Onboarding Checklist for Administrators & Receptionists

PRE-ARRIVAL

- ☐ Call new employee to inform them of their start date
    - ☐ Answer any questions they might have
    - ☐ Provide information on first-day expectations (dress code, what to bring etc.)
- ☐ Prepare onboarding pack (employee handbook, gifts, contact list of key people)
    - ☐ Post onboarding pack to employee
- ☐ Schedule key meetings for first week
- ☐ Create a training schedule for induction/probation period
- ☐ Create key milestones for the year
- ☐ Prepare new employee's workspace
    - ☐ Order/set-up work computer/laptop/phone
    - ☐ Set up voicemail
    - ☐ Send access request to IT for shared drives/folders
    - ☐ Request new employee to be added to internal email groups
    - ☐ Order office supplies
- ☐ Order security swipe card or keys
- ☐ Make team aware of new employee's arrival
- ☐ Set-up welcome lunch with team
- ☐ Assign a welcome "buddy"

FIRST DAY

- ☐ Welcome your new employee at reception
- ☐ Introduce them to your team
- ☐ Provide a tour of the workplace (work/department areas, restrooms, printers, conference rooms, water coolers, kitchen areas, break rooms, cafeterias and vending machines)
- ☐ Lunch with the team (or in the week if this isn't possible)
- ☐ Explain the team's role and where the employee fits in (have a copy of employee's job description)
    - ☐ Describe organisation's goals, objectives and function
    - ☐ Explain the chain of command (who the employee reports to and who their manager reports to)
- ☐ Review telephone processes and policy
    - ☐ Team and department contact numbers
    - ☐ Dialling instructions for commonly called local/regional/international numbers
    - ☐ Instructions for conference call or webinars
    - ☐ Personal use policy
- ☐ Review IT procedures and policy
    - ☐ Network and remote email access
    - ☐ Intranet
    - ☐ IT support and logging support tickets
    - ☐ IT security and personal use policy
    - ☐ Social media policy
- ☐ Explain health and safety and emergency procedures
    - ☐ Show fire exits and emergency evacuation points
    - ☐ Introduce new employee to first-aiders and fire wardens

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FIRST WEEK

- ☐ Provide three month plan
  - ☐ Set first month priorities
  - ☐ Identify training requirements
  - ☐ Set three month milestones (goals, objectives etc.)
  - ☐ Book review meetings
- ☐ Go over industry and companywide acronyms
- ☐ Reaffirm job duties and expectations to employee and indicate point-of-contact if they need help
- ☐ Review HR and Admin policies
  - ☐ Work schedule
  - ☐ Break and lunch periods
  - ☐ Overtime policy, if applicable
  - ☐ Processes for requesting leave
  - ☐ Provide contact for HR

THREE MONTHS & BEYOND

- ☐ Provide feedback to employee at designated times
  - ☐ Solicit feedback from employee to ensure expectations are being met
  - ☐ Solicit feedback from team on employee's performance and working relationships
- ☐ Encourage your employee to participate in team meetings and events
- ☐ Continue looking for opportunities to further integrate your employee into the business

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