



The only  
employee  
onboarding  
checklist you  
will ever need

**roubler.**

# An engaging employee experience starts at the beginning



Onboarding, induction, orientation – whatever you choose to call it, there's no escaping the fact that how you welcome new staff to your team plays a huge part in their engagement and performance over time.

Many businesses lay a solid foundation for *customer* onboarding, introducing them to the product or service they've just signed up for and demonstrating how valuable this new relationship is going to be. So why don't more businesses give new *employees* the same quality experience?

You don't get a second chance to make a good first impression. Most employees believe the onboarding process sets the tone for their ongoing experience and culture within a business – yet many employees are on the hunt for a new job within their first six months.

Finding the right candidate is a long and costly process in itself. You don't want to lose the talent you've just hired because of a poor onboarding experience.

Remember, you're not just hoping you've hired the right candidate – they're also hoping they've joined the right team. This is your chance to show your new team member that the grass is already green.



Onboarding an employee goes far beyond just day one. When executed well, a good onboarding process benefits your entire team in the long run.

This interactive checklist will help you understand exactly what to do before, during, and after welcoming a new employee, as well as providing some handy templates and tips for going the extra mile.

## Two weeks before their first day

Often overlooked, an employee's pre-boarding should include general setup and admin tasks. Completing these before a team member starts means you will have more time to provide a warm welcome when they arrive.

Ensure their contract is signed and both parties have a copy.

Set up their work email address and add it to the relevant email groups within the business (e.g. [australia@companyname.com](mailto:australia@companyname.com), [customerservice@companyname.com](mailto:customerservice@companyname.com)).

Set up their access to the relevant communication channels used by the team (e.g. Slack, Microsoft Teams).

Set up their access to the management or collaboration systems used by the team or department they will be joining (e.g. Roubler, Trello, Asana).

Order or gather any essential stationery.

Order the computer hardware, tools or devices they will need to do their job, and ensure the necessary software is installed. If you're not sure, ask their manager or fellow team mates what they might need.

Set up their employee portal or intranet access.

Set up printer and scanner connections on their device.

Prepare a digital list of the various logins they will need.

Set up their desk phone and extension number.

Set up their employee access card or PIN for entering the office.

Prepare a parking permit or assemble the information they will need to obtain one.

Order their business cards.

Prepare a welcome pack for their first day (e.g. company branded swag, uniform, name tag, company brand guide, company handbook and policies, handy how to's for office hardware and electronics).

Plan the agenda for their first week, including social activities with the team and some initial work and admin tasks.

Schedule the day and time of their arrival in your calendar, and that of any relevant team members, so that everyone is available and prepared.

Send them a welcome email to their personal email address to confirm their start day and time, office address, parking access, dress code, and agenda for their first day. Include a link to their online onboarding, so they can enter all their relevant details and documentation before their first shift. **[Click here to view a welcome email template.](#)**



## Day one

Give them their welcome pack.

Ensure they have completed their online onboarding process, including bank details, tax file number and superannuation info, emergency contact details, visa documentation etc. Once this is set up, this will automatically feed into payroll to help you avoid double-handling of information.

Provide them with the Fair Work Information Statement and relevant modern award information.

Conduct an office or building tour, including bathrooms, meeting rooms, supply or stationery room, reception and emergency exits. Do this even for remote employees to make them feel part of the team.

Give them a rundown of the company history and values, milestones achieved and to be achieved, any flexible working arrangements, policies and procedures, employee benefits, birthday perks, upskilling and development programs, team building activities, and local haunts, and make sure they're all clearly understood.

Reiterate the tasks, responsibilities, KPIs and bonus structures for their role, as per their position description and contract.

Clarify their onboarding roadmap so they know what to expect from the coming days and weeks.

Clarify any upskilling or development opportunities that may be relevant to their role, and ask if there are any they might be interested in.

Add them to any relevant recurring meetings they should attend, and explain what each of them are for.

Set up their email signature.

Send a team-wide email welcoming them to the company. **Click here to view a welcome announcement email template.**

Schedule regular check ins. We recommend weekly check ins during their first month.

## Week one

Talk to them about their overall goals and expectations. We recommend discussing their personal and professional development at this stage.

Remind them of their probation period, schedule their probation review, and explain what can be expected from the process.

Organise a product or service demonstration hosted by the relevant departments.

Conduct emergency, workplace safety and first aid orientations.

Conduct any relevant software or system training sessions hosted by the relevant departments. Do this even if they have experience using these systems, as your team might do things differently.

