

NEW EMPLOYEE ONBOARDING CHECKLIST

Effective onboarding should help new employees understand the organizational context and performance expectations. If implemented, the result should be a shortened learning curve for the onboarding executive and will enable them to perform at their full potential.

Often when a newly hired executive or senior manager leaves their role prematurely or is terminated with or without cause for poor performance, the root causes of the issues can be traced back to a communication breakdown which was ongoing from the very beginning of the employment period.

One of the best investments an employer can make in a new hire is in the onboarding process. It is proven that formal onboarding processes have a significant effect on the motivation, development and in fact the retention and overall performance of new employees.

Employers who implement formal onboarding processes enjoy the following benefits:

- Hires who lead the organization in the direction it wishes to go
- Hires who graduate from getting the familiar phase to the contribution phase much sooner and with less bumps and bruises
- Motivated and enthusiastic employees who feel they have been provided clear direction, realistic expectations and support
- Hires who feel a sense of increased loyalty to an employer which takes the time to invest in their success by implementing a formal onboarding process, resulting in increased retention rates

Remember that an employee's performance and success most often mirrors the performance and overall success of the organization.



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CATEGORY 1: PRIOR TO START DATE			
EMPLOYMENT AGREEMENT (SIGNED BY BOTH PARTIES)		CREDIT CHECK (FOR ANY EMPLOYEE WITH A SIZEABLE BUDGET)	
REFERENCE CHECKS (MINIMUM OF 3)		COMPANY LITERATURE	
CRIMINAL, CREDIT, EDUCATION BACKGROUND CHECK		COMPLETE A BEHAVIOURAL PROFILE AND DISTRIBUTE IT TO KEY STAKEHOLDERS TO HELP FACILITATE A BETTER UNDERSTANDING OF THE EMPLOYEE	
AN ORGANIZATIONAL CHART AND MAP OF THE BUILDING(S)		COMPREHENSIVE EMPLOYEE HANDBOOK THAT DETAILS COMPANY POLICIES, PROCEDURES AND STANDARDS	
GLOSSARY OF INDUSTRY – OR COMPANY – SPECIFIC TERMINOLOGY AND ACRONYMS		LIST OF INTERNAL CONTACTS FOR INQUIRIES RELATED TO PAYROLL, BENEFITS, TECHNICAL SUPPORT, ETC.	
ORDER EMPLOYEE’S BUSINESS CARDS		ASSIGN AND CONNECT THE EMPLOYEE WITH A SENIOR MENTOR “BUDDY” OUTSIDE OF THE DIRECT REPORTING RELATIONSHIPS	
PROVISION OF INFORMATION OF ANY PRESSING MATTERS WHICH THE NEW EMPLOYEE SHOULD BE UP TO SPEED ON QUICKLY		BRIEF ONE HOUR WELCOMING PHONE CALL FROM IMMEDIATE SUPERVISOR TO CONGRATULATE AND DISCUSS ONBOARDING GAME PLAN	
FOR ABORIGINAL ORGANIZATIONS OR ANY ORGANIZATION WHERE CULTURE AND PROTOCOLS ARE PRESENT: IF POSSIBLE, ARRANGE FOR A CULTURAL ADVISOR OR PERHAPS RECOGNIZED COMMUNITY ELDER TO MEET WITH THE NEW EMPLOYEE TO DISCUSS THE ORGANIZATION’S AND THE COMMUNITY’S UNIQUE HISTORY, CULTURE, BELIEFS SYSTEMS AND PROTOCOLS		TECH SET-UP: <ul style="list-style-type: none"> • COMPUTERS • COMPANY EMAIL • COMPANY SOFTWARE/ DATABASE I.E. CRM • PRINTER • TELEPHONE 	

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CATEGORY 2: START DATE RESPONSIBILITIES			
ON THE BUSINESS DAY PRIOR TO THE NEW EMPLOYEE'S ARRIVAL SEND A GENERAL EMPLOYEE EMAIL ANNOUNCING THE NEW EMPLOYEE'S ARRIVAL, ROLE AND BRIEF BACKGROUND (INCLUDE A PICTURE IF POSSIBLE)		HAVE HR OR IMMEDIATE SUPERVISOR OR ASSISTANT FACILITATE A TOUR COVERING THE MOST BASIC ESSENTIALS SUCH AS OFFICE, PARKING, WASHROOMS, COFFEE/LUNCH, EMERGENCY EXITS, FAX/COPIER, MAIL, ETC.	
SCHEDULED INTRODUCTORY MEETING WITH HR AND IMMEDIATE SUPERVISOR TO REVIEW THE ONBOARDING PROCESS, PLANS AND OBJECTIVES (IF THE IMMEDIATE SUPERVISOR IS THE BOARD OF DIRECTORS OR CHIEF & COUNCIL, HAVE HR PREPARE FOR AND FACILITATE THE MEETING WITH EITHER JUST THE CHAIR/ CHIEF OR THE ENTIRE BOARD/ COUNCIL PRESENT)		SCHEDULED MEETING WITH KEY STAKEHOLDERS FOR A FRANK AND OPEN DISCUSSION WITH THE EMPLOYEE TO CLARIFY AND UNDERSTAND: <ul style="list-style-type: none"> • CULTURAL IDENTITY • GENERAL EXPECTATIONS • SPECIFICS OF THE ORGANIZATION • KEY JOB FIT ISSUES 	
SCHEDULED NETWORKING APPOINTMENTS WITH KEY LEADERS AND STAKEHOLDERS		LIST OF KEY STAKEHOLDERS WITH CONTACT INFORMATION WHO THE NEW EMPLOYEE WILL NEED TO BE FAMILIAR WITH AND BEGIN BUILDING STRONG RELATIONSHIPS WITH	
FILL OUT EMPLOYEE BENEFIT FORMS		PLANNED INTRODUCTIONS WITH VARIOUS DEPARTMENTS/PARTS OF THE ORGANIZATION	
ENSURE EMPLOYEE SIGNS ALL APPLICABLE DOCUMENTATION		DIRECT DEPOSIT AUTHORIZATION FORM	

