


EMPLOYEE ONBOARDING

Checklist

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Use this checklist to standardize your onboarding process and support your new candidates in becoming top-performing and successful employees. Add or remove items that are important for your team or organization.

BEFORE THEIR FIRST DAY

Critical Goal: Prepare new employee for a productive first day.

- ☐ Ensure all pertinent employment documentation has been received, signed, and submitted to the proper departments to be processed (ie. Payroll, IT, Procurement, Facilities/Security)
- ☐ If the employee advised they require accommodations in their work, be sure you have accounted and prepared appropriately
- ☐ Workstation is prepared including all required equipment, PPE, IT accesses
- ☐ Prepare a “Welcome Package” that includes all the essential items for the first few days such as requisite paperwork, employee handbook, policies, keys, contact names, and phone numbers.
- ☐ Send an email detailing the agenda for the first day, documents to bring, directions, parking instructions, a contact person, the dress code, and the general expectations for the first day. Follow up with call if no response.

FIRST DAY

Critical Goal: Employee is welcomed and feels connected to the team, and enjoys a safe work experience.

- ☐ Meet the employee at the entrance and provide them with a welcome tour of the facility.
- ☐ Introduce them to their new team, and highlight a member to act as the new employee’s informal mentor to connect with as needed. Find a way to connect the team as a group throughout the day.
- ☐ Let them know what to expect day-to-day such as working hours, lunch breaks, how to notify if they are sick, book vacation, how to record their time, etc.
- ☐ Review Health & Safety basics, including an introduction to the Health & Safety Board, and Representative (if applicable), policy and access to required training.
- ☐ Break up the day with some policy review, and a small introductory task they can contribute towards for the team to build that initial commitment to the team goals.

FIRST WEEK

Critical Goal: Employee feels supported in new workplace.

- ☐ Connect with the new employee informally each day, and set aside time together throughout the week for a personal connection opportunity. Have a loose agenda prepared to keep your conversation productive.
- ☐ Identify, organize, and schedule any necessary training for the next three months.
- ☐ Give an overview of the current team projects and goals, and educate the new employee on their role in contributing to those objectives.
- ☐ Organize time for a team building activity (Get creative- a game, a personality test, potluck lunch, hidden talent game).



FIRST MONTH

Critical Goal: Expectations have been made clear, and employee is on their way to becoming more competent in their new role.

- ☐ Host a formal meeting to review expectations, set SMART goals together, and schedule check-ins over the next three months to stay on track.
- ☐ Provide ongoing feedback, and document performance in the first 60-70 days. Prior to the 90-day mark, have a formal probation review meeting. If it isn't going well, be sure to let them know you won't be continuing the employment relationship before the 90-day mark.
- ☐ Continue to build team connections with occasional team building activities, or regular engagement opportunities.

THIRD MONTH

Critical Goal: Employee is meeting their performance goals and is working toward long-term success.

- ☐ Complete the formal probation review prior to the 90-day mark. If things have gone well, revisit your SMART goals from Month One and evaluate progression, set new goals for the next 6-9 months. Set a schedule for ongoing formal review and check-ins periodically.
- ☐ Perform a sort of Entrance Interview to get their feedback on the wins and challenges of their onboarding experience. Use this feedback to improve your processes.
- ☐ Assign additional duties and responsibilities, if they are ready.



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