

## A new hire checklist every employer needs to have

**Author: Munodiwa Zvemhara . September 2020**

The *new hire* onboarding process is your chance to make a great first impression and to create a strong bond with a new employee. But in hyper-growth environments, it is easy to lose track of the details, so a *new hire checklist* can save the day. (Bauer et al., 2007)

To onboard a *new hire*, many tasks must be completed by human resources before, during, and after the employee arrives for their first day. Preparing a *new hire checklist* can make the entire onboarding process more efficient and productive.

*New hire orientation* is more than just learning the operational ropes, your onboarding process needs to be cultural as well. Getting new hires to feel like he or she is part of the team as quickly as possible is critical to success. (Aberdeen; 2008)

### **What is a new hire checklist?**

Great employee onboarding can improve *new hire* retention by 82% and productivity by over 70% (Bauer et al., 2007). A great process involves many steps, delegated across several functions. *New hire forms* can help you keep track of each task, its assignee, and its status, so you can ensure each new hire has the same, great early employee experience.

Before jumping into the first step of the *new hire checklist*, HR managers must decide whether they want informal or formal onboarding. In informal onboarding, an employee learns about his or her new job without an explicit organizational plan. Formal onboarding has a written set of coordinated policies and procedures to assist an employee in adjusting to a new role in terms of both tasks and socialization.

There four distinct levels of onboarding:

- **Compliance:** The lowest level that includes teaching employees basic legal and policy-related rules and procedures.
- **Clarification:** Ensures employees understand their new job and related expectations.
- **Culture:** Provides employees with a sense of organizational norms both formal and informal.
- **Connection:** Includes the vital interpersonal relationships and information networks that new employees must establish.

### **What should be in a new hire checklist?**

#### **Preboarding**

Employee preboarding is the time between offer acceptance and your new hire's first day. Eleven

percent of people have changed their minds on an offer after signing, so it's important not to neglect your *new hire* during this time.

### **1. Submit a hiring request and conduct a background check**

As soon as you offer the position and the employee verbally accepts, you can begin the process to have them officially hired. This can be done by submitting a hiring request. You can then run a *new hire* background check to ensure the safety of your other employees.

### **1. Draft and send the employee's offer letter and contract**

After discussing and agreeing upon the specific terms of their position, you can draft the *new hire paperwork*, an offer letter and contract. Here is what you can include in these documents:

- The agreed upon salary
- Benefits
- Their new job title
- Job description and responsibilities
- Paid time off policy
- Conditions of termination
- Agreement of non-disclosure
- Length of contract
- Work schedule
- Deadline to accept the offer

Once this is drafted and approved by leadership, you can include it in an email sent to the new employee. Ask them to sign the form and email it back to you.

### **1. Request necessary information from the employee via email**

If there is any *new hire paperwork* required such as academic qualification, you can send the employee an email informing them of this ahead of time so they can arrive at work on their first day with the completed documents and required identification.

### **1. Send an email preparing the new employee for their first day**

You can let the *new hire* know what to expect when they first arrive by drafting an email describing what will occur on their first day of the job. The email can detail their schedule for the first day, including who they are meeting with and what they will train on. You can also give them information regarding the dress code and any other rules or announcements you believe will be beneficial to know

### **1. Ensure all accounts and technology are working properly**

Meet with the IT department to ensure the *new hire* has a functioning laptop, computer monitor and its essentials. Ensure they are logged into all the accounts needed. This can include email, the company messaging system and any other productivity tools or software the company uses regularly. You can also take this time to prepare any additional accessories. This can include a name badge, identification card or a key to enter the building.

### **1. Create their agenda and prepare their workspace**

Upon arrival, you will want the *new hire* to feel welcomed and enthusiastic about joining your team. Preparing their workspace ahead of time lets them know how excited you are to have them as a new team member. When preparing their desk, you can give them *new hire forms*. This can include:

- Company branded presents like T-shirts and notebooks
- A welcome letter from a supervisor or CEO
- A signed card from their team or the entire company
- Their job description
- The company's brand book, if available
- A schedule of their first day or week

### **1. Invite staff members to welcome the new employee**

Alert staff members beforehand that a new employee is joining the company. This can be announced a few days in advance to best prepare everyone for the employee's arrival. You can present a card for everyone to sign as a welcome gift on the first day.

When the new employee arrives, you can send another message via email or through the company messaging system. The message can invite staff members to welcome the employee or to introduce themselves.

### **1. New hire orientation**

Once the new employee arrives, you can greet them at the door and give a tour of the office. Try to introduce them to essential workers in their department or coworkers they may regularly collaborate with. Introducing them to a smaller amount of people on their first day can help them feel less overwhelmed if there are a large amount of people in the office.

You can then give them a basic job orientation. This may include their supervisor explaining more of what their position entails and the goals of the department. It can also be the operations manager explaining company events and committees. The accounting department may meet with them as well to discuss payroll and how to submit expense reports. ?

### **1. Hold a meeting to review policies, job responsibilities and compensation**

Once they have met with other departments and employees, you can hold a meeting with the new

employee to discuss the company's policies, code of conduct and more. If you already sent this via email and the employee read it, you can provide a brief overview of the policies.

You can then review their job roles and responsibilities as well as their agreed upon contract. Once this has all been discussed, you can address any questions they may have.

### **1. Continue checking in with the new employee to review progress and address any issues**

As the days and weeks pass, you can stop by the new employee's workspace and ask how they are adapting. You can also hold meetings to discuss any progress they have made or explain what they can improve. Checking in on them regularly can help them feel more comfortable in the new workplace environment. It also reassures them that you value their wellbeing as an employee.

#### **References:**

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*Munodiwa Zvemhara is a consultant at Industrial Psychology Consultants (Pvt) Ltd a management and human resources consulting firm.*

*Phone +263 4 481946-48/481950/2900276/2900966*

*Cell number +263 783168453*

*Email: [munodiwa@ipcconsultants.com](mailto:munodiwa@ipcconsultants.com) or visit our website at [www.ipcconsultants.com](http://www.ipcconsultants.com)*

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