

QuickBooks' checklist for onboarding a new hire

Before the employee's first day

- Set up their employee login, email address, and any other technical requirements.
- Provide their uniform or required attire, if necessary.
- Collect their emergency contact information.
- Collect their banking information for direct deposits.
- Announce the new hire to the rest of your staff. Include the new employee's name, position, responsibilities, and start date.
- Choose a member of your team to serve as your new hire's mentor or buddy.
- Send a welcome email to the employee with details for their first day. Details might include where to park, what to bring, and a tentative schedule.

On the employee's first day

- Present a warm welcome with lunch, happy hour, or another team activity.
- Conduct a tour of your facility or workplace.
- Host a new hire orientation to explain your business's mission, vision, and goals.
- Share information about your products, services, and customers.
- Review the employee handbook, if applicable.
- Introduce the employee to your other team members.
- Review the employee's responsibilities, expectations, and schedule.
- Share their logins and provide information about how to use the phones, time clock, and other equipment or software they'll need.

- ❑ Set up a job shadow with an existing team member.
- ❑ Offer training on your most urgent and important company policies and procedures.

During the employee's first week

- ❑ Provide on-the-job training for all responsibilities of their new role.
- ❑ Complete their benefits enrollment paperwork.
- ❑ Continue training about company policies and procedures.

Within the employee's first 90 days

- ❑ Schedule several one-on-one conversations to discuss progress, goals, challenges, and feedback.

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