

ONBOARDING AND INTEGRATION CHECKLIST

to help you effectively welcome, train, and integrate a new employee into your organization.

PREPARING FOR THE NEW EMPLOYEE'S ARRIVAL:

- Set up their workspace, including desk, chair, and necessary equipment ☐
- Prepare computer, software, and email accounts ☐
- Arrange access to necessary systems, tools, and platforms ☐
- Collect relevant documentation and forms for completion ☐
- Prepare an onboarding package (employee handbook, policies, etc.) ☐
- Schedule introductory meetings with key team members or stakeholders ☐
- Communicate the new employee's start date to your team ☐

FIRST-DAY ORIENTATION:

- Welcome the new employee and provide a tour of the office or workspace ☐
- Introduce the new employee to team members and colleagues ☐
- Provide an overview of the company's mission, values, and culture ☐
- Review the employee handbook, policies, and procedures ☐
- Assist the new employee in completing necessary paperwork and forms ☐
- Set up and test their computer, email, and relevant tools ☐
- Provide an overview of company communication channels and platforms ☐

TRAINING AND SKILL DEVELOPMENT:

- Develop a structured training plan based on the employee's role ☐
- Assign a mentor or buddy to provide guidance and support ☐
- Schedule relevant training sessions, workshops, or webinars ☐
- Provide access to any necessary learning resources or materials ☐
- Encourage participation in cross-functional projects or teams ☐
- Monitor progress and provide feedback on performance ☐

INTEGRATION AND TEAM BUILDING:

- Schedule regular team meetings or check-ins to keep the new employee informed ☐
- Encourage collaboration and interaction with colleagues ☐
- Organize team-building activities or social events to foster relationships ☐
- Promote a culture of open communication and feedback ☐
- Provide opportunities for the new employee to present their work or ideas ☐

PERFORMANCE MANAGEMENT AND GOAL SETTING:

- Set clear expectations and objectives for the new employee's role ☐
- Establish performance metrics and Key Performance Indicators (KPIs) ☐
- Schedule regular performance reviews and feedback sessions ☐
- Assist the new employee in setting short-term and long-term goals ☐
- Offer support and resources to help the employee achieve their goals ☐

ONGOING SUPPORT AND DEVELOPMENT:

Maintain open communication channels for questions and concerns

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Provide ongoing feedback and recognition for achievements

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Encourage continuous learning and professional development

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Identify opportunities for career growth and advancement

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Regularly review and update the onboarding process based on feedback

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Remember that this onboarding and integration checklist can be customized based on your specific needs and the nature of your organization. The goal is to create a smooth and effective onboarding process that ensures the new employee feels welcomed, supported and set up for success.