HIRING ESSENTIALS
for your Business

ONBOARDING
A TEAM APPROACH

THE FIRST 90 DAYS OF TASKS FOR THE TEAM

ONBOARDING

THE TEAM APPROACH

So, you made the offer and the applicant has accepted, now what? It is time to set both yourself and the new employee up for success. How do you do that? In the past, it was often referred to as "The Orientation" and might have lasted a day or two at most. Now the process is called "Onboarding" and will usually start before the employee even gets to work on the first day and continues through their probationary period.

The key to an effective "Onboarding" program is to be prepared and have a plan in place to achieve success. There are two objectives in "Onboarding". The first is to make sure that the new employee is comfortable and feels welcome, and the second is to try to minimize the ramp up time required to get the employee to a productive level.

The first days and weeks can be very overwhelming. You can help ease this time by sitting down with your new employee and going over your plan in detail. This should include a schedule to show who will be with them at what times and what they will be working on. For example, the IT Department Supervisor will be training you on the use of the database or systems used in the office and the HR assistant will be going through the compensation structure and gathering information required for payroll. Other items that should be considered are performance/job expectations at certain agreed upon dates, training courses that they will be involved in and a review of policies and procedures. It is important to allow them time each day during the first week to get accustomed to their new surroundings. Have a light workload planned along with the administrative/hr related tasks that must be completed.

Because this process can last for 90 days or more, it is important to make yourself available to your new hire on a regular basis. Have meetings pre-scheduled to review progress and address any questions. Make sure that you assign a co-worker to assist the new employee on a day to day basis.

By planning for success, you will achieve success! Make the onboarding process interactive and interesting, allow for the new employee to see how they fit into the "big picture" and give them the tools to learn how to do the job right the first time. This will increase their understanding and awareness of the company goals and objectives which will in turn increase their productivity on the job.

MANAGER/SUPERVISOR CHECKLIST

ACTIVITY TYPE		
PREPARE FOR EMPLOYEE START DATE	**STATUS**	**ACTIVITY/FOLLOW UP NOTES**
Designate Mentor		
Send welcome email to the new employee that contains information on work hours, dress code and parking		
Contact HR for completion of New Hire Forms		
Ad or invite new hire to recurring meetings		
Contact new employee to confirm start date and time		
Schedue training required		
Set up meeting(s) for new employee an HR designated person for orientation and regular follow up		
Discuss expectations for employee with mentor and supervisor		
DAY 1 & FIRST WEEK	**STATUS**	**ACTIVITY/FOLLOW UP NOTES**
Welcome on arrival to the office		
Guide employee to their workspace to get settled		
Provide employee with the welcome package including keys, security pass and ID		
Introduce employee to their mentor		
Take on tour of the facility, also point out washrooms, dining options and smoking area if required.		
Review lunch times, break, annual leave requirements ect		
Review job description and duties		
Discuss and set up performance goals for first, second and third months		
Set up regular 1:1 meetings for the next 6 weeks		
FIRST MONTH	**STATUS**	**ACTIVITY/FOLLOW UP NOTES**
Check in with new employee to see how things are going		
Review the training schedule on a regular basi		
Touch base with mentor to discuss progress		
Discuss current projects and milestones		
Identify and address learning needs and adjust goals as needed		

SECOND MONTH ACTIVITIES	STATUS	ACTIVITY/FOLLOW UP NOTES
Check in with new employee to see how things are going		
Review the training schedule on a regular basis		
Touch base with mentor to discuss progress		
Discuss current projects and milestones		
Identify and address learning needs and adjust goals as needed		
Ask for feedback from the employee and respond to any concerns		

THIRD MONTH ACTIVITIES	STATUS	ACTIVITY/FOLLOW UP NOTES
Prepare and complete the 90 day preformance probationary review		
Ask for feedback from the employee and respond to any concerns		
Set performance objectives for the remainder of the year		
Continue to check in with employee, supervisor and mentor		

