

Onboarding Checklist for Small Business



The onboarding process sets the tone for employment with an organization, so it's something that every company should invest in to provide a better experience for new hires. A positive onboarding experience can also lead to improved job performance, increased efficiency, and better satisfaction, which all play a role in engagement and retention.

Follow this checklist to make sure your onboarding process checks all the boxes.

1

Before Day One

- Prepare (and send) new hire paperwork**
If possible, provide any necessary forms in advance of the first day to streamline the process.
- Provide all necessary equipment**
Prepare the employee's computer, mouse, monitor, etc., along with any other must-haves (mobile or desk phone, tablet, access to shared devices, etc.).
- Set up their workspace**
Having an employee's desk (or other workspace) set up and ready is a nice touch that helps them feel at home from the moment they arrive.
- Establish accounts and logins**
If a new hire needs accounts or logins, establish those in advance so they can get started right away. Examples include access to the WiFi, email inbox, timekeeping system, project management software, and any other technology needed in their job.
- Create a plan for their first week**
Depending on the role, a new hire may need extensive training or simply to meet with other members of the team upon starting. Plan out the first week of work so they know what to expect and when to arrive each day.
- Send an email**
Provide all the details for the new hire in advance of their first day, such as their arrival time, schedule, parking or building information, dress code, etc.

2

On Day One

- Greet the employee**
When your new hire arrives, meet them in the lobby or at front door of the office. You can greet a remote employee with a video or phone call.
- Give a tour**
Provide a tour of the office, pointing out key spaces, such as the break room, restrooms, and their workspace.
- Review key documents**
If you provided new hire paperwork in advance, you can collect the completed documents on the first day. You may also need to review policies and procedures, including the employee handbook, benefits and enrollment options, safety regulations, and rules around technology and equipment usage.
- Assign a mentor**
Having someone to ask questions of or request help from can make a big difference for a new hire's comfort level, so assign a co-worker to serve as a mentor for the first few weeks.
- Provide a welcome gift**
It's always nice to feel welcome, and offering even a small token can help your hire feel good about their new role. Examples include company-branded water bottles, apparel pieces, office supplies, and other useful items.
- Introduce them across the organization**
Prepare and send an email to the entire workforce to encourage employees to welcome the new hire and support them in their new role.

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After Day One

- Schedule regular check-ins**
As the new employee starts their new role, it's helpful to check in regularly, so schedule chunks of time regularly throughout the first 90 days to see how things are going and find out if they need anything else.
- Request feedback**
It's impossible to improve your onboarding process if you don't know what works and what doesn't. Ask for feedback from every new hire to fine-tune the steps for the future.

Start Doing More

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