ONBOARDING PROGRAM CHECKLIST

Congratulations! If you are reviewing this Executive Onboarding Program Checklist, it's likely because a new teammate has joined the organization. Providing new employees with the right tools, communication and a smooth onboarding experience is essential in laying the foundation for a successful experience with the team.

In fact, a positive orientation can make all the difference in the company's retention rates, as more than half of voluntary turnover happens within six months of a new hire's start date. Use this checklist as a handy guideline to ensure you have covered the bases of everything an individual stepping into this role will need to know in the days leading up to their start date and through their first 90 days. While we are using best practices gleaned from various businesses, you should tailor this Onboarding Program Checklist based on the specific position's needs and objectives.

PRE-ONBOARDING ACTIVITIES

The objective of the pre-onboarding phase of the process is to plan and prepare for the new hire's arrival, and to ensure their successful entrance into the organization.

Offer letter and employment agreement

- ☐ Offer letter sent and signed (confirm start date and salary) by both parties
- ☐ Background check completed – 3rd party
- ☐ Drug screening & physical passed (if applicable)
- ☐ Non-Disclosure Agreement (if applicable)
- ☐ Non-compete agreement (If applicable)

Relocation Program

- ☐ Review the Relocation Firm and written details of the program
- ☐ Instruct the Relocation Firm handling the employee to keep hiring manager abreast of house hunting activities and/or make them aware of any issues
- ☐ When a new hire is on a relocation trip to the area, hiring manager should make plans to visit with new hire for dinner/lunch (with spouses)

Employment details

- ☐ Completed Employment Application
- ☐ Obtain detailed employee contact information
- ☐ Obtain an employer identification number (SS#)
- ☐ W-4 Federal Tax Withholding Form
- ☐ W-4 State Tax Withholding Forms

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- ☐ Employee I-9 form complete (confirms worker's eligibility to work in the U.S.) Verification documents can include:
  - ▪ Unexpired U.S. passport or passport card
  - ▪ Unexpired temporary resident card
  - ▪ Unexpired employment authorization card
  - ▪ Unexpired temporary resident card
- ☐ Submit employee information to State New Hire Reporting Agency
- ☐ Equal Opportunity Data Form
- ☐ Direct Deposit Form
- ☐ Employee Benefits Review and Enrollment Forms
- ☐ Employee Handbook review – if at that location
- ☐ Business Cards – have cards on desk on the first day

Send new hire welcome email and/or package

- ☐ Prepare and send new hire welcome email/package
- ☐ Date and time of arrival
- ☐ What to bring for employment verification unless handled prior to starting
- ☐ Parking and building access
- ☐ Who to ask for upon arrival
- ☐ Dress code or appropriate attire

FIRST DAY / FIRST WEEK CHECKLIST

The objective of the first day is to ensure the new hire is welcomed into the organization by senior leadership and staff members and is satisfactorily in-processed. The remainder of the week should be dedicated to deliberate introductions and/or work projects within the organization, especially to the understanding of the positives in the role coupled with helping the new hire understand the pitfalls and critical issues.

Review the Onboarding/Meetings Booklet with:

- ☐ Company orientation program/video/booklet
- ☐ Specific Onboarding Program – booklet format
- ☐ Key info on the organization – background structure, mission, culture, etc. (Also review webpages for the company and its various businesses to obtain the depth and scope of their businesses)
- ☐ Organization chart with reporting structure discussed
- ☐ Quick review of use and data available on the HRIS system
- ☐ Lists of acronyms
- ☐ List of recurring meetings
- ☐ Required training information
- ☐ Having the new hire provide a photo and bio, that can be utilized with their various meetings for background information

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Clean and setup workspace

- ☐ Desk or Laptop Computer setup.
- ☐ Review how to operate internal telephone systems
- ☐ Email – use and company policies
- ☐ Obtain and arrange applicable equipment – company & mobile telephone, computers, company credit card, etc.

Onboarding begins (coordinated between Hiring Manager and HR) - day one.

- ☐ Pre-populate the new hire's calendar with tasks and people to meet:
- ☐ Prepare/provide bios or resumes of direct reports
- ☐ Create a list of key stakeholders and key division leaders with: Name, title, phone number and email address (provide on day one).
- ☐ Target any specific tasks as essential activities and/or training
- ☐ Setup key meetings with hiring manager, peer leaders, a lunch with other senior leaders, or other
- ☐ Computer set up (Desktop computer system and/or laptop choice or availability *before they start)*
- ☐ Company mobile phone set up or utilize own mobile phone with usage arrangement
- ☐ Company Email account set up before arrival
- ☐ Obtain and provide badge per company for building/office access (if applicable)
- ☐ Obtain and have ready required access codes, passcodes and accounts where appropriate

Introduce yourself to team members

- ☐ Host your first check-in to go over:
  - o The week's agenda
  - o Their role and key responsibilities review
  - o Typical expectations about work hours, procedures for overtime, use of flexible work policies, vacation and sick leave
- ☐ Take an office tour and highlight:
  - o Bathrooms, cafeteria, fire exits, fire extinguisher, first aid and safety areas
  - o Smoking areas or smoking restrictions (if applicable)

Company culture introduction by Hiring Manager

- ☐ Coordinate a welcome lunch
- ☐ Compile company information including values, mission, neighborhood or area map, contact information, etc.
- ☐ Review organizational and reporting structure
- ☐ Review social media policy (if applicable)

Additional Administration review

- ☐ Safety & Sexual Harassment Policies and Training
- ☐ Review of Employee Handbook and general guidelines
- ☐ Review of expense report policy
- ☐ Review of HR point of contact for any issues