EMPLOYEE ONBOARDING CHECKLIST

ACTIVITY TYPE		
WEEK 1 ACTIVITIES	**STATUS**	**ACTIVITY NOTES**
Meet with your manager		
Discuss working relationship – styles, preferences, quirks		
Discuss key responsibilities and objectives		
Review key partners list		
Review the organization and where you fit in		
Discuss how to manage 1:1 meetings		
Discuss strengths and development needs and desires		
Set up regular 1:1 meetings with your manager		
Finalize 30, 60, and 90-day agreements with your manager		
Review team org chart and understand general structure		
Meet with mentor		
Meet with HR for orientation of company policies & procedures and to complete HR paperwork		
Meet with IT department rep to review technology and access requirements		
30-DAY ACTIVITIES	**STATUS**	**ACTIVITY NOTES**
Complete 30 day check in with manager		
Continue with scheduled training		
Touch base with mentor weekly		
Review goals and assess areas where you may require help or training		
60-DAY ACTIVITIES	**STATUS**	**ACTIVITY NOTES**
Complete 60 day check in with manager		
Touch base with mentor weekly		
Review goals and assess areas where you may require help or training		
90-DAY ACTIVITIES	**STATUS**	**ACTIVITY NOTES**
Complete 90 day review with manager		
Schedule training required to		

OFFICE MANAGER CHECKLIST

ACTIVITY TYPE		
PREPARE FOR EMPLOYEE START DATE	**STATUS**	**ACTIVITY NOTES**
Create welcome package		
Contact IT for employee set up with computers, network, mobile & phones		
Get work space set up and stocked with supplies		
order business cards		
Send email to employees to introduce the new employee and position they hold		
request keys, security access, ID's or passwords for new employee		
WEEK 1 ACTIVITIES	**STATUS**	**ACTIVITY NOTES**
Provide company org chart		
Provide company contact list		
Provide parking pass, maps and area information		

HUMAN RESOURCES CHECKLIST

ACTIVITY TYPE		
PREPARE FOR EMPLOYEE START DATE	**STATUS**	**ACTIVITY NOTES**
Prepare Employee Contract/Agreement		
Create Employee File		
Confirm receipt of offer letter, and all required documentation		
Confirm background checks are completed (reference, criminal/credit, education)		
Set up orientation for new hire		
FIRST DAY AND WEEK	**STATUS**	**ACTIVITY NOTES**
Meet with employee to complete paperwork		
Ensure enrollment in benefits		
Review company culture,vision, goals and work style		
Review company policies and procedures		
Check in with Employee, Manager and Mentor to see how the first week went		
90 DAY (PROBATIONARY PERIOD) COMPLETE	**STATUS**	**ACTIVITY NOTES**
One week prior to the 90 day probationary period ending ensure that the Performance review is completed		

IT CHECKLIST

ACTIVITY TYPE		
PREPARE FOR EMPLOYEE START DATE	**STATUS**	**ACTIVITY NOTES**
Prepare computer, network access, software and printer setup		
mobile phone		
Confirm security, ID and passcode or card access		
Set up phone & email access		
Send email to welcome employee with all pertinent technical information and IT guide with policies		
FIRST DAY ACTIVITIES	**STATUS**	**ACTIVITY NOTES**
Review all technology set up and access with new hire		
Review how and who to contact for IT assistance		
Assist with online directory setup		

MENTOR/SUPERVISOR CHECKLIST

ACTIVITY TYPE		
PREPARE FOR EMPLOYEE START DATE	**STATUS**	**ACTIVITY NOTES**
Contact new employee to introduce yourself prior to the start date		
Check workspace to ensure that all supplies and technology is in place		
DAY 1 AND FIRST WEEK ACTIVITIES	**STATUS**	**ACTIVITY NOTES**
Review company culture, vision, mission and values and what they mean to you		
Take new employee to lunch		
Make peer introductions		
Show around the office		
Answer any questions		
Check in daily with the new employee to see how things are going and ask if they need help		
FIRST MONTH ACTIVITIES	**STATUS**	**ACTIVITY NOTES**
Continue checking in on a weekly basis		
Review the employees goals and see what they need help with		
Assist them in obtaining the training to achieve goals		
SECOND MONTH ACTIVITIES	**STATUS**	**ACTIVITY NOTES**
Continue checking in on a weekly basis		
Review the employees goals and see what they need help with		
Assist them in obtaining the training to achieve goals		
THIRD MONTH ACTIVITIES	**STATUS**	**ACTIVITY NOTES**
Continue checking in on a weekly basis		
Review the employees goals and see what they need help with		
Assist them in obtaining the training to achieve goals		