

# New Employee Orientation & Onboarding Checklist

<b>Name:</b>	<b>Office Location/Branch:</b>
<b>Position:</b>	<b>Start Date:</b>
<b>Contact info:</b>	<b>Manager:</b>

Stages	Tasks	Status
<b>Prior to First Day</b>	Send new employee important information/welcome letter (where, when, who to report to first day).	
	Advise staff of the new employee's name, position, and start date.	
	Assign a buddy or mentor as go to for new employee orientation.	
	Arrange for a workspace (furniture, equipment, supplies).	
	Set up systems (computer, phone, access, passwords).	
	Arrange for access (office & desk keys, security pass).	
	Add new employee to organizational lists (organizational chart, email, phone).	
	Make a copy of job description & procedures manual.	
	Gather information to give new employee on first day (reports, reference material).	
	Arrange schedule to spend time with new employee first day (info, questions, agenda, orientation & training plans).	
<b>First Day</b>	Review pertinent information on new employee from hiring process (resume, assessment reports -coaching tips, thinking style, behavioral, interests).	
	Welcome new employee and introduce to coworkers, buddy/mentor.	
	Outline the orientation process for the day.	
	Give the new employee a tour of the assigned workspace and the rest of the office/facility.	
	Overview of the organization, organization chart, position and its relationship to other positions in organization.	
	Review the employee's job description, duties, expectations, probationary period, and administrative information.	
	Give specific outcomes for the first day (set up desk, look at the organization's website, review of a specific document).	
	Identify the work that needs to be accomplished in the first week.	
	Give new employee reports/ information needed for the job and explain what each item is.	
Give time to set up workstation (computer, voicemail, passwords, supplies).		

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Stages	Tasks	Status
<b>First Week</b>	Schedule and conduct regularly occurring one-on-one meetings and question/feedback opportunities.	
	Review procedures (manual, protocols) and performance management and compensation systems.	
	Discuss performance and professional development goals and expectations.	
	Ensure new employee is signed up for necessary orientation sessions and training.	
	Give new employee additional assignment(s).	
	Meet with employee and buddy/mentor to review first week and answer questions.	
<b>First 3 Months</b>	Continue having regularly occurring one-on-one meetings.	
	Continue giving employee assignments that are challenging yet doable.	
	Create written performance goals and professional development goals.	
	Have employee "shadow" you and other key staff on the job/key events to gain exposure and learn more about department(s) and organization.	
	Have a check-in with the employee and buddy/mentor.	
	Ensure employee attended orientation sessions & training and ask for feedback (share findings).	
	Conduct three-month performance review at end of probationary period.	
<b>First 6 Months</b>	Continue having regularly occurring one-on-one meetings.	
	Create opportunities for employee to attend or be involved in activities outside of his/her work area and relevant industry events.	
	Meet with employee and buddy/mentor at the end of their structured relationship period to discuss how things went and what else would be helpful /needed.	
	Conduct six-month performance review to discuss experience to date (progress on performance and professional development goals, extent expectations and skills/knowledge being utilized, successes/challenges, additional needs).	
<b>First Year</b>	Continue having regularly occurring one-on-one meetings.	
	Continue providing regular informal feedback.	
	Conduct annual performance review (feedback/discussion: performance and professional development goal achievement, expectations, onboarding experience, successes/challenges).	
	Celebrate successes and recognition of employee's contributions.	
	Begin discussions on coming year (organizational plans, expectations, goal setting).	

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