ELMO
CLOUD HR & PAYROLL

A Simple Checklist for Efficient Onboarding

Making a new employee feel welcome is an important part of the onboarding process.The more time you invest at the onboarding stage, the faster you can move from new hire to productive employee. Here are some key steps to help you make your company's onboarding process successful.

Before their first day:

Make sure that you have done all of the prep work to make the new employee's first day a success. If you have an automated onboarding system, you can save a lot of time on these activities.

- **Contact the new employee**– Inform them of their start date and time, office address, parking and other instructions to prepare them for the first day

- **Paperwork** – Make sure you have all the necessary new hire paperwork organised and ready for them when they start. With an online learning system, you can send all the necessary paperwork to the new hire to complete before they start making this process a lot faster and efficient.

- **Set up work space**– Ensure they have all the equipment they need to get started, a computer, phone, pens and paper or whatever their specific job requires them to use

- **Give them access**– Create accounts and give them access to things like: email, software, tools intranet, network access etc.

- **Email current staff** -Send out email to the office notifying everyone of new hire. Encourage them to make the new employee welcome

First Day:

- **Introduce them to team**– Introduce them to who they will be working with on a daily basis and anyone else in the company they may need to know

- **Assign a buddy/mentor**– Choose someone who is friendly and knowledgeable to help your new hire learn the ropes. They will be the go to person for questions and learning the ins and outs of the company culture

- **Tour the office**– Make sure they know where the kitchen, restrooms, lockers or any other important places are so they can familiarise themselves with the office

- **Assign them their first project** – Have projects ready for them to work on when they get in so they can immediately feel like they are contributing to the company and adding value

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First month:

- **Establish regular one on one meetings–** This will ensure you are able to track their mood and motivation as they continue to get acquainted with the company

- **Check on benefits and pay–** Ensure that their pay is accurate and being delivered on time as well as any benefits they are entitled to

- **Review job description to see if there are any questions**– Here is another opportunity to check the employee's expectations of the job and that they match yours

- **Discuss process for performance review**– Let them know what the process is and what they can expect to be evaluated on

3 Months:

This should be a formal review of the employee yet done in a friendly way encouraging open and honest feedback from both you and the employee.

- **Performance review** – This will act as a progress report. By having a formal performance review at 3 months, you can correct any bad habits and praise any good ones before it's too late to change them

- **Set goals**– Set down both the employee's goals and your goals for them in a formal written process so you can check in on the employee's progress

6 Months:

This is the last major milestone before the annual review and an important step to track how the employee is doing in the company.

- **Conduct another performance review**- This will be the last chance before their annual performance review to check on the employee's performance

- **Review goals and progress**– Take some time to go over the goals set at 3 months and the employee's progress to them

By completing these steps, you can make a new employee feel welcome and motivated and ensure they become a productive member of your organisation.