Prepare HR related documents
  - ☐ Health insurance enrollment
  - ☐ Payroll / direct deposit registration
  - ☐ Tax forms
  - ☐ Retirement paperwork
- ☐ Add new hire to calendar invites for onboarding events/meetings

First Day Checklist

Set out everything that should be done during the first day

The first day at a new company can be stressful, but you can do a lot to make sure your new hire has an amazing experience.

- ☐ Be sure to greet the new employee at the door
- ☐ Introduce the new employee to their colleagues and department
- ☐ Show the new employee their workstation
- ☐ Organize a work tour. Hit the essentials: entrances, restrooms, kitchen, common room
- ☐ Ensure that they can log in to their station and all equipment is working properly
- ☐ Provide access to Leadr and assign them some learning objectives
- ☐ Check that all credentials and accesses work
- ☐ Have a welcome lunch with the new employee and their team
- ☐ If possible, have a one-to-one meeting at the end of the day. Make sure to add the agenda into the Leadr so that they get used to using the tool.

First Week Checklist

Help the new employee and not overwhelm them

Week one is all about conveying new processes and expectations. Find ways to build connection and fun into this week.

- ☐ Provide access and inform them where to find company policies
- ☐ Introduce the employee to your company and company culture through a series of welcome meetings with department heads.
- ☐ Set short term goals with your new hire to give them a clear idea of what to work on
- ☐ Check-in frequently to ensure that all equipment and software needs are met
- ☐ Instruct the new employee about security and fire measures
- ☐ Organize and invite the new employee to participate in team-building activities
- ☐ Set a one-to-one meeting at the end of the week. Be sure to add an agenda in Leadr.
- ☐ Set a recurring on-to-one meeting to happen at least twice a month
- ☐ Make sure you know how to celebrate your new hire
    - ☐ Add birthday to a calendar so you don't miss it
    - ☐ Have them complete their People Profile in Leadr

First 30-days Checklist

Check-in and assessments

This crucial period often is an indication of the hire's potential for long-term success in their new role. A checklist for a healthy first season in a new role can help identify if an employee is set up for longer-term success.

- ☐ Create a first month onboarding survey in Leadr for them
- ☐ Set a meeting with the department head about the employee's progress
- ☐ Level set with the employee on expectations for the next 30, and 60 days
    - ☐ Have the employee create goals insider leadr based on these expectations
- ☐ At the start of your next 1:1, check the employee's feelings about the job
- ☐ Invite the new employee to participate in activities for team members
- ☐ Plan and schedule a three month and six month survey in Leadr
- ☐ Add candid conversation into your one-to-one meetings, if you need ideas use the Topic Suggestions inside Leadr to get started

Need a little more help? Check in with our Leadr Customer Success Team. We are always here for you when you need us!