**EMPLOYEE ONBOARDING CHECKLIST**

**Prior to Start Date**

**Employee Documentation & Information**

* Employee signs employment contract with salary
* Employee:
  + Confirm start date, time & dress code.
  + Have employee arrive early enough to go through first day procedures.
  + Identify computer needs, phone requirements and need for Microsoft Office from Client…A.R.M. to identify.
  + Confirm name of the Client Contact as well as contact info…phone # and email address.
  + Have I.T. provide employee with GBP email.
* VP Sales to introduce the A.R.M. as the account contact.

**Socialization**

* ARM to call client at least one day in advance of start date. Discuss start date, employee’s role, and any special needs or requirements.

**Work Environment**

* Put together welcome packet to include: Writing Pad, Pens/Pencils, Coffee Mug
* Clean the work area and set up cube/office space with any necessary supplies.
* Create employee office or work area keys.
* If required, I.T. to install RingCentral or VOIP phone and have computer set up.

**Training/Development**

* Arrange pertinent trainings required for the job.

**FIRST DAY**

**Schedule, Job Duties, and Expectations**

* Clarify the first week’s schedule and confirm required and recommended training.
* Provide an overview of the functional work area.
* Review job description, outline of duties, and expectations.
* Review hours of work. Explain policies and procedures, vacation and sick time policies, holidays, etc.

**Socialization**

* ARM to greet the employee on the first day.
* Introduce employee to department heads...Accounting, I.T., Marketing
* At the precise time that employee is to start working, the A.R.M. is to call the client and introduce themselves and their new Employee.
* Upon talking to the client, the ARM is to check that everything is in place for them to start working. Making sure that training is set up and work schedule is established.
* ARM is to have the employee contact the client (phone, email or online meeting platform) to ensure they are communicating with one another.

**Work Environment**

* Give employee key(s) and building access card.
* Remind employee to complete tasks and duties for their client in a very timely manner.
* Discuss transportation and/or parking procedures for office building.
* Provide department or building-specific safety and emergency information.
* Take employee on a campus tour.
* Explain how to get additional supplies.

**Technology Access and Related**

* Provide information on setting up voicemail and computer.

**EMPLOYEE OFFBOARDING CHECKLIST**

**LAST DAY**

**Communicate Change Quickly – (No Notice Given or Dismissal)**

* HR informs employee of dismissal
  + Collect their Key Card
  + Has them gather their personal items
  + Has them escorted out of the building
* V.P. Sales informs A.R.M. that employee has been dismissed
  + VP Sales informs Client of dismissal
* HR informs Accounting and IT departments

**Accounting Department**

* + Note date of departure for precise payroll

**IT Department**

* + Delete employee account from relevant systems (ZOHO, Microsoft, Email, RingCentral etc)
  + Forward Emails/Calls to VP Sales

**Initiate the Knowledge Transfer – Notice Given**

* Have employee log important job details for their replacement
* Have replacement shadow for their final days or weeks.
* Note any files or documents that need to be transferred to replacement
* Note any software logins or passwords that need to be changed over
* Outline final work requirements and due dates

**Conduct Exit Interview – Notice Given**

* Ask for honest feedback about position, employer and teammates
* Share anonymous results with leadership and analyze for credibility
* Follow through and act on common complaints

**Recover Company Assets**

* Collect issued devices (computers, phones, headsets etc.)
* Collect any uniforms, keys, badges or security cards

**Tie up Loose Ends**

* Delete employee account from relevant systems (ZOHO, Microsoft, Email, RingCentral etc)
* Remove employee from any group emails or organizational committees
* Redirect employee’s incoming calls or emails to VP Sales
  + ONLY in the case where there is not a replacement
* Clean desk area and ready for next employee