

Employee Onboarding Checklist

A strong onboarding process can help improve [new hire retention by 82% and overall productivity by over 70%](#). The first few months are the most important for an employee, getting them right is key to limiting disruption and maximising their potential in the business.

With so much to remember, it can be difficult to get the essentials done, let alone making the experience enjoyable and rewarding for the employee. So follow our complete employee onboarding checklist. Every single thing you need to know and do to make your new employee's onboarding experience a dream.

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Before An Employee's First Day

- The employee start date and time has been decided and communicated to both the employee and the appropriate colleagues in the team. *Tip: try and get them to start a little later on their first day so you've got time to iron out any last minute tasks.*
- The employee has been provided their contract for employment. This should be signed and returned to the organisation.
- If any training/instructional documentation is necessary before the employee starts, then this has been provided to them
- The employee knows to bring the following documents (if appropriate):
 - United States
 - Passport
 - Driver's license
 - Proof of address
 - Social security card
 - Banking information
 - United Kingdom
 - Passport

- National insurance card
 - Driving license
 - Proof of address
 - UK visa
 - P45
 - Banking information
- The employee has been explained what the dress code is
 - The employee is aware of the point of contact (the person they should ask for at reception when they first arrive)
 - The employee has received the employee handbook
 - The employee's contact details have been gathered
 - The department the employee will be working in is aware of their new arrival. The tasks the new employee will work on during their first few weeks have been determined with help from their soon-to-be colleagues.
 - A full background check has been completed
 - The employee's workstation has been set up, with their computer and logins ready to get started
 - The employee's workstation follows workplace health guidelines
 - [UK Guidelines](#)
 - [US Guidelines](#)
 - The employee has logins for their own internal email account
 - The employee has been added to the relevant internal SaaS and systems, for example:
 - Communication
 - Slack ([instructions](#))
 - Microsoft Teams ([instructions](#))
 - Google Hangouts ([instructions](#))
 - Software Development
 - GitHub ([instructions](#))
 - AWS ([instructions](#))
 - Google Cloud ([instructions](#))
 - Marketing
 - Google Analytics ([instructions](#))
 - HubSpot ([instructions](#))
 - Project Management

- Asana ([instructions](#))
- Monday.com ([instructions](#))
- Basecamp ([instructions](#))
- *These are some of the tools your business may be using, be sure to include any not on the list that would be relevant for your new employee*
- The documents that your new employee will need to sign are prepared and ready, these may include:
 - [I-9 employment eligibility form](#) (US)
 - [W-4](#) (US)
 - Any relevant insurance forms
 - Any relevant direct deposit forms
 - Non-disclosure agreement
- The employee has complete [e-verify](#) (US)
- A key card/fob has been left at reception (or instructions on how to first enter the office has been provided)
- The employee's soon-to-be direct colleagues have been invited for a welcome coffee/lunch on their first day
- If not yourself, work out who'll be your new employee's onboarding buddy - the person who'll be leading the employee on all first day tasks

An Employee's First Day

- The employee has been given a tour of the workspace and introduced to the key people in the team (as well as their point of contact, or onboarding buddy)
- The employee is aware of the work days start and end times (and how they should clock in, if necessary)
- The employee is aware of work break times (as well as recommendations for local eateries during breaks)
- The employee has set themselves on the systems and tools they'll be using
- The employee has been informed of the basic safety precautions
- The employee has been provided the the essential documents (outlined previously) and has signed and returned them if necessary
- The employee has been set up on payroll

- If not completed already, the employee has been provided with a training manual/information documents
- If suitable, a team coffee/lunch can be undertaken
- The employee has been informed of the company's medical insurance cover
- The employee has been informed of the company compensation and benefits
- The employee has been invited to connect with the company's social media accounts
- The employee has been provided with an office plan, informing them where everyone sits and highlighting individuals they'll likely work with regularly
- The employee has been assigned an initial task/project
- The employee is aware of their role within the department and the expectations for them for the following few months
- Check in meetings (ideally weekly) are scheduled in order to see how the employee is progressing with their work and to address any concerns
- A short review meeting is scheduled and completed at the end of the day to report on how the day went, how the employee tackled the tasks given to them and to go through any issues they may have

Throughout Employee's First Week

- Employee is receiving short daily check in's to ensure work is being completed and any problems are being addressed
- Employee has scheduled/completed short meetings with colleagues from other departments to better understand how different areas of the business integrate
- At the end of the week, a meeting is scheduled to assess if the expectations made on the first day are being hit and to schedule work and adjust targets going forward

Month One And Going Forward

- Employee is scheduled to complete any role specific training for upskilling (if appropriate)
- At the end of the month, a review meeting is scheduled to assess targets set during week one, address any issues and cover the employee's work going forward