Organise a casual team meet-and-greet, and explain who does what in the business in terms of work roles and other duties (e.g. fire warden, team sports facilitator). Try to break up the local and inter-state or global teams so it's not too overwhelming.

Coordinate a 1:1 session between the employee and members of the senior leadership team, as well as the CEO.

Give them their first work tasks to complete. We recommend providing them with simple, straightforward tasks, and being present and providing guidance for each of these initial tasks.

Update the organisational chart.



### Key statistics you should know:

- 78% of businesses investing in onboarding reported increases in revenue.
- A strong onboarding process can improve employee retention by 82%.
- 33% of employees hunt for a new job within their first six months.
- The cost of losing an employee can be up to twice their annual salary.
- 51% of employees would go "above and beyond" if they had good onboarding.

People are generally excited about starting a new job and are keen to do their best and have a positive impact on the business, so don't let that enthusiasm wane. Make their first weeks and months not only memorable but also full of clear and useful information that will help them thrive in their role.

## Weeks two to four

Add them to the "our team" section of the company website.

Give them more challenging tasks and provide them with more freedom to conduct these tasks to see how they fare on their own, but remain present for guidance and assistance.

Conduct their first general check in. **Click here to view a general check in questions template.**

Find out more about how they're doing from their team mates and managers.

Schedule regular check ins and 1:1 sessions with their manager. We recommend fortnightly or monthly check ins after their first month up until their sixth month.

## Weeks five to eight

Give them even more challenging tasks. We recommend giving them more freedom and ownership of these tasks to build their confidence and autonomy, but remain present for guidance and assistance.

Coordinate a manager's check in and 1:1 sessions. **Click here to view a manager's check in questions template.**

Conduct a follow-up survey on their onboarding experience. **Click here to view an onboarding follow-up survey template.**

Schedule in a constructive review of their initial performance and KPIs suitability.

Remind them of their probation review date.

# Inspiration for going the extra mile

## **Provide a small gift from the team (e.g. a greeting card, a personalised gift, a small plant).**

Show them you care and are excited to have them on the team from day one and let them have a memento from their first day.

## **Decorate their desk (e.g. welcome sign, balloons).**

Show that their workspace (and ultimately their work) is important to the team.

## **Take them out for breakfast or lunch with the team (or at least with their department).**

This shows that your team culture is a top priority and everyone can make time to meet and get to know a new team member.

## **Demonstrate the company's product or service offering with a real-life or role-play exercise.**

Your employees are your best advocates whether they work directly with the product or service, or not. The best way for them to understand what your business does is to truly show them.

## **Give them a shout out on the company's social media pages.**

This act of kindness is not only for your new team member, but also for your business. Existing and potential customers often keep an eye on your company's social media activity, so showing them you care for your team helps humanise your brand and present a positive image to others.

## **Assign them a peer buddy.**

Having a peer buddy is a great way to help them mingle with colleagues faster and pick up certain tips and tricks from a fellow peer. We recommend assigning a peer buddy who has been with the company for at least one year and is from a different department, so they can learn about other aspects of the business.

## **Coordinate a 1:1 welcome breakfast or coffee catch up with the CEO.**

If the boss makes time with a new recruit, it shows that they truly want to get to know their new employee and learn about their goals within the business. CEOs can also use this time to establish their expectations, deliver the company vision, and get a fresh perspective from a newcomer.

## **Encourage cross-pollination between different departments.**

Cross-pollination during an onboarding period helps break down departmental barriers and encourages teams to not only work together more collaboratively from the beginning, but also better understand what goes into each others' daily work and opens up smoother lines of communication.

## **Identify issues or roadblocks and solve them early.**

As soon as you identify a new employee's work-related issue or roadblock, actively take steps to solve them. This will eliminate the issue from building up or becoming worse, making them less overwhelmed and more productive.

## **Ask often and in-person: "What do you still need/What do you need more of?"**

As new employees start getting into a regular work pace, it's often easy for even them to forget asking for help. By directly asking what they need, you're helping them be more comfortable and work more efficiently.

"The majority of our time and money spent on people is invested in attracting, assessing, and cultivating new hires."

Laszlo Bock,  
former Senior VP of  
People Operations, Google

"Building the muscle to hire great people is a huge competitive advantage."

Patty McCord,  
former Chief Talent Officer,  
Netflix



## Welcome email template

Send this to your new employee's personal email address a few days before their first day, clarifying the essential information they need to prepare and arrive on time.

