

5-Step Checklist for Successful Onboarding

Preparations in advance of new starters can help them hit the ground running. This is especially important for those stepping into leadership roles, as their performance impacts the entire team.

Use this 5-step checklist to equip new leaders to be productive from day one.



1. Sort Out Forms in Advance

Paperwork, you can't escape it, but no one wants to spend the entire first day form filling. Compile and send HR forms, access passes, NDAs and other documents to the new starter in advance. At home, they have access to supporting documentation, NI numbers and other required information.



2. Prepare An e-training Induction Programme

A consistent introduction to your company is guaranteed if you compile an online induction training programme. Cover the core values of the business, useful insights and an introduction to key members of the team. Links to additional sources of information can help new leaders navigate internal systems, understand operations or visit the websites of priority customers.



3. Pre-book Meetings with Team Members

A schedule for week one will help a new manager to hit the ground running. Include meetings with team members to ensure introductions are made. In these meetings, the leader can learn about different roles, expertise and working practices. This can help them understand current priorities and appropriate ways to engage and motivate team members.



4. Assign a Buddy & Mentor

Assign a positive member of the team to be the first point of contact for the first week. They can show the new leader the ropes. Then move to a mentor, who can support them to identify and achieve personal and company goals. A mentor will work with the individual's strengths to develop capabilities and resilience.



5. Build Contacts

A new member needs to establish good contacts. Allocate time for them to update their LinkedIn profile, connect with colleagues online and search for groups that are relevant to your industry. Arrange meetings with clients, suppliers and other stakeholders and get them out networking!

If you have any questions about successful onboarding, please [get in touch](#).

