

Onboarding That Sets New Hires Up for Success

Make the company's first impression a lasting one.

Preparation ahead of start date

Schedule & Introductions

- ☐ Create a first-week onboarding schedule (build in breaks and time for information processing).
 - Include time for regulatory, industry and job specific training.
 - Schedule meetings with manager, direct reports, key stakeholders & cross-functional partners.
 - Introductions to IT, HR, Finance and admin as needed.
- ☐ Sign them up for applicable training.
- ☐ Add them to meetings they will be attending.
- ☐ Prepare welcome package (if applicable)

Employment Documentation

- ☐ Employment agreement fully executed in employee file.
- ☐ Reference checks completed (if applicable).
- ☐ Background checks completed (if applicable).

Workspace & Equipment

- ☐ Workspace assigned.
- ☐ Office, or cubicle cleaned and setup.
- ☐ Welcome supplies; notebook, pens, etc.
- ☐ Request for laptop, accessories, software and systems access submitted.
- ☐ Email account created.
- ☐ Building access cards/keys prepared.
- ☐ Equipment shipped to remote employee (if applicable).

Connect Before Their First Day

- ☐ Schedule a brief welcome call 1-3 days before the start date.
 - Confirm start time and dress code expectations.
 - Discuss lunch plans (bring lunch, lunchroom amenities, or team lunch plans).
 - Let them know who to ask for when they arrive.
 - Provide parking and/or transit information.

First Day

Welcome Communications

- ☐ Welcome email sent to new hire outlining:
 - First-week schedule
 - Training requirements
 - Key contacts
 - Resource locations
 - Seating/office floor plan
- ☐ Company-wide or department-wide welcome announcement sent. Introduction includes:
 - Employee name
 - Role/title
 - Department/team
 - Work location
 - Short professional background (optional)

Arrival & Orientation

- ☐ Employee greeted upon arrival.
- ☐ Workspace and facilities tour.
- ☐ Equipment distributed and tested.
- ☐ Login credentials verified.
- ☐ First-week schedule review.
- ☐ HR/Payroll/Benefits items.
 - Banking, SIN and emergency contact information collected.
- ☐ Employee handbook/policies provided.
- ☐ Review key or nuanced policies reviewed with new hire.

First Week Follow-Up

- ☐ Establish regular check-in times.
- ☐ Review role expectations and discuss next 30-day goals
- ☐ Ensure training is completed for schedule for following week.
- ☐ Remote setup works at home (if applicable).
- ☐ No issues with software or system access.
- ☐ Key introductions completed or scheduled for following week.
- ☐ Questions addressed and support resources provided.