

Onboarding Checklist

Onboarding is crucial to make a good first impression and make sure new hires stay for the long run. That's why you should ensure you haven't missed any onboarding steps for your new hire. At Charlie, we've put together a scalable process to fit our growing business, and we hope this checklist will help yours too.

For more information on how to tick all of these boxes, make sure you check out [our blog](#).

1. Pre-onboarding

- Send contract and get it signed
- Order and set up new equipment
- Get new hires to upload P45 and passport into [CharlieHR's software](#) and fill in New Starter form
- Set new starters up on platforms and send invites to Slack channels, Trello, etc.

2. First Day

- Send a welcome email
- Introduce new hires to the company policies, company values and ways of working
- Organise a team lunch or virtual coffee with other team members

3. First Week

- Make and share a plan for training with milestones
- Share a clear role document with the new hire to set expectations
- Arrange for the new hire to meet key members of the company to learn about what they do

4. First Month Until the End of Probation

- Make sure the new hire settles in their roles and reaches the milestones
- Do regular check-ins to see what they might be struggling with and follow-up to offer support
- Address any potential issues immediately so they can be on the right track to complete probation successfully

5. Beyond Onboarding and First Year

- Gather feedback regarding the onboarding process to make possible adjustments
- Help team members to work on their personal development and support their progress with the help of a [career progression framework](#)