

Staff onboarding checklist

A smooth employee onboarding process is crucial for a positive employee experience. From ensuring that new starters send over relevant employee documents to scheduling meetings with managers during their first few weeks, HR teams have many tasks to manage for an effective onboarding experience.

There is always room to enhance your employee onboarding process. With complete HR and employee onboarding software like [Paismo](#), you can create a seamless onboarding experience for new starters, save time, and improve efficiency.

As you consider the benefits of automating your onboarding processes, use our free new staff onboarding process checklist. This resource will assist you in onboarding new employees (including hybrid and remote workers), helping them reach full productivity as quickly as possible, and boosting your retention of new talent.

First impressions count. Your employees' onboarding experience can have a big impact on their long-term engagement, performance, and overall satisfaction. Is your current program up to par? Running a survey after new hires' first 30 days can give you the feedback you need to improve your onboarding process moving forward.

These four stages of the onboarding process, from the preboarding, the first day, the first week and the first month, is important to personalize the onboarding experience for each new starter individually.

To discover how Paismo simplifies and provides the fastest onboarding, [schedule a demo](#) and take a product tour.

1. Preboarding

HR ACTION	Completed
<p>Contacting new starters before joining</p> <p>Verify the start date and time with your new hires. Inform them of where they should go first in the office, or if they will be working remotely, let them know what time they should log in. Additionally, reassure the new starters that you are available to address any questions they may have before their start date.</p>	<input type="checkbox"/>
<p>Make sure you have relevant employee documents</p> <p>From copies of the new starters' passports (for the right-to-work check) to further proof of identification, you need to make sure the new starters provide relevant documents before their start date (or on their first day) - if you use specialist HR software, new starters should be able to upload documents online, including contact details, references, and next of kin information.</p>	<input type="checkbox"/>
<p>Contact existing managers and employees</p> <p>Let current employees and managers know that new employees will be starting soon. Inform them of the employees' names, job roles, start dates, and who the new starters will be reporting to. This communications should simply remind employees to be welcoming and aware of the new starters</p>	<input type="checkbox"/>
<p>Assign a buddy</p> <p>Ask existing employees if they would like to be a buddy or assign an employee to this role. Let them know what the purpose of being a buddy is and what they should do to support the new starters</p>	<input type="checkbox"/>
<p>Prepare desk and equipment</p> <p>If the new starters are working from the office, make sure the desk is set up along with the laptop and any other equipment (eg company mobile), and ensure that all relevant software licenses and system access is ready and available from day-one. Alternatively, if they're working remotely, make sure any equipment is prepared beforehand with the support of IT, and sent to the employees' address. Also make sure to ask what the new starters' work setup is like at home and if they need another screen to work from or other equipment to assist them.</p>	<input type="checkbox"/>

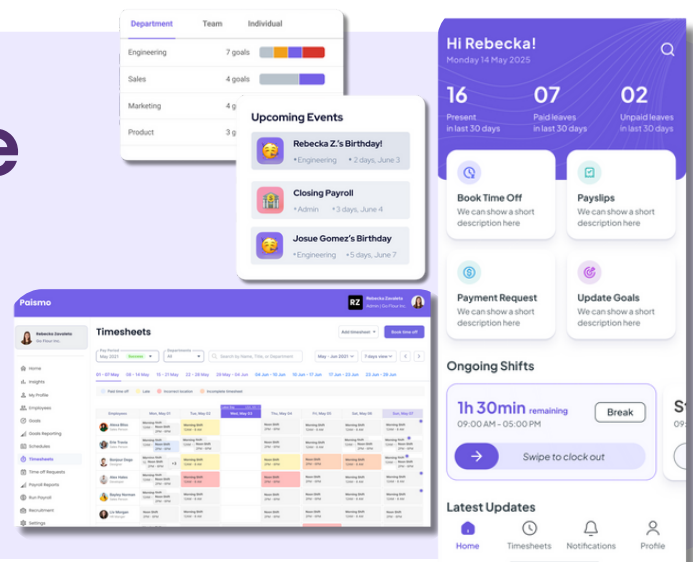
1. Preboarding

HR ACTION	Completed
<p>Order pass key and ID</p> <p>Make sure you have a pass key and ID card ready for the new starters on their first day.</p>	<input type="checkbox"/>
<p>Put together a welcome pack</p> <p>Warmly welcome new starters by putting together a welcome pack. This can include gifts which help the employees feel comfortable on their first day - eg company branded notebook and pen, water bottle, or even a pack of biscuits to have with the tea or coffee runs.</p>	<input type="checkbox"/>

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2. First day

HR ACTION	Completed
<p>Give a workplace tour</p> <p>Show your new starters around their workplace to help them feel comfortable and familiar in the new environment. If new starters are temporarily working remotely, you can provide an office tour when they are in the office</p>	<input type="checkbox"/>
<p>Introduce colleagues</p> <p>During the tour, or after it, introduce your new starters to their colleagues and get each colleague to introduce themselves and briefly explain their role.</p>	<input type="checkbox"/>
<p>Set up work equipment</p> <p>Ensure that the new starters have the correct login details needed for everything that requires access – where necessary, work with IT to ensure this access is provided in advance. Where employees are expected to work with software that they might not be familiar with, arrange training, either in person or via video, training course or written guide.</p>	<input type="checkbox"/>
<p>Go through employee handbook</p> <p>Set some time aside for you or another member of the HR team to take the new starters through the employee handbook. Present your work policies, procedures, code of conduct and more in a meeting so that your new employees know everything they need to and give them an opportunity to ask questions.</p>	<input type="checkbox"/>
<p>Make sure colleagues socialise with the new starters</p> <p>A good way to ensure everyone gets along is to set up meetings or coffee catchup sessions where they can take some time away from the workplace environment to get to know each other.</p>	<input type="checkbox"/>

3. First week

HR ACTION	Completed
<p>Schedule meetings with key people</p> <p>Book a meeting between your new starters and key members of the senior leadership team or department heads who can take employees through the goals of the organisation and explain how each department or business unit works. If the CEO is unavailable for a meeting with new starters, try to arrange a video welcome where the CEO introduces themselves and shares more about the history and values of the organisation.</p>	<input type="checkbox"/>
<p>Check in with new starters</p> <p>Visit the new starters face-to-face or have a virtual call if working remotely during the week to simply check in and see how they are finding their week so far, and if they are struggling with anything. Remember, they will have a lot of new information to process, so a friendly hello is always appreciated.</p>	<input type="checkbox"/>
<p>Organise and schedule relevant training</p> <p>Get new starters to increase their knowledge and complete relevant training during their first week when they aren't in meetings.</p>	<input type="checkbox"/>

4. First month

HR ACTION	Completed
<p>Be on hand to answer any questions</p> <p>Drop a message to your new starters and remind them that you're on hand to hear their concerns or to support them with any issues they may be having so far. If new starters are struggling with their mental health, don't forget to direct them to helpful employee assistance programs.</p>	<input type="checkbox"/>
<p>Create objectives</p> <p>Remind managers to provide a clear set of objectives for new members of their team and to schedule reviews of these objectives at regular intervals.</p>	<input type="checkbox"/>
<p>Encourage employees to review the onboarding process</p> <p>Once your new starters have settled into their roles, ask them if they are happy to review the onboarding processes they went through and to provide you with feedback on areas which they think can be improved. Such feedback can help you perfect your onboarding processes and satisfy future new starters.</p>	<input type="checkbox"/>

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