

WELCOMING YOUR TEAM

Leader checklist

Use this checklist to create a great, human-centred onboarding experience for people in your team, even before they start!

Pre-day 1

Congrats! Call your employee once the role has been accepted to congratulate them; agree a time to talk next to talk through Day 1 (this should be about 1 week before they start)

Build excitement: 1 week out call; discuss Day 1 Arrangements such as where to go, expectations, high-level agenda, dress code - anything to put their mind at ease and help them prepare

Get organised: Organise systems and equipment, Organise relevant meetings, including meet and greets with stakeholders, and a "Meet the Team" or "Welcome Lunch"

Day 1

Make it personal: Meet your employee (virtually / face to face) to build the excitement

Make it special: Craft a 'surprise and delight' experience to make them feel special (e.g. a small welcome pack, a card and some chocolates or a welcome sign). Simple works well.

Focus on the essentials: Sit down with your employee and walk them through their first week and first day schedule, including when you will cover team and organisational strategies and structures, upcoming work, culture, key systems (e.g. Intranet, Collaboration tools, HR/IT self-service, learning)

Weeks 2/3

Paint the bigger picture: Focus on expectations, goals and early successes, ensure you connect this to organisational strategy /priorities

Get to know each other: use your 1:1s and simple tools like user manuals to build deeper connection

Get a rhythm: Agree and establish regular cadence for coaching / 1:1s and start talking about their development and what they want to get out of the role

Introduce the work: Provide some clear deliverables and plenty of context

Recognise: Find ways to recognise early wins - research shows this builds strong early engagement

30-60-90 days

Help build social capital: determine who else might be good to meet, to start to help build a more diverse network and understand the organisation

Let your culture do the talking: Over the next 30-60 days, your employee will be assessing whether they are happy with the move, and the 'honey moon' period may start to wear off. Say what you mean and mean what you say - let your leadership actions speak.

Ask for feedback: what's been working well for your employee? Where do they want some support? What hasn't been working well? What questions do they still have?