

**Example only. Your checklist should be tailored to reflect the unique needs of your organisation and the joining employee. If you would like some guidance on this please contact us.**

## **INDUCTION CHECK LIST**

**Name** \_\_\_\_\_ **Start Date** \_\_\_\_\_

**\* *PRIOR TO JOINING***

- Send interesting and informative background information, e.g. History of the Company, latest in-house newsheet, copy of organisation charts, building layouts etc.
- Advise on how and where they should report on first day, which car park, entrance to use, whether to go straight to place of work or be collected etc.
- Issue internal notice advising employees of new employee joining, include a little background information, family details and when joining etc.
- Prepare name badges, office sign, include on internal telephone lists etc.
- Arrange for computer access/sign-ons, instruction manuals etc.
- Prepare an individual welcome note from the Managing Director.

**\* *FIRST DAY***

- Met by immediate Supervisor first thing in the morning, relaxed introduction, scene setting, set expectations, outline induction process for next few days weeks etc.
- Answer any immediate questions, seek documentation e.g. P45 etc.
- Confirm how and when they will be paid
- Do initial introductions – try to do key people first, then others, acknowledge they will not remember everyone, not to worry it will be followed up again.
- Take on a physical tour e.g. area of work, toilets, refreshments, other key facilities - again acknowledge they will forget where things are (issue map if you have one) not to worry – just ask!
- Run through the emergency procedures, exit routes, assembly points, treatment facilities etc.
- Explain the telephone system, run through key facilities, where to go for stationery, photocopying etc.
- Run through computer access facilities, key applications etc. but advise more detailed session will be held later if needed.
- Begin to cover key work projects etc. but remember this is the first day so retention may be limited!
- Arrange something/someone for lunch, and indicate what the general format for this is!
- Immediate Supervisor to spend last 15 minutes or so of the day just chatting through the first day, and give an opportunity to ask any questions, recap on key points, outline again what is expected over next few days and weeks.

**• *DURING FIRST WEEK***

- More detailed introduction to their work team. Outline organisational structure, reporting relationships (formal and informal), role of key people as appropriate to the position.
- More detailed introduction to their specific work projects, be clear about expectations and the kind of culture you want to create

- More detailed training on computer facilities, specialised equipment as related to their role
- Follow-up training on the telephone system and general office procedures
- Provide reading information on general policies and procedures
- Specifically mention those policies and procedures which are particularly important to the organisation
- Begin process of spending time with each of the key people
- Check they understand their contract details and have read the Employee Handbook go over any key points
- Provide information on the communication processes, briefings, newsletters, notice boards, unions etc.
- Outline any social and welfare benefits and activities
- Direct Supervisor to spend time at the end of the week – again provide an opportunity for questions, clarification, give reassurance etc.

• ***SECOND WEEK***

- Continue process of time with key people as appropriate
- Recap on the emergency and first aid procedures
- Begin to identify any obvious training needs, e.g. emergency, computer applications, specialised equipment, etc. and agree plan to address these
- Recap on the immediate physical tour and extend to other areas
- Continue personal introductions and extend to external contacts as appropriate
- Set time aside over the next few weeks to cover key policies and procedures

\* ***END OF FIRST MONTH***

- review process of induction so far, what useful, what not, gaps, what else needed
- seek out any areas of concern and address
- check out everything OK with their salary payments – any queries on payslip information, pension contributions etc.
- check out knowledge of key policies and procedures
- recap on emergency procedures,
- give feedback on how they have settled in, wherever possible be positive – however, if any areas of concern have developed then address them – don't let inappropriate/unwelcome behaviour, attitudes, systems etc. go on unaddressed. It generally doesn't take much to put people on the right track – and they usually welcome this!

\* ***AROUND 10 WEEKS***

- individually and jointly review progress
- identify any further training/information needs and agree plan to address
- have the sessions with key people been completed, useful, need more?
- check out understanding of key policies and procedures any more clarification required?
- Any queries on their terms and conditions, check out understanding of key aspects e.g. salary systems, performance management, absence etc.
- provide feedback on progress to date
- it is useful to keep notes of the various reviews, particularly any training needs, areas of concern etc. for possible future reference.