***Onboarding ninety-day checklist***

This onboarding process will help you plan your new employee’s first 90 days at your organization. It will cover the basics and break them down into small achievable goals and tasks.

A thoughtful onboarding process will set up new hires for success and not overwhelm them. There are essential tasks and interactions that are the basics of onboarding. The following will help new hires understand how to be successful in their roles and how their work contributes to the organization’s goals.

The first day

The first day should be focused on learning about their role and the organization, getting acquainted with the team, and familiarizing themselves with their workspace.

###  Make introductions to key colleagues on the team.

Give a tour of the assigned workspace and the rest of the office/facility, including:

Where to put belongings. Where to hang coats.

Where to store lunch. Location of the washrooms.

Location of the fire exits. Location of the first aid kit(s).

Location of the photocopiers, fax machines, supplies, etc.

### Review the role and its responsibilities, including:

Expected outcomes and/or how success in the role will be measured, such as Key Performance Indicators.

Work to be accomplished in the first days/ weeks.

Relevant reports and information needed for the job.

Review schedule information, including start and finish times, lunchtime, and breaks.

### Review HR and administration procedures, including:

Necessary paperwork for pay and benefits. Probationary period.

Employee policies and procedures manual. Travel and reimbursement processes.

Absences, leave, vacation, etc.

Telephone and email protocol, internet use policy.

Review health, fire, and safety procedures.

Review diversity, equity, and inclusion and anti-harassment policies and procedures.

The first week

The rest of the week is for the new employee to ease into the role and absorb all the new information. The focus is to communicate expectations, plan goals together, and set the tone of their time at the organization.

Connect the new hire with a mentor or onboarding "buddy" and colleagues.

Review the performance management system and learning and development plans. Explain the internal communication processes, including staff meetings.

Provide an organizational overview, and explain how the job relates to other roles in the organization.

Identify the key people who will be training the new hire, and schedule those sessions in their calendar.

The first few months

At this point, new employees should be more comfortable in their roles and with the organization. This is the time you focus on long-term responsibilities and align their performance toward strategic and operational objectives.

Make team building and employee engagement a priority to ensure new hires don’t feel ignored.

Create opportunities for working relationships to develop and prosper.

Encourage new hires to set up meetings to discuss their work with you and the team. Check in and solicit feedback on their onboarding experience.