

Checklist: Onboarding

This checklist should always be processed when a new employee has signed his or her contract. I recommend that Human Resources (HR) has such a checklist.

In an interview, the HR manager should review the checklist together with the employee's future manager.

At each point of the checklist, write down who is responsible for each action and when is the due date!

1. Send Info

Send all relevant information to the new employee, if he or she has not yet received it in the interview.

Who is in charge?

What info?

Deadline?

2. Invitation to Events

If there is an event in the following weeks, such as a Christmas party, summer party or similar, invite the new employee early - even if he or she is not yet working for the company at the time of the event.

Who is in charge?

What info?

Deadline?

3. Workplace and Work equipment

Prepare the workplace and work equipment so that everything is available when the new employee has his or her first day of work. This includes the desk, desk chair, writing and office utensils, as well as laptops, smart phones, etc. - and of course the office keys.

Who is in charge?

What info?

Deadline?

4. IT-Access

Make sure that the email account is already set up on the first working day. If possible, other software should already be activated for the new user, e.g. in the CRM system, so that he or she can start without waiting and without bureaucratic hurdles.

Who is in charge?

What kind of accounts?

What kind of software?

Deadline?

5. Documents about the company

All documents that the newcomer needs for orientation in the company should be available, e.g.: job description, organisation chart, company presentation, weekly plan of the canteen, telephone directory...

Prepare the workplace and work equipment so that everything is available when the new employee has his or her first day of work. This includes the desk, desk chair, writing and office utensils, as well as laptops, smart phones, etc. - and of course the office keys.

Who is in charge?

What kind of documents?

Deadline?

6. Information and expectations

Before the first interview, the manager should be clear about what expectations he or she has of the new employee and how he or she formulates them. What other points do you as a manager want to discuss with the new employee on the first day?

Who is in charge? _____

What? _____

Deadline? _____

7. Information for the team

As the manager of the new employee, you tell your team as early as possible when the new team member will start, so that your team can adjust to it.

Who is in charge? _____

What info? _____

Deadline? _____

8. “Godfather“

Who's gonna take care of the newby? The concept of a “godfather“ has proven its worth. This is an experienced employee who acts as a contact person for the new employee in the first 3-6 months - in technical as well as social matters.

Who will be the godfather? _____

What are his/ her duties? _____

For how long does
the godfather has this role? _____

9. Training

It is advantageous if you as a manager consider and write down in detail the induction and training plan for the next few weeks. You can then go through this together with the new employee on the first day. In the following days, you will probably adapt tasks, trainings and appointments, but at least you will have a concept that you can discuss with the new employee.

Who is in charge?

What trainings?

Deadline?

10. Block time for your new employee

As a manager, you should also take enough time on the first day to talk to the new employee in detail and show him around the company, as well as introduce him to your own team and other departments. Therefore, block enough time in your scheduler to talk to the new employee. Don't forget to set fixed dates for regular one-on-ones and for a meeting after the 2nd and 4th month of the familiarisation period and an appointment shortly before the end of the probationary period.

Who is in charge?

What dates?

Deadline?
