

EMPLOYEE ONBOARDING CHECKLIST

Effective onboarding is the process of building a sustainable connection. It starts long before the first day of the job, and lasts longer than the probationary period. This list outlines all the key tasks and milestones needed to engage and retain a committed, motivated and effective employee- as efficiently as possible.

RECRUITMENT & CONFIRMATION

- Provide an accurate and polished position description, which describes both the role and the company (including values, vision, mission and organisation chart), where the role fits, and how it contributes
- Ensure the recruiter (whether internal or external) is well briefed and has a meaningful and customised list of questions: with a focus on scenarios, examples and competence based “thinking” and problem-solving questions
- Keep feedback and appointment process smooth, clear crisp and timely, with a clear and accessible contact person for any questions
- As the candidate progresses, continuously update and tailor questions and skill-testing tasks to build up a clear picture of the individual’s skills, working style and cultural fit/suitability
- Upon confirmation, provide accurate, clear contract as well as associated documents (eg confidentiality, conflict of interest, key policies, glossary of key in house technical terms), as well as payroll information, for signing

PRE- COMMENCEMENT

- Line manager (and/or next level manager) makes contact to say welcome and congratulations
- Using knowledge gained from recruitment process, HR works with recruiter and line manager to tailor induction program specific needs/style of new employee as well as role priorities
- Ensure IT and desk set up, with all necessary programs, passwords, tools, software, phone etc
- Set up first fortnight of appointments directly in employee’s calendar
- Welcome pack from HR sent to employee - contract, important information about first day, first meeting, contact person, induction timetable etc
- Email pre-reading pack (if relevant), information about team structure, key people and their roles, key projects, background information about organisation and role
- Emails to work team and to all staff announcing appointment, introducing candidate and start date

FIRST DAY

- Ensure employee greeted promptly
- Tour of office, key introductions (team and others)
- Safety Induction, OHS, Emergency Procedures
- Meet with HR to go through contract, general information, ensure all in order, answer questions
- End of day check in to gain feedback on first day, answer questions, set up for next day etc.

FIRST WEEK

- Key contact person/buddy/mentor nominated from within team
- Key team members meet with employee
- Key internal stakeholders meet with employee
- Line Manager/team colleague accompanies employee to key external appointments
- Line Manager sets first tasks/projects for employee, with clear deliverables and timelines
- Line manager meets briefly with employee at beginning and end of each day
- HR meets with employee at conclusion of first week, schedules mid-point probationary review, explains process and documents.

FIRST MONTH/S

- Line manager sets work plan/key tasks and priorities, including deliverables/timeframes.
- Line Manager sets weekly catch up/work in progress meetings
- Key contact person/buddy accompanies employee to at least one social event
- Mid Point Probationary review completed
- HR and Line Manager use results to tailor action plan for remainder of probationary period (if required)

PROBATIONARY REVIEW

- Forms provided to employee in advance, with HR available to assist as required
- Review completed as per schedule
- Results discussed between HR and Line Manager
- Confirmation meeting between Line Manager and employee, performance goals set for next review period

POST PROBATION

- Maintain regular WIP/Catch up Meetings with Line Manager
- Line Manager to provide regular monitoring feedback in relation to performance and targets
- Maintain contact with Buddy/mentor as required

PERFORMANCE REVIEW

- Line Manager and/or HR to work through process with employee, and assist with document completion as required
- Buddy/mentor also available for advice/support as required
- Review and seek feedback on both performance and employee experience during this first review cycle - check for match with expectations, position description, delivery etc
- Ensure appropriate, documented targets and development plan in place for next cycle

FIRST ANNIVERSARY

- Meeting/review with Line Manager and/or HR to seek feedback on first year with company, check on employee experience, ongoing support and development needs etc
- Acknowledgement letter from CEO/Line Manager/HR