Staff Induction Checklist

This staff induction checklist identifies the main aspects that need to be addressed at each phase of the induction for a new employee. Whilst the checklist is generic, we hope this will help you tailor the checklist to suit your organisation, including timescales.

Pre Employment

- Job offer made and accepted
- Start date and time confirmed to employee, manager and colleagues providing induction support
- Identify who will greet new employee on first day and who will support the induction programme
- Identify and order technology needed for the role e.g. computer, laptop and associated software, mobile
- Identify and order equipment needed for the role e.g. desk, safety gear
- Notify payroll of new starter contract employment details
- Assign company car where needed
- Create induction information pack
- Arrange first day
- Update internal records e.g. telephone directory, organisation chart
- Finalise Job Induction Programme and communicate to key support areas
- Send welcome message to new employee e.g. email, telephone, text

Day One: Complete Employment Administration

- Employment contract signed and returned
- P45, right to work, licenses and certificates obtained
- Bank details obtained
- Absence and other critical Employment Policies explained
- Record vehicle registration
- Explain site security, procedures for entering and leaving premises, and recording work attendance
- Issue security pass, credit card, business card

Day One: Organisation Guidance

- Explain Induction process, timing and provide an outline of their Induction Programme
- Explain health and safety procedures including first aid resources, reporting of accidents
- Explain the resources and people within the organisation
- Give an insight into the Social aspects of the organisation e.g. catering arrangements, local facilities, clubs, sports
• Provide an information pack, e.g. synopsis of the organization, its services and products; organisation chart, a glossary of terms
• Introduce and handover to Line Manager or Induction Buddy

Day One onwards: Job Induction

• Ensure new employee works through their planned Job Induction Programme that is monitored by their manager covering the following elements:
  o Organisation awareness: site tour, familiarization of products, services, and our customers
  o Introduction to colleagues, i.e. colleagues, peers, senior manager/s, department health and safety representative
  o Organisation and Department systems and procedures: how do I need to operate in terms of standards, systems, legislation; use of equipment and resources, use of company computers, telephones and other technology; routine administration and resources
  o Job performance and measurement: what is expected of me, how do I fit in, and how will I be measured
  o Other departments/functions: what they do, who they are and how they operate
  o Internal customers/colleagues: how we can help and support each other
  o External networks and resources: who are they and how can we access them
• Conduct interim reviews with employee against completion of their Job Induction Programme
• Check successful progress of the employee’s probationary period and address any gaps

Month One to Month Three: Company Induction/Orientation

• Ensure new employee receives training to help orientate them to their new organisation, the people and how it operates e.g.
  o Organisation’s potted history
  o Organisation’s structure, mission, vision, and values
  o Organisation’s business plan, annual goals and key performance targets as well as key challenges
  o Organisation’s products and services
  o Health and safety and any legislative training

Month Three to Six: Evaluation of Induction

Ensure you evaluate the employee’s induction which can be achieved in a number of ways e.g.

• Sign off the employee’s successful completion of their probationary period
• Ensure job objectives are set for the rest of the year ahead
• Test critical knowledge e.g. health and safety, industry specific
• Acquire employee feedback on what worked well, what could be done differently

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