New Staff Checklist (Office Staff)

Pre-Onboarding

Your Pre-onboarding process starts the minute after your candidate accepts your offer. Starting from a thank you email for accepting your offer to keeping them engaged till their first day makes up your pre-onboarding phase.

Pre-Onboarding Checklist

☐   Send a thank you Email after the candidate has accepted the offer.

☐   Inform the Manager and Team of the candidate's acceptance of the offer

☐   Setup a tentative joining date

☐   Confirm the date with the new hire's Manager, and team

☐   Email the new hire informing the joining date for confirmation

☐   Prepare the paperwork and documents required for the new employee.

☐   Send out the paperwork required to complete the joining formalities.

☐   Remind the new hire to complete the paperwork via Email

☐   Inform the IT team to set up a new device, mobile phone, and all necessary permissions and credentials ready.

☐   Inform the Admin Team to keep ready a workstation

☐   Email the new employee about their first day with necessary guidelines, instructions, and help materials

☐   Assign an onboarding buddy for the new employee and introduce them to each other before Day 1.

☐   Create Employee Profile and update all information and give them credentials to our database for work.

☐   Introduce them to your organization's learning Management system to complete the required courses before they start work.

First Day

The first day for a new employee is very crucial as it will make a lasting impression of your organisation in their mind. This will influence their decision to stay or leave your company big time. So the first day must not go just well, but excellent. Here is a checklist of items you can execute to ensure that it does.

First Day Checklist

- ☐ The HR Manager to send out a welcome message through Email, connect Team and WhatsApp to all employees (include care staff) with their photo to announce the arrival of a new team member on their first day
- ☐ Ensure the employee reaches your office with no hassle
- ☐ Inform Security / Receptionist and provide permission to enter the premises
- ☐ Give the employee a bunch of welcome goodies like a T-shirt, Laptop Bag, Water Bottle, Notepad, Pen, and other company goodies like a Mobile Phone Holder with a Logo.
- ☐ Give them their ID Badge, orientation Schedule and introduce them to their Buddy to guide them.
- ☐ Arrange a lunch date for the new employee with their manager/buddy as per availability
- ☐ Ensure they finish any other paperwork you required them to do on their first day.
- ☐ Plan the office Walk-through and also show them the necessary places like the kitchen, HR room, Training room, Restrooms, Parking Space, Play Area, etc.,
- ☐ Ensure they collect their working device and other required equipment/software from the IT Team
- ☐ Make sure they visit their workstation and drop a Hi to their team.
- ☐ Clarify any doubts they have and give them instructions for the next day

First Week

Yes, the process does not directly skip to months later where you ask, "Is everything good?" to the employee. Continue to hand-hold them during the first week to ensure they feel truly at home in their new role.

The first week will majorly focus on getting to know the company, its values, culture, goals, and how they will fit in it. It will also include getting to know more about their role and plans for the next two to three months.

You can also introduce them to any of the courses or tests you have as part of your onboarding process here.

First Week Checklist

- ☐ Arrange for Culture Meetings and Company Policy/ Business Goal Sessions
- ☐ Have the new employee meet up with essential business heads/coaches of the organisation
- ☐ Set up a 1-1 with the employee and their line manager
- ☐ Have the Manager or mentor of the Employee set their goals and start assigning work/courses/assignments as required.
- ☐ Set up a time to meet them and address any of their concerns by the end of Week 1.

The Post-Onboarding Checklist

30th Day

- ☐ Set Up a 1-1 with the New employee asking for their feedback on the onboarding process, their team, and their manager
- ☐ Also, ensure to go through the goals and assignments they are going to work on
- ☐ Have an open talk about what they exactly feel and communicate it right to their managers.
- ☐ Set Up a 1-1 with the new employee's manager to get his/her feedback on the employee as well
- ☐ Make a general assessment of the new employee
- ☐ Plan the revised goal and work approach with the manager and the employee based on the feedback received.

60th Day

- ☐ Set Up a 1-1 to see how the employee liked the changed approach or how the existing system has been after two months
- ☐ Set Up a 1-1 with the new employee's manager to get the feedback on the employee and also on the alignment based on the last meeting
- ☐ Plan the revised goal and work approach with the manager and the employee based on the feedback received.
- ☐ Make a general assessment of the new employee.
- ☐ If the employee thinks they fit for some other team or role, work on solving the challenge.

90th Day

☐ Send out a satisfaction survey to the employee on their onboarding, job, time at the company so far, and their manager and team. Include questions on if they are learning new things in this role and if they find it challenging etc.,

☐ Set Up a 1-1 based on the survey response to employees who are mostly dissatisfactory.

☐ Communicate the results to their manager for all new employees to help the manager better understand the employee's mindset and progress accordingly.

☐ Ask if the employee wants a meeting and set up to discuss any queries they may have.

☐ Based on the collective feedback, implement changes in your onboarding plan.