Hi [first name]

We're all very excited to have you on board [your company name] and the rest of the team can't wait to meet you. Here are a few things for you to know for your first day.

Start day and time: [day, date] at [HH:MM am/pm]

Office address: [your full office address including floor and unit number if relevant]

Entrance access: [detail if there is a front desk, buzzer, or PIN code to enter the office, or if you will be meeting them at the entrance]

Parking access: [detail where they can park or if you have arranged on-premise parking for them and how to access this]

Dress code: [business casual/smart casual/business]

First day agenda: Office tour, workspace orientation, payroll onboarding, company information session (history, values, milestones, flexibilities, benefits, policies, procedures, development programs), lunch, meet the team, initial 1:1 session.

[Include anything extra that might be helpful or welcoming e.g. "Don't worry about bringing lunch on your first day because some of us will be taking you to a restaurant nearby."]

Before your first day please also complete your online onboarding process: [insert link here]

If you have any questions or concerns please don't hesitate to email or call me.

Looking forward to having your talent on our team and introducing you to everyone. See you soon!

Warm regards

[first name, last name]

## Welcome announcement email template

This email announces the arrival of a new colleague, clarifying their role and when they start. Send this business-wide once you have set up your new employee's work email so you can include them in the welcome announcement.

Hi team

Please help me give a warm welcome to our newest team member, [their full name]!

[Their preferred pronoun] will be joining us as a [their position title] in the [their department], starting from [their start date].

[Their preferred pronoun] will be working from [their workspace location in the office or remotely].

[If there is a team welcome breakfast/lunch/session, include the details of when and where here]

## General check in questions template

Use this template to ask your new employee some basic but important questions within their second to fourth week of starting. This helps you understand if there was any missing information provided, and gets early roadblocks out of the way so they can perform better. For any "No" responses, make sure to follow up.

Have you received enough information about your tasks and responsibilities?

Yes  No

Do you have everything you need to do your work?

Yes  No

Are the tasks you've been given too challenging or overwhelming?

Yes  No

Have you received enough training or orientation to use the software or systems relevant to your role?

Yes  No

Are you finding it easy to find resources to help you do your work?

Yes  No

Is your workspace comfortable?

Yes  No

Do you have a clear understanding of the company's product or service offering?

Yes  No

Have your team mates been welcoming and helpful?

Yes  No

## Manager's check in questions template

Use this template as a manager to ask your new employee more detailed questions about their role and responsibilities, within their second to third month of starting. This helps you understand if they are struggling with specific tasks, facing roadblocks, or coping with the pace and load of work.

How are you feeling about your role?

Are any of your tasks or responsibilities overwhelming or underwhelming you?

Is there anything or anyone slowing down your work?

Is there any additional or alternative training that could help you perform better?

Do you have all the resources and information that you need?

What are you enjoying most about work?

What are you enjoying least about work?

Have you felt welcomed by the team mates in our department?

Have you felt welcomed by the team mates across other departments?

How would you rate the team culture?

Are you still happy with the goals we established earlier on?

Do you think you are on track to achieve those goals?

Are we, as your immediate team, meeting your expectations?

Is the company meeting your expectations?

Was there anything I could have made better or easier from the start?

## Onboarding follow-up survey

Use this template to ask your new employee about their onboarding experience, within two to three months of their starting. This helps you understand what may have fallen short, can be improved or was missing entirely from the onboarding process, to make it a better experience for future hires.

I found the onboarding process very informative and useful.

Agree  Neutral  Disagree

I found the onboarding process or coordinators friendly and welcoming.

Agree  Neutral  Disagree

I received detailed information about my role, tasks and responsibilities.

Agree  Neutral  Disagree

I received useful information or training on the software or systems relevant to my role.

Agree  Neutral  Disagree

The duration of the onboarding process was appropriate.

Agree  Neutral  Disagree

I have a thorough understanding of the company, its offering and its values.

Agree  Neutral  Disagree

I know enough about the different departments, functions, and roles within the business.

Agree  Neutral  Disagree

The team was friendly and welcoming.

Agree  Neutral  Disagree

The onboarding experience matched the team culture or values.

Agree  Neutral  Disagree

I would recommend working at this company to others.

Agree  Neutral  Disagree

The work experience after the onboarding experience was:

Better  The same  Worse

My favourite part of the onboarding process was:

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My least favourite part of the onboarding process was:

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Some improvements I would suggest for the onboarding process include:

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# Find out more

Want to learn more about automating your onboarding process?

Call us on +65 3163 6786  
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[www.roubler.com](http://www.roubler.com)