



# New Hire Checklist

## Stage One: Preparation

There's a lot to do after that official offer letter is signed. Here's a checklist to help you get started without dropping any of the details:

- Order business cards
- Request or buy equipment: desk, chair, monitor, keyboard, trackpad, etc.
- Setup access to company tools: email, Slack, other software tools, etc.
- Assign culture buddy: person in a similar position to answer informal questions
- Provide benefit information: health, dental, vision, and contact for questions
- Communicate start time for the first day
- Provide parking or commuting information for the first day
- Setup desk and tools for the first day
- Provide company SWAG (t-shirts, notebooks, pens, etc.) or a small gift for the first day
- Schedule lunch for first and second days

## Stage Two: Welcome Email

Sending a welcome email sets the right tone for this new relationship and introduces the new hire to your company culture. It's also a great way to accomplish some of the items in the preparation checklist above and check off two more:

- Write welcome email
- Send welcome email

Here's a **sample welcome email** we use at Gaslight:

Hi Haley,

I'd like to introduce myself, I am Merrilee, and I'm your chief environment attendant and stewardess of all things wonderful, otherwise known as, Office Manager. On behalf of our entire crew, welcome aboard! Dewayne informed me that you'll be joining us as of 5/5/16. We're so excited you're joining our team! I will be helping you through your onboarding process, and I look forward to meeting you!

I'd like to direct your attention to the list below, this email will include super valuable information like:

- Benefits explanation/rates
- What you need to get started
- What you need to bring your first day
- What to expect your first couple of days
- Fasten your seat belt. Here we go!

### Is this you?

I need to confirm your phone number and the correct spelling of your name for your business card. Is this correct?

Haley Smith  
222-222-2222

## **Benefits**

Gaslight covers the cost of employee benefits I've included plan information and a rate guide in case you wanted to add a spouse or dependent. If you have questions, please hit the stewardess button (just email me).

## **Equipment**

We value individualism, so we don't tell people what laptop to buy, other than it needs to be a Mac. Gaslight covers the cost of a new laptop. You're welcome to buy what you want. Save your receipt so we can help you submit your first expense report for your reimbursement.

## **What to bring on your first day**

You will be filling out all of your personnel and benefits information on your first day so please bring the following documents:

- Valid Driver's License
- Social Security Card or Passport

## **Itinerary**

Here is a general outline of your first two days so you know what to expect.

INCLUDE AGENDA (SEE SAMPLE BELOW)

Part of your journey here begins with a "best buddy". We call these special people, culture buddies (cute we know!). Your culture buddy is Kenny. He's excited about helping you along in learning what it means to be a part of our team.

## **Stage Three: First Day Agenda**

First impressions count. Take the time to think through your new hire's first day, so he or she isn't sitting alone at a desk while everyone else is in meetings.

- Create the first-day agenda
- Organize people and resources for agenda

Here's a **sample first-day agenda** from Gaslight:

**9:00 - Welcome**

- Coffee
- Get to know one another
- Overview of the week/month

**9:30-11:45 - Office Tour and Getting to Know Us**

- Tour
- History of Company
- Introduction to the team
  - Welcome Team: Kenny, Merrilee, Lauren, Kevin
- Huddle Room:
  - Overview of current work/clients
  - Discussion of core values
  - Company Vision
  - Company Structure
    - Organizational/Accountability Chart (draw on a whiteboard)
    - Composition of teams
  - How We Work
    - What makes us unique
    - Proven Process
    - Our Guarantee

**11:45 - Company-Wide Stand Up Meeting**

**12:00 - Welcome Lunch**

**1:30 - Personal Time**

**2:30 - Paperwork/Questions**

- Office Manager

**4:00ish - End of Day 1: We did a lot! Review/answer questions**

- Meet and talk about how the day went

## Stage Four: Day Two Agenda

You started day one strong! Follow it up with a great second day. It's a great time to dig a little deeper into topics from day one and set your new hire up for success.

- ❑ Create a day two agenda
- ❑ Organize people and resources for agenda

Here's a **sample day two agenda** from Gaslight:

### 9:00 - Day 2 Good morning!

- Coffee
- Any thoughts on the previous day?

### 9:30 - How we get things done

- Introduction to the tools we use
- Making sure they have access
- Introduction to the Employee Handbook

### 11:45 - Company-wide stand-up meeting

### 12:00 - Lunch with CEO

### 1:30 - Destination: Learning Path

- Layout and talk about their role-specific onboarding plan.
- Set out the objectives for the rest of the week.

### 4:00 - End of Day 2: Get some rest, the real work starts tomorrow!

- How did Day 2 go? How did we do?

## **Stage Five: Additional Steps**

- Announce new hire to local business media
- Add to employee section of the website
- Follow-up on any final paperwork
- Ask for feedback about the onboarding process