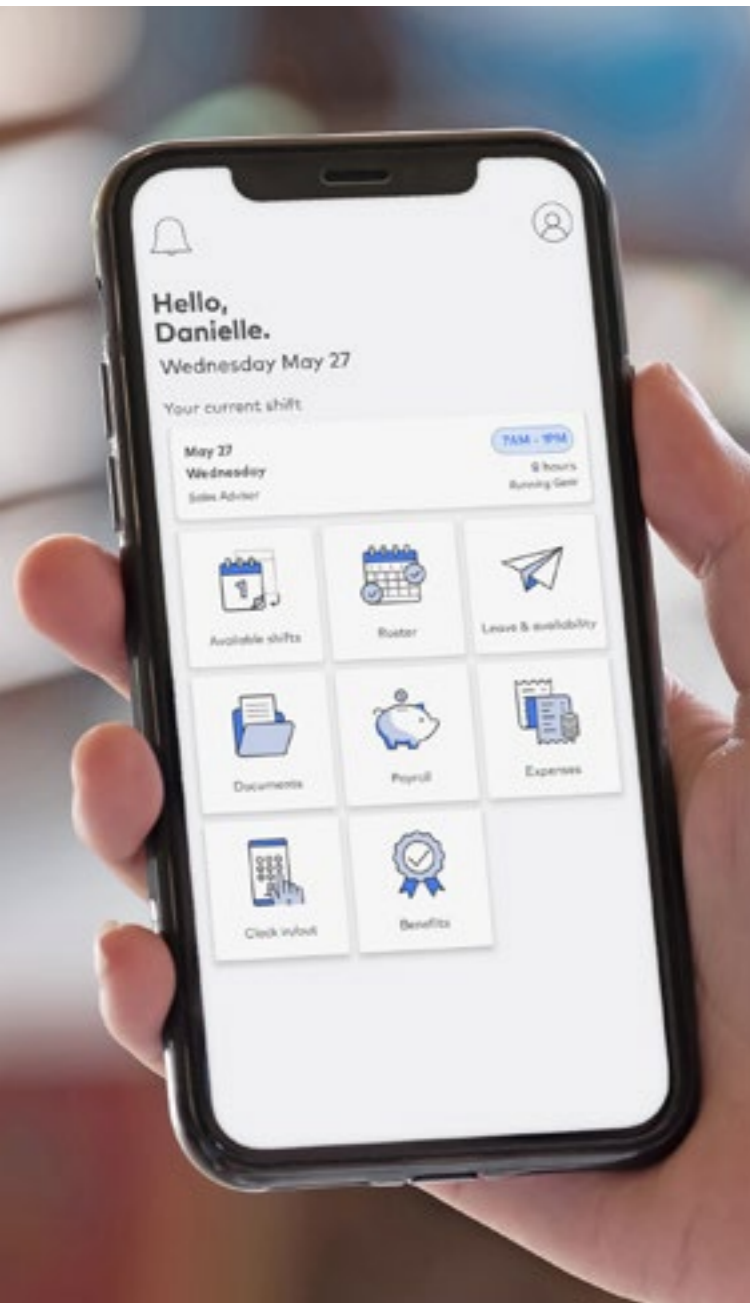# The only employee onboarding checklist you will ever need

roubler.

An engaging onboarding experience goes beyond day one

Onboarding, induction, orientation – whatever you choose to call it, there's no escaping the fact that how you welcome new staff to your team plays a huge part in their engagement and performance over time.

Many businesses lay a solid foundation for new customers, introducing them to products or services and demonstrating how valuable they are going to be. So why don't more businesses give new employees the same quality experience?

You don't get a second chance when it comes to making a good first impression with new staff. Most employees believe the onboarding process sets the tone for their ongoing experience and the culture within a business – and yet the statistics show that many of them will be on the hunt for a new job within six months of starting in your business.

When finding the right candidate is such a long and costly process, you don't want to lose the talent you've been lucky enough to find because of a poor onboarding experience.

Remember, you're not just hoping you've hired the right candidate – they're also hoping they've joined the right team. This is your chance to show them that the grass is already green.

Onboarding an employee goes far beyond just day one. When executed well, a good onboarding process benefits your entire team and helps create a culture of positivity and engagement.

This hands-on checklist will help you understand exactly what to do before, during, and after welcoming a new employee, and also provides some handy templates and tips for going the extra mile.

Two weeks before their first day

Often overlooked, an employee's pre-boarding should include general setup and admin tasks. Completing these before a team member starts means you will have more time to provide a warm welcome when they arrive.

☐ Ensure you have checked the applicant's right to work in Australia, in line with goverment regulations.

☐ Ensure their contract is signed and all relevant parties have a copy.

☐ Provide your new employee with a copy of the Fair Work Information Statement and if relevant, the Casual Employment Information Statement before starting work.

