

New hire checklist

The welcome email checklist

- Warm greetings:** Craft a personalized welcome email introducing the new hire to the team and the company culture.
- Essential information:** Provide details about the first day, including location, time, dress code, and necessary documents.
- Tech set-up:** Offer clear instructions for setting up email, access to company tools, and necessary accounts.
- Team introduction:** Include a brief overview of the new hire's team members and their roles.
- Company values:** Highlight key company values that resonate with the organization's culture.
- Welcome note:** Attach a short message from the CEO or a team leader welcoming the new hire.
- Buddy assignment:** Assign a buddy to help the new hire navigate their first weeks and answer questions.
- Parking information:** If applicable, provide details about parking arrangements and any necessary permits.

Pre-onboarding checklist

- New hire paperwork checklist:** Ensure all legal and administrative documents are ready for the new hire's review and signature.
- Training materials:** Share relevant training materials or pre-reading resources to help them hit the ground running.
- Access arrangements:** Coordinate system access, building entry, and any required security clearances.
- Emergency contacts:** Request emergency contact information from the new hire for safety purposes.
- FAQ document:** Provide a document addressing common questions about the onboarding process.
- Virtual tour:** Share a virtual tour of the office space or workplace environment.
- Dress code details:** Provide specific guidelines for the dress code, including any variations for different days or occasions.
- Onboarding schedule:** Share a detailed agenda for the first few days, including training sessions and meetings.

First-day checklist

- Warm welcome:** Have someone ready to greet the new hire and give them a tour of the office or virtual workspace.
- Introduction sessions:** Schedule introductions with team members, supervisors, and key stakeholders.
- Equipment handover:** Provide necessary tools, devices, and ensure the workstation is ready.
- Welcome kit:** Prepare a small welcome package with company-branded merchandise and essentials.
- Office etiquette:** Share a document outlining office etiquette and norms to help the new hire assimilate smoothly.
- Coffee or lunch:** Plan a casual coffee or lunch session with the new hire's immediate team members.
- IT support contact:** Provide the contact information for IT support in case of any technical issues.
- Company policies:** Share key company policies and procedures that the new hire should be aware of.

First-week checklist

- Role and expectations:** Conduct comprehensive orientation sessions about the job role, responsibilities, and performance expectations.
- Company overview:** Offer insights into the company's history, mission, values, and long-term goals.
- Initial tasks:** Assign tasks that allow the new hire to apply their skills and get a feel for their role.
- Peer networking:** Arrange informal meetings with peers from different departments to encourage networking.
- Daily check-ins:** Establish brief daily check-in sessions to address any immediate concerns or questions.
- Skill assessment:** Administer a brief self-assessment to understand the new hire's strengths and areas for development.
- Online resources:** Provide a list of online tools and resources available for learning and professional growth.
- Performance metrics:** Discuss the key performance indicators (KPIs) by which the new hire's success will be measured.

First-month checklist

- Feedback channels:** Establish regular feedback sessions to address any questions or concerns the new hire may have.
- Training plan:** Outline the training schedule for the upcoming months, including any workshops or courses.
- Mentorship match:** If applicable, pair the new hire with a mentor who can guide them through their professional journey.
- Cross-functional exposure:** Arrange shadowing opportunities with other departments to broaden their understanding.
- Goal setting:** Collaborate with the new hire to set clear performance goals for the first few months.
- Social event:** Organize a team-building or social event to help the new hire further integrate into the team.
- Resource person:** Identify a specific person the new hire can reach out to for questions related to office resources.
- Learning budget:** Inform the new hire about any budget allocated for their professional development and learning resources.