

# Employee onboarding

## Free checklists for HR

Make use of CIPHR's four onboarding checklists to ensure your onboarding processes run efficiently. For a greater employee onboarding experience, use our [CIPHR Onboarding software](#) which empowers you to create a personalised onboarding programme.

### 1. Preboarding

HR action	Completed?
<p><b>Contact new starters</b></p> <p>Confirm the start date and time with your new starters. Let them know where in the office they should go first, or if they are working remotely, let them know what time they should be online from.</p> <p>Also let the new starters know that you are on hand to answer any questions they may have prior to their starting date.</p>	
<p><b>Make sure you have relevant employee documents</b></p> <p>From copies of the new starters' passports (for the right-to-work check) to further proof of identification, you need to make sure the new starters provide relevant documents before their start date (or on their first day) – if you use <a href="#">specialist HR software</a>, new starters should be able to upload documents online, including contact details, references, and next of kin information.</p>	
<p><b>Contact existing managers and employees</b></p> <p>Let current employees and managers know that new employees will be starting soon. Inform them of the employees' names, job roles, start dates, and who the new starters will be reporting to.</p> <p>This communications should simply remind employees to be welcoming and aware of the new starters.</p>	
<p><b>Assign a buddy</b></p> <p>Ask existing employees if they would like to be a buddy or assign an employee to this role. Let them know what the purpose of being a buddy is and what they should do to support the new starters.</p>	

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<p><b>Prepare desk and equipment</b></p> <p>If the new starters are working from the office, make sure the desk is set up along with the laptop and any other equipment (eg company mobile), and ensure that all relevant software licenses and system access is ready and available from day-one.</p> <p>Alternatively, if they're working remotely, make sure any equipment is prepared beforehand with the support of IT, and sent to the employees' address.</p> <p>Also make sure to ask what the new starters' work setup is like at home and if they need another screen to work from or other equipment to assist them.</p>	
<p><b>Order pass key and ID</b></p> <p>Make sure you have a pass key and ID card ready for the new starters on their first day.</p>	
<p><b>Provide educational content</b></p> <p>Depending on the role, you may want to provide educational content to help the new starter understand the organisation and the market. Avoid sending commercially sensitive information such as price lists before the first day, but background information about the organisation, its culture, values, key people, its history and the market it operates in are all helpful.</p>	
<p><b>Put together a welcome pack</b></p> <p>Warmly welcome new starters by putting together a welcome pack. This can include gifts which help the employees feel comfortable on their first day – eg company branded notebook and pen, water bottle, or even a pack of biscuits to have with the tea or coffee runs.</p>	

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### 2. First day

HR action	Completed?
<b>Give a workplace tour</b>  Show your new starters around their workplace to help them feel comfortable and familiar in the new environment. If new starters are temporarily working remotely, you can provide an office tour when they are in the office.	
<b>Introduce colleagues</b>  During the tour, or after it, introduce your new starters to their colleagues and get each colleague to introduce themselves and briefly explain their role.	
<b>Set up work equipment</b>  Ensure that the new starters have the correct login details needed for everything that requires access – where necessary, work with IT to ensure this access is provided in advance.  Where employees are expected to work with software that they might not be familiar with, arrange training, either in person or via video, training course or written guide.	
<b>Go through employee handbook</b>  Set some time aside for you or another member of the HR team to take the new starters through the employee handbook.  Present your work policies, procedures, code of conduct and more in a meeting so that your new employees know everything they need to and give them an opportunity to ask questions.	
<b>Get employees to fill in necessary forms</b>  If the employee contract hasn't already been signed by all parties prior to the new starters' first day, make sure you get this done on the first day and chase other parties to sign the contract. Don't forget to also let the employees know that they need to read and sign other relevant documents as well.	

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### 2. First day

HR action	Completed?
<p><b>Make sure colleagues socialise with the new starters</b></p> <p>Remind the assigned buddy and colleagues to check in with the new starters and to take them out for a team lunch (if it hasn't already been arranged by someone). This can help make the new starters feel like part of a team outside of the office environment.</p>	
<p><b>Encourage new starters to update their LinkedIn profile</b></p> <p>You don't want your new employees promoting themselves as an employee of one of your competitors so remind them to update their LinkedIn profile if appropriate. You can make this task easy by providing a couple of sentences to help them describe your organisation. If you would like to encourage your employees to use company branded imagery, then provide these in the correct sizes.</p>	

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#### 3. First week

HR action	Completed?
<p><b>Schedule meetings with key people</b></p> <p>Book a meeting between your new starters and key members of the senior leadership team or department heads who can take employees through the goals of the organisation and explain how each department or business unit works.</p> <p>If the CEO is unavailable for a meeting with new starters, try to arrange a video welcome where the CEO introduces themselves and shares more about the history and values of the organisation.</p>	
<p><b>Schedule meetings with other managers</b></p> <p>Find out when other managers are free for an induction to take the new starter(s) through their role and the role of their team.</p> <p>These inductions can help the new starters gather a better understanding of the different teams within the organisation and how everything works.</p>	
<p><b>Check in with new starters</b></p> <p>Visit the new starters face-to-face or have a virtual call if working remotely during the week to simply check in and see how they are finding their week so far, and if they are struggling with anything. Remember, they will have a lot of new information to process, so a friendly hello is always appreciated.</p>	
<p><b>Organise and schedule relevant training</b></p> <p>Get new starters to increase their knowledge and complete relevant training during their first week when they aren't in meetings.</p>	

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### 4. First month

HR action	Completed?
<p><b>Be on hand to answer any questions</b></p> <p>Drop a message to your new starters and remind them that you're on hand to hear their concerns or to support them with any issues they may be having so far. If new starters are struggling with their mental health, don't forget to direct them to helpful employee assistance programs.</p>	
<p><b>Encourage employees to review the onboarding process</b></p> <p>Once your new starters have settled into their roles, ask them if they are happy to review the onboarding processes they went through and to provide you with feedback on areas which they think can be improved. Such feedback can help you perfect your onboarding processes and satisfy future new starters.</p>	
<p><b>Create objectives</b></p> <p>Remind managers to provide a clear set of objectives for new members of their team and to schedule reviews of these objectives at regular intervals.</p>	