☐ Send them a welcome email to confirm their start day and time, store address, parking access, dress code, and details of what they can expect on their first day. Include a link to their online onboarding, so they can enter all the relevant details and upload any documentation and certifications before their first shift. **Click here to view our welcome email template.**

☐ Send them any eLearning they need to complete as part of their onboarding process, such as product training or certifications.

☐ Schedule them on for their first shifts – their details should flow in directly from the onboarding process, requiring no manual data entry into your rostering system.

☐ Set up their work email address and add it to the relevant email groups within the business.

☐ Set up their access to the relevant communication channels used by the team, such as your mobile app.

☐ Set up their employee access card or PIN for entering the store.

☐ Prepare a welcome pack for their first day (e.g. company branded collateral, name tag, company handbook and policies).

☐ If relevant, find out what size uniform they will need.

roubler.

Day one

- ☐ Give them their welcome pack.
- ☐ If relevant, provide them with their uniform.
- ☐ Ensure they have completed their online onboarding process, including entering their bank details, tax file number, emergency contact details, certifications etc.
- ☐ Provide them with access to any additional eLearning or document library resources they will need, such as product information, workplace health and safety videos, codes of conduct etc.
- ☐ Ensure they have their mobile app set up so they can access their schedule and clock in and out securely.
- ☐ Let them know of any key contacts at Head Office such as HR, payroll etc.
- ☐ Give them a run-down of company history, values, and relevant policies and procedures.
- ☐ Reiterate their tasks, responsibilities, personal and store KPIs, incentives and/or commission structures, as per their position description and contract.
- ☐ Let them know what to expect from the coming days and weeks.
- ☐ Conduct a tour of your location, including the lunch room, bathrooms and emergency exits.
- ☐ Introduce them to the team in-store and notify the wider team via the mobile app. **Click here to view our welcome announcement template.**
- ☐ Give them their first tasks to complete. We recommend providing them with simple, straightforward tasks, and being present and providing guidance for each of them.
- ☐ Schedule regular check ins. We recommend doing this weekly during their first month.

Week one

- ☐ Check in daily to see how they are going and answer any questions they might have.
- ☐ Provide them with any training relevant to their position so they are equipped with as much information as possible.
- ☐ Talk them through how to use the employee self service mobile app in more detail – including how to apply for leave, make expense claims and keep their payroll and personal information up to date.
- ☐ Remind them of their probation period, schedule their probation review, and explain what can be expected from the process.
- ☐ Conduct emergency, workplace safety and first aid orientations.

Weeks two to four

- ☐ Gradually give them more challenging tasks and provide them with the freedom to conduct these tasks on their own, but remain present for guidance and assistance.
- ☐ Check in weekly to see how they are going, answer any questions they might have, and provide any feedback. **Click here to view our suggested check-in questions.**
- ☐ Find out more about how they're going from their team mates and other managers.

Week five and beyond

- ☐ Give them even more challenging tasks and provide them with the freedom and ownership to further build confidence and autonomy, but remain present for guidance and assistance.
- ☐ Check in fortnightly to see how they are going, answer any questions they might have, and provide any feedback. **Click here to view our suggested check-in questions.**
- ☐ Conduct a follow-up survey to find out what they thought of their onboarding experience. **Click here to view our onboarding follow-up questionnaire.**
- ☐ Ensure their probation review is conducted on time. Use this opportunity to provide a more formal review of their work, discuss any training or up-skilling that may be required, and set expectations for the coming months.
- ☐ Continue informal one-on-ones, and schedule formal performance reviews every 6-12 months.

Did you know?

- • **78%** of businesses investing in onboarding reported increases in revenue.
- • A strong onboarding process can improve employee retention by **82%**.
- • Up to **33%** of employees hunt for a new job within their first six months.
- • The cost of losing an employee can be up to **twice** their annual salary.
- • More than **50%** of employees say they would be more likely to go above and beyond if they had a good onboarding experience.

roubler.

Inspiration for going the extra mile

☐ **Provide a small gift from the team.**
Show them you are excited to have them on the team and give them a memento of their first day.

☐ **Take them out for breakfast or lunch with the team.**
This shows that your team culture is a top priority and everyone can make time to meet and get to know a new team member.

☐ **Give them a shout out on the company's social media pages.**
This act of kindness is not only for your new team member, but also for your business. Existing and potential customers often keep an eye on your company's social media activity, so showing them you care for your team helps humanise your brand and present a positive image to others.

☐ **Assign them a peer buddy.**
Having a peer buddy is a great way to help them get to know their colleagues more quickly and pick up tips and tricks from a peer. We recommend assigning a buddy who has been with the company for at least one year, so they can learn about other aspects of the business.

☐ **Coordinate a 1:1 coffee catch up with the regional manager.**
When the boss makes time for a new recruit, it shows they truly want to get to know their new employee and learn about their goals within the business. Regional managers can also use this time to establish expectations, provide insights into the company vision, and get a fresh perspective from a newcomer.

☐ **Encourage cross-pollination of expertise.**
Cross-pollination helps break down barriers and encourages teams work together more collaboratively from the beginning, but also better understand what goes into each others' daily work and opens up smoother lines of communication.

