

## EMPLOYEE INFORMATION

Employee Last Name	Employee First Name	Job Title
Start Date	Department	Manager

## WELCOME PACKET

Welcome packet sent to new hire, including:

Welcome letter	Forms to Complete
First week schedule	I-9
What to expect on first day	W-4
Employee handbook & acknowledgement	Employee Information Form
Benefits information	Direct Deposit Authorization
New hire survey	"About Me" questionnaire for new department

## INTERNAL COMMUNICATION

Payroll notified	IT Notified
Facilities notified	Preferred name for email
Reception notified	Hardware & software needed
Benefits notified	Accounts, drives, calendars, and groups needed

## NEW HIRE SET-UP

Desk Ready	Items Ready
Desk cleaned up	Building access / keys
Computer set up	Phone
Welcome card & gift	Phone list
Company swag	Business cards ordered
Office supplies	Office map & org chart
Name plate	Cell phone (if applicable)

## ONBOARDING APPOINTMENTS

Onboarding Appointments Scheduled

### First Day

- Arrival welcome by manager and/or buddy
- Welcome coffee with team
- New hire paperwork
- Company policies & norms
- IT orientation
- Office tour
- Lunch with manager or buddy
- Self-directed time to settle in

### First Week

- Benefits orientation
- Health & safety orientation
- Introductions with key individuals
- Company values and culture
- Self-directed time for review and learning
- Administrative procedures (purchasing, etc.)

### First Month

- Overview of departments
- Company mission and strategy
- Company social events
- Software trainings
- Other required trainings
- Other identified trainings

## PREBOARDING CHECKLIST FOR MANAGER

### Communication & Building Networks for New Hire

- Send welcome email to new hire, congratulating them and letting them know how to reach you for any questions.
- Email department to announce new hire, including start date, new role, background and where they will be located.
- Encourage team to reach out to welcome new hire via LinkedIn or email.
- Assign a buddy – a peer to the employee who would be a good mentor and resource in the first few months
- Identify key individuals for employee to schedule meetings with in first week/month

### Technology

- Communicate to IT any technology needs
  - Drives they will need access to
  - Calendars, groups or mailing lists they need to be added to
  - Software they will need (productivity tools, job related software, etc.)
  - Accounts to existing systems that they will need
  - Special computer hardware they will need for their role or known accommodations

### Meetings

- Schedule time to be available for new hire during their first week
- Add to ongoing team and department meetings (once email set up)
- Set up times to meet with employee during the first week to go over:
  - Job role and expectations
  - Department overview
  - How employee's role contributes to the overall company mission and strategy

### 90 Day Success Plan

- Build out a 90-day success plan for employee, including:
  - First assignment so they have early success
  - Identify goals for 30/60/90 days
  - What success looks like at 30, 60, and 90 days
  - Outline training and development for 30/60/90 days