CATEGORY 3: FIRST WEEK			
WITH THE NEW EMPLOYEE, HR AND KEY STAKEHOLDERS INPUTS, CREATE A MUTUALLY AGREED UPON INDIVIDUAL ONBOARDING PLAN WHICH OUTLINES PERFORMANCE MEASURES FOR GOALS AND OBJECTIVES OF THE FIRST 3 AND 6 MONTHS OF EMPLOYMENT		SCHEDULED EXPERIENCES IN VARIOUS PARTS OF ORGANIZATION	
HR SHOULD CONTACT THE IMMEDIATE SUPERVISOR AND KEY STAKEHOLDERS TO RECEIVE AND DOCUMENT NEW HIRE FEEDBACK (VERY BRIEF CONTACT COVERING INITIAL IMPRESSIONS AND PERCEIVED STRENGTHS/WEAKNESSES)		SCHEDULED TIME WITH HR AND/OR IMMEDIATE SUPERVISOR LATE IN THE WEEK TO COVER ANY QUESTIONS OR CONCERNS OF THE NEW EMPLOYEE AND CHECK PROGRESS	

CATEGORY 4: FIRST MONTH AFTER START DATE			
HR SHOULD CONTACT THE IMMEDIATE SUPERVISOR AND KEY STAKEHOLDERS TO RECEIVE AND DOCUMENT FEEDBACK (10-15 MINUTE CONVERSATIONS COVERING INITIAL IMPRESSIONS, PROGRESS TOWARDS ACHIEVING THE GOALS AND OBJECTIVES OF THE ONBOARDING PLAN AND PERCEIVED STRENGTHS/WEAKNESSES)		SCHEDULED TIME WITH HR AND/OR IMMEDIATE SUPERVISOR TO COVER ANY QUESTIONS OR CONCERNS OF THE NEW EMPLOYEE AND CHECK PROGRESS AGAINST PERFORMANCE MEASURES AND GOALS OUTLINED IN THE ONBOARDING PLAN AS WELL AS IDENTIFY KEY STRENGTHS AND AREAS FOR IMPROVEMENT WHICH ARE ESSENTIAL TO THE ROLE'S MOST PERTINENT RESPONSIBILITIES, GOALS AND OBJECTIVES (THIS IS A CASUAL REVIEW/DISCUSSION)	

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CATEGORY 5: SECOND MONTH AFTER START DATE			
HR SHOULD CONTACT THE IMMEDIATE SUPERVISOR AND KEY STAKEHOLDERS TO RECEIVE AND DOCUMENT FEEDBACK (10-15 MINUTE CONVERSATIONS COVERING INITIAL IMPRESSIONS, PROGRESS TOWARDS ACHIEVING THE GOALS AND OBJECTIVES OF THE ONBOARDING PLAN AND PERCEIVED STRENGTHS/WEAKNESSES)		SCHEDULED TIME WITH HR AND/OR IMMEDIATE SUPERVISOR TO COVER ANY QUESTIONS OR CONCERNS OF THE NEW EMPLOYEE AND CHECK PROGRESS AGAINST PERFORMANCE MEASURES AND GOALS OUTLINED IN THE ONBOARDING PLAN AS WELL AS IDENTIFY KEY STRENGTHS AND AREAS FOR IMPROVEMENT WHICH ARE ESSENTIAL TO THE ROLE'S MOST PERTINENT RESPONSIBILITIES, GOALS AND OBJECTIVES (THIS IS A CASUAL REVIEW/DISCUSSION)	
CATEGORY 6: THREE MONTHS AFTER START DATE			
HR SHOULD CONTACT THE IMMEDIATE SUPERVISOR AND KEY STAKEHOLDERS TO RECEIVE AND DOCUMENT FEEDBACK (10-15 MINUTE CONVERSATIONS COVERING INITIAL IMPRESSIONS, PROGRESS TOWARDS ACHIEVING THE GOALS AND OBJECTIVES OF THE ONBOARDING PLAN AND PERCEIVED STRENGTHS/WEAKNESSES)		SCHEDULED TIME WITH HR AND/OR IMMEDIATE SUPERVISOR TO FORMALLY REVIEW PROGRESS AGAINST PERFORMANCE MEASURES AND GOALS OUTLINED IN THE ONBOARDING PLAN AS WELL AS IDENTIFY KEY STRENGTHS AND ACHIEVEMENTS, AREAS FOR IMPROVEMENT AND SHORTCOMINGS MAKING RELEVANT ADJUSTMENTS TO THE ONBOARDING PLAN SETTING REALISTIC EXPECTATIONS FOR THE SIX MONTH MARK (THIS IS A FORMAL REVIEW/DISCUSSION AND SHOULD BE DOCUMENTED)	
CATEGORY 7: SIX MONTHS AFTER START DATE			
PERFORM A 360 DEGREE PERFORMANCE AND FEEDBACK REVIEW (BEST DONE BY HR OR A NEUTRAL THIRD PARTY)		REVIEW EMPLOYEE PERFORMANCE AGAINST THE MEASUREMENTS IN THE ONBOARDING PLAN AS WELL AS FINDINGS FROM THE 360 DEGREE PERFORMANCE AND FEEDBACK REVIEW	
WITH EMPLOYEE'S INPUT, SET AN INDIVIDUAL PERFORMANCE PLAN OUTLINING THE NEXT YEAR'S PERFORMANCE MEASURES FOR GOALS AND OBJECTIVES			

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