Pre-Onboarding Checklist

Pre-Onboarding Checklist for HR Teams

Before the New Employee's First Day:

[ ] Send Welcome Email: Send a personalized welcome email to the new employee, providing details about their first day, schedule, and any necessary information.

[ ] Prepare Paperwork: Prepare all necessary documents such as employment contract, company policies, tax forms, and any other required paperwork.

[ ] Coordinate IT Setup: Ensure that the new employee's computer, email, and software access are set up and ready for their first day.

[ ] Schedule Orientation: Coordinate the date and time for the new employee's orientation session, including an overview of the company's mission, values, and culture.

[ ] Arrange Workspace: Ensure that the new employee's workspace is clean, organized, and equipped with necessary supplies.

Communication and Engagement:

[ ] Introduce Team: Send an introduction email to the new employee's team members, including a brief introduction and their role within the team.

[ ] Assign Buddy/Mentor: Assign a buddy or mentor to help the new employee acclimate to the company culture and answer any questions.

[ ] Send Pre-Reading Material: Provide any relevant pre-reading materials, such as company handbooks or training resources, to help the new employee get familiar with the company.

[ ] Share Agenda: Share the agenda for the new employee's first day, including meetings, training sessions, and any other activities.

Logistical Arrangements:

[ ] Schedule Facilities Tour: Arrange for a tour of the company facilities to help the new employee become familiar with the layout.

[ ] Set Up Security Access: Ensure that the new employee has the necessary security access cards or badges to enter the premises.

[ ] Arrange Parking: If applicable, provide information about parking arrangements or transportation options.

[ ] Provide Dress Code Guidelines: Communicate the company's dress code and any specific requirements for the new employee's role.

Final Checks:

[ ] Verify Paperwork: Double-check that all required paperwork and documents have been prepared and are ready for the new employee to review and sign.

[ ] Confirm Orientation Schedule: Verify that the orientation schedule, including timing and location, is confirmed and communicated to the new employee.

[ ] Review First-Day Agenda: Go over the first-day agenda with the new employee, ensuring they are aware of the schedule and expectations.