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|  | **ADVANTAGE PROFESSIONAL SERVICES INC.**  **EXECUTIVE SEARCH & Business SOLUTIONS**  ***Specializing In The Energy Industry***  **recruitment  ABORIGINAL RELATIONS**  **GOVERNANCE  RISK & Regulatory** |

**Sample Onboarding Checklist**

**Instructions for Recruiting:**

This onboarding checklist contains sample activities that are considered to be best practices for increasing new hire performance and engagement. Alter the checklist to reflect onboarding activities for hires at your organization, and assign owners (e.g., Recruiting, hiring manager, or HR generalist) for each activity. Once you have customized the checklist appropriately, provide it to hiring managers to inform them of the process and keep them accountable for completing necessary onboarding activities. Delete this text before presenting to hiring managers.

Studies clearly illustrate that a strong effective onboarding program can reduce staff turnover by 50% of more. The savings are huge.

If you require additional information on tax deductions or vacation entitlement for an employee, please consult http://www.cra-arc.gc. for further information. Each province/territory has unique overtime, vacation so take the time to ensure you have the correct information. Should you wish Advantage Professional HR Advisory professionals to assist you, please call and we will be happy to help.

**Instructions for Hiring Managers:**

There are many logistical and strategic components to onboard new hires into the team and organization effectively. Yet, this critical stage often fails to receive the attention it warrants due to divided or unclear responsibilities and a lack of defined tasks and activities. If you organization does not have an HR Manager, then use this framework as a guideline for hiring. It is incredibly useful for new managers to have a framework to use if HR is not full time.

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**Sample Onboarding Checklist for New Hires**

**XXX National Industries Inc.**

**4717 Newland Drive**

**Toronto, Ontario**

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| New Hire Name and Position | Start Date | Supervisor Name | Department/Location |
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| **Pre-Start Sample Checklist** | | | |
| **Task** | **Additional Information** | **Owner** | **Completion Date** |
| 1. Email/mail or deliver a New Hire package before this person starts work with you. | * + Ensure you have the signed offer of employment returned to you prior to start date   + Ensure all background checks are completed and reviewed prior to start date   + Ensure all drug & alcohol, drivers abstracts or education certifications have been reviewed and completed prior to start date   DO NOT PROCEED IF ANY OF ABOVE ARE MISSING | Senior Mgmt or HR Manager | Mandatory to have these completed before start date |
| 1. Official Welcome Call | Call to officially welcome new employee after acceptance and all above criteria have been met. Confirm the following:  -dress code, working hours, parking information, where to go on the first day, who to ask for on the first day, confirm start date and time. | Hiring Mgr or Human Resources | Immediately upon completion of #1.  Second call a few days before start to ensure they have not changed their minds. |
| 1. Prepare new hire package for start date | Employee Package should include:  -Employee hand book of policies  -Tax Forms for payroll deductions (http://www.cra-arc.gc.ca)  -Form for company property (keys, laptop, parking pass)  -employee emergency contact information form  -email payroll& accounting of new hire information  -schedule any training programs, job shadowing | Hiring mgr or Human Resources | A heads up immediately and final forms once they have started work. |
| 1. Set up desks, phones, security pass, computers | Ensure the person has the correct software and computer access required to start work on the first day. If the employee requires a company laptop or cell phone, ensure you start on this process a few weeks ahead.  Computer software licenses-check with your IT provider to set up emails and access/forbidden sites such as Facebook, LinkedIn during business hours. | Hiring Manager,  IT support, Cell Phone provider | Immediate upon acceptance of offer |
| 1. Order Business Cards if required | Business cards can take a week to have ready. Ensure you confirm their email address and cell number once you have obtained that information. | IT Support/HR Manager | Immediate upon acceptance of offer |

