

Induction Checklist

Adapt this template to meet your new starter's needs.

Name	
Job Title	
Start Date	
Probation Date	

Before New Starter Joins

Description	Person Responsible	Notes	Signature	Date
Send useful literature (company e-newsletter, welcome pack, links to corporate videos).				
Email Training Needs Analysis (TNA) document. Arrange training accordingly.				
Provide opportunity to meet the team.				
Computer equipment set up with logins and passwords ready.				
Office furniture ready, including telephone, desk and chair.				
Send email to team in advance, informing them of new joiner's start date.				
Email or call new starter to make sure he or she is ready for first day.				
Print off seating plan, site map and organizational chart.				
Choose a mentor or "buddy."				
Schedule one-on-one meetings in advance.				

Day One

Description	Person Responsible	Notes	Signature	Date
Send company-wide "welcome" email.				
Do a "walk-around" the office introducing new starter to key people, mentor and team.				
Show workstation, bathroom, water-cooler, kitchen, fire escapes etc.				
Complete essential admin (e.g., sign contracts, health and safety information, payroll forms, emergency contacts etc.).				
Provide company, department and team overview.				
Run through job description and person specification. Give team member copies.				
Discuss training needs based on TNA document.				
Provide key contact information (telephone, email and Skype addresses).				
Offer to arrange team lunch.				
Give new joiner a copy of this induction checklist.				

End of First Week

Description	Person Responsible	Notes	Signature	Date
Introduce new starter to any remaining key contacts.				
Go over job role in more detail. Discuss short-term training needs and opportunities for future development.				
Get new starter to carry out some tasks.				
Set objectives between now and end of probation and explain how performance will be assessed.				
Make sure new starter understands terms and conditions, practices and policies (such as annual leave, sickness, absence and disciplinary procedures etc.).				
Check with mentor all is well.				

During First Month

Description	Person Responsible	Notes	Signature	Date
Discuss training needs: mentoring, job shadowing or coaching?				
Provide and ask for regular feedback on the induction process.				
Discuss how the new starter is adjusting to the role and any concerns either party has.				
Monitor progress on objectives and timescales.				
Organize and carry out probation review.				