

Training Checklist

Now that you have a new member joining your team, it is important to guide them through the onboarding and training process. Below is a checklist and timeline we recommend to make sure you are covering everything with the new employee.

Prior to the First Day

Sharing useful resources with the new hire in advance can save you time on training and help new hires come to their new role prepared.

- Send an agenda for the first day, so they know what to expect (1:1 meeting(s), demos, trainings, etc.)
- Send manuals and instructions on how to set up accounts (company email, social media, etc.)
- Send a digital or print copy of your employee handbook, so new hires can take a look and prepare any questions they may have

First Day & Week Training

The start day for the new employee has arrived, which leads to many exciting pieces for the company. Remember onboarding and training is a key in long term retention for your new hire so put your best foot forward on preparing the new hire with everything they need to be successful.

Company Overview Training

- Present your company history and mission statement.
- Display your company timeline with key achievements.
- Provide a copy of your organizational chart and indicate where the new hire sits within the chart.
- Offer detailed explanations of department structures and roles.
- Provide any product demos the new employee might need.
- Set aside time for the new hire to ask questions.

Company Policies Training

- Describe your workplace rules (e.g. hours, breaks, use of lockers and key fob.)
- Describe the types of leave the new hire is eligible for (sick, vacation, etc.) and when the new hire can begin going on leave.
