It’s all too easy for a new employee induction process to be inconsistent or haphazard. This is especially true if induction doesn’t start until the new employee arrives on day one. In this article, we gather several new employee induction checklists to help you avoid inconsistency and ensure your new employees hit the ground running.

Day zero induction checklist

This checklist applies to things which should occur before the employee’s first day. This is an often overlooked period. The new employee is often still working out their previous role. They will be increasingly thinking about their new role and organisation, often with apprehension. If you fail to communicate with the new employee during this period, any uncertainties they may have can grow into larger problems which become increasingly hard to fix during induction.

Alternatively, a good induction process will start preparing new employees well before day one. Ideally, your new employees will be looking forward to day one and keen to get going.

- **Arrival details.** This should include where, when and who will meet them on their first day, plus how they should dress and any tools or equipment they should bring.
- **Form completion.** The new employee should ideally return a range of forms to you before Day one including a signed copy of letter of engagement or employment contract, completed TFN declaration, completed Superannuation choice form, bank account details, emergency contact details, working visa (if required) and any licences held (as appropriate). Fair Work Australia has an excellent induction checklist for forms and Australian-related employment procedures too.
- **Welcome pack or course.** In addition to the arrival details, a welcome pack or course can be extremely valuable. A welcome pack should make the employee ‘feel welcome’. So this isn’t about policies or organisation history. It’s about helping the employee overcome any nerves or uncertainties, so that they feel like ‘part of the team’. This might include things like public transport details for your area, information about their team members, details on any employee benefits or social activities, information about local cafes or lunch options and so on.

Day one induction checklist

Day one is a big day for new employees. It can be very easy to overwhelm them. So consider what your objective of day one induction is. Is it to have them productive in their role? Probably not – that’s a big ask in the first few hours of a new employee.

Instead, your goal should be to confirm their decision to join your organisation. You want new employees leaving day one with excitement and engagement. For most people, this will be about ensuring they 'fit in'. If your new employee feels like they will fit in – and they know how to get to their workspace and team on day two – then they will start to relax and be ready for their new role.

- **Team introduction.** A large team introduction can be overwhelming, so is best done very briefly – a new employee will be unlikely to remember 5-10 team members names when all introduced at the same time. Instead, focus on a series of brief 1:1 introductions, with the manager or supervisor walking the new employee around to personally meet each team member for 5-10 minutes.
- **Buddy introduction.** New employees have many Managers and HR representatives can answer many of those questions, but it can also be extremely beneficial to have an assigned 'buddy' for new employees during the induction period. A buddy is a friendly face for the new employee and an information source of information and their team and the organisation. A buddy should be someone who knows 'how things work' across the organisation and are prepared to share that information.
- **Workplace tour.** Include first aid information, toilets, stationery cupboards, tea/coffee facilities, meeting rooms, fire fighting equipment, security controls and procedures, building access cards. Also include an explanation of evacuation procedures and meeting points, as well as an introduction to Fire Wardens, First Aid Officers, OH&S Committee
- **Workspace introduction.** Include building access and security requirements, access to email and phones, access to any filing or shared drives, and explanation of clean desk or clean workstation policies.
- **Welcome lunch.** Could be with manager or supervisor, induction buddy, key team members or the entire team.

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Week one induction checklist

After day one, you can spend the rest of the week covering off on the traditional new employee induction requirements. The items on this checklist should be spread out over the remaining days of week one. This allows your employee to start spending some time with their team, working out a few things on their own and getting their first new tasks completed.

Allowing time for on-the-job learning, in addition to these more formalised parts of induction, will allow your new employee time to learn, test and reflect on all aspects of their job through the first week. As such, an end-of-week lunch or debrief with their manager is often the perfect finish for week one.

- **HR introduction.** This should include dress code, sick or late procedures, applying for leave and key HR representatives and contact procedures.
- **Payroll introduction.** One of the easiest ways to put an employee offside is to short-change them or stuff up their first pay. Ensure all payroll details have been received and are correct.
- **Organisation overview.** This should include the history of the organisation, key senior roles and people, relevant organisational charts and reporting and the organisation culture, including mission, vision and values.
- **Workplace Health and Safety Induction.** This should include all relevant compliance training on workplace health and safety, as well as specific training from a supervisor or manager for the employee on their role. For office workers, this should include office ergonomics.
- **Performance overview.** This session should be run by the employee's manager or supervisor and include a review of the employee's duties, performance expectations and how performance will be reviewed.
- **First-week** This should be held on the last day of the first week. It would traditionally be with their manager or supervisor, but could also be with an HR representative or their buddy. A coffee or meeting is fine too. In any event, this is a time for the employee to reflect on their first week and ask questions to help them 'join the dots'. It's also an opportunity for their manager or supervisor to see if the employee has gained some critical knowledge…or if the induction process has overlooked some items.

Month one induction checklist

After week one, the employee will tend to 'get to work'. There will be significant informal on-the-job training occurring during month one. During month one, the new employee can also start to

- **Workplace policies and procedures.** This should include all key internal policies including topics like internet usage, privacy policies, anti-bullying and duty of care. Each role will also have specific issues to cover such as anti-money laundering or manual handling.
- **Informal on-the-job training.** This is the training received as the new employee receives and completes tasks. They will ask for help from managers and colleagues as

they go. Indeed, managers and supervisors should be diligent in ensuring new employees receive sufficient briefings for new tasks (rather than relying on assumed knowledge which only experienced employees may have).
- **Monthly reviews.** Ideally, the new employee should have a regular monthly review session with their manager or supervisor for the first three months. This allows the new employee to demonstrate their on-going proficiency and gives managers a chance to ensure the new employee is learning at the required rate. If this review is held only after three months, it may be too late to make any required improvements or changes…and lead to a difficult discussion for all parties before any probation period is finalised.

As you can see, new employee induction checklists bring focus and consistency. Once you have consistency, your induction processes are ready for efficiency too. That's where Tribal Habits plays a key role.

With Tribal Habits you can rapidly create a variety of custom induction courses and then plug-in topics from our Compliance library. When combined with self-enrolment rules based on staff demographics (like role, title or location), Pathways which group topics together for easy management of entire sets of learning, and notifications to managers and stakeholders, the entire induction process becomes efficient and effective.

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