**Sample Check list for Accounting/Payroll Onboarding Employees**

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| 1.Receipt of employee package | Includes: Start date, rate of pay, tax forms signed, benefit start date (or waived) probationary period if any, vacation entitlement, emergency contact info | Payroll | Start Date or sooner |
| 2. Enroll in payroll & benefits software | Set-up in your payroll system and benefits program  Arrange to meet new employee to explain benefits programs if applicable | payroll | Start date or sooner |
| 3. Probationary Period | Ensure you diarize the probationary period 1 week before the review is to be done so you can meet with the hiring manager to prepare in advance | HR & Hiring Mgr. | Start date or sooner |
| 4. Update Budgets | If this is a new hire, ensure you update your financial budget for the extra cost. Reflect change if this is a replacement person. | accounting | Start date |
| 5. Cancelled cheque or banking information | Obtain banking information if direct deposit. Obtain a cancelled cheque for accuracy. | payroll | Start date |

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| **First Week** | | | |
| **Task** | **Additional Information** | **Owner** | **Completion Date** |
| 1. Introductions | Show the new hire that he/she is appreciated by scheduling a lunch or social event such as coffee and donuts during coffee break.  -Send email to announce their position and name to corporate staff or post notice in lunch room area. |  |  |
| 1. Have the new hire complete necessary work documents | The new hire should complete government forms ( TD-1), and enroll in benefits. Review company policies in detail and sign off on policies. Ensure waivers are signed and approved. |  |  |
| 1. Review processes, contacts, and sources of information necessary to the new hire's job | This conversation should include introducing basic workflows; reviewing the names, titles, and basic background of immediate team members; and introducing the new hire to online and offline places to find answers regarding their job. |  |  |
| 1. Introduce the new hire to members of his/her immediate team | Have the new hire set up one-on-one conversations with team members throughout the first few weeks. If job shadowing-ensure they know who they are shadowing and when if it is multiple people |  |  |
| 1. Give the new hire a tour of the facilities | This tour should include where the new hire can find supplies, copy machines, coffee, restrooms, the cafeteria, and exits. |  |  |
| 1. Review onboarding objectives and timelines with the new hire | Ensure the new hire is prepared for the onboarding schedule for the first few months, and address questions the new hire may have.  Ensure they know meeting they need to attend that month |  |  |
| 1. Provide the new hire with a clear explanation of their first assignment | Ensure they have a list of deadlines, reporting dates, production schedules, delivery schedules and other expectations for their job. |  |  |
| 1. Get to know the new hire's preferences | Arrange a meeting to hear about the new hire's work style, communication preferences, areas of strengths and weaknesses, and career objectives. |  |  |
| 1. Review performance objectives for probationary period or annual reviews | Provide the new hire with an overview document of the performance review process. Walk through a sample performance review form that includes performance criteria, how criteria are measured, how information will be presented to the new hire, and discussion points during the formal review. |  |  |
| 1. Check with them after their first day, third day and last day that week. | Follow up with their hiring manager, their co-workers to ensure they are fitting in and liking their job surrounds, answer or clarify any issues immediately. Employee turn-over is very high in the first week of employment. These steps help to mitigate that loss of new people. |  |  |

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| **First Month Check List** | | | |
| **Task** | **Additional Information** | **Owner** | **Completion Date** |
| 1. Explain to the new hire how their job responsibilities relate to organizational goals | Once the new hire has developed an understanding of their job responsibilities and organizational structure, speak with the new hire regarding the impact that they have, however indirectly, on organizational outcomes. This can be done by using an example or starting from the customer's point of view. |  |  |
| 1. Assign a mentor/buddy to assist the new hire in acclimating to the organization | Buddies should be employees who are knowledgeable of the organization and high-performing. Provide buddies with a list of possible activities to undertake or questions to answer with the new hire. |  |  |
| 1. Create a networking plan between the new hire and appropriate individuals across the organization | The networking plan should include senior executives, peers of the new hire, and other new hires within the organization. |  |  |

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| **First Three Months Check list** | | | |
| **Task** | **Additional Information** | **Owner** | **Completion Date** |
| 1. Provide an early informal performance review | The informal review should be a scheduled, structured conversation between the new hire and their manager regarding their performance to date. The informal review should take place after the manager has had time to gauge performance strengths and weaknesses of the new hire, but early enough for the new hire to change behaviors before the formal review process begins. During the conversation, the manager should discuss actionable items to improve performance, while making clear that the review will not become part of the new hire's record. This activity should conclude with creation of an individual development plan for the new hire. | Hiring Manager & HR |  |