☐ **Identify issues or roadblocks and solve them early.**
As soon as you identify a new employee's work-related issue or roadblock, actively take steps to solve them. This will eliminate the issue from building up or becoming worse, making them less overwhelmed and more productive.

☐ **Ask often and in-person: "What do you still need/What do you need more of?"**
As new employees start getting into a regular work pace, it's often easy for even them to forget about asking for help. By directly asking what they need, you're helping them be more comfortable and work more efficiently.

"The majority of our time and money spent on people is invested in attracting, assessing, and cultivating new hires."

Laszlo Bock,
former Senior VP of
People Operations,
Google

"Building the muscle to hire great people is a huge competitive advantage."

Patty McCord,
former Chief Talent Officer,
Netflix

roubler.

Resources

Welcome email

Send this to your new employee's personal email address a few days before their first day, clarifying the essential information they need to prepare and arrive on time.

Hi [first name]

We're all very excited to have you on board at [your company name]. Here are a few details to help you prepare for your first day.

Start day and time: [day, date] at [time am/pm]

Store address: [including floor and store number if relevant]

Entrance access: [detail how they can get in, or if you will be meeting them at the entrance]

Parking access: [detail where they can park]

Dress code: [smart casual/uniform]

[Include anything extra that might be helpful or welcoming e.g. "Don't worry about bringing lunch on your first day because some of us will be taking you to a restaurant nearby."]

Before your first day please also complete your online onboarding process: [insert link here]

If you have any questions or concerns please don't hesitate to email or call me.

Looking forward to having you as part of the team and introducing you to everyone. See you soon!

Warm regards
[first name, last name]

Welcome announcement

This message announces the arrival of a new colleague, which role they will be in, and when they start. Send this store- or region-wide via your mobile app on their first day, so you can include them in the welcome.

Hi team

Please help me give a warm welcome to our newest team member, [full name]!

[he/she/they] will be joining us as a [position title] at [location], starting from [start date].

Thanks
[first name, last name]

Check-in questions

Use this checklist as a prompt when checking in with new employees. This will help you understand if they are struggling with specific tasks, facing roadblocks, or coping with the pace and load of work.

- ☐ How are you feeling about your role?
- ☐ Have you felt welcomed by your team mates in-store?
- ☐ Have you felt welcomed across the business as a whole?
- ☐ How would you rate our team culture?
- ☐ What are you enjoying most about the role?
- ☐ Are any of your tasks or responsibilities making your feel stressed or overwhelmed?
- ☐ Do you have all the resources and information you need?
- ☐ Is there anything or anyone preventing you from performing at your best?
- ☐ Is there any additional training that you feel could help you perform better?
- ☐ Are you still happy with the goals we established earlier on?
- ☐ Do you think you are on track to achieve those goals?
- ☐ Is there anything we can do to support you better?
- ☐ Do you have any feedback for me, as your manager?

Onboarding follow-up questionnaire

Use this questionnaire to find out what your new employee thought of their onboarding experience, within two to three months of their starting. This helps you understand where you did well, or what could be improved, to create an even better experience for future hires.

I found the onboarding process informative and useful.
☐ Agree ☐ Neutral ☐ Disagree

The team was friendly and welcoming.
☐ Agree ☐ Neutral ☐ Disagree

I received detailed information about my role, tasks and responsibilities.
☐ Agree ☐ Neutral ☐ Disagree

I received useful information or training on the software or systems relevant to my role.
☐ Agree ☐ Neutral ☐ Disagree

I have a thorough understanding of the business, its products and services.
☐ Agree ☐ Neutral ☐ Disagree

The onboarding experience was in line with the team culture or values.
☐ Agree ☐ Neutral ☐ Disagree

I would recommend working at this company to others.
☐ Agree ☐ Neutral ☐ Disagree

My favourite part of the onboarding process was:

_____

_____

Some improvements I would suggest for the onboarding process are:

_____

_____

Seamless workforce management

Roubler is Australia's leading cloud-based workforce management software.

We make managing your workforce simple with smart, seamless software.

We'll help you onboard, roster, manage and pay your staff from one cloud-based system, all while helping ensure compliance.

With our all-in-one software you can manage your entire workforce, creating efficiencies and enabling you to focus on achieving your broader business goals.

Roubler is designed especially for shift-based workforces, bringing all your data together in one system.

Say goodbye to messy integrations and multiple platforms, and say hello to Roubler.

Sound good? We'd love to hear from you.

**Call us on +61 1300 833 137
or email info@roubler.com**

Recruit

Find and attract the very best talent to join your team.

Onboard

Automate employee onboarding and go paperless.

Roster

Create efficient rosters with a single click.

Manage

Manage employees seamlessly at every stage.

Pay

Enjoy peace of mind with built-in legislative compliance.

roubler.

Find out more

Want to learn more about automating your onboarding process?

Call us on +61 1300 833 137
or email info@roubler.com

roubler.
www.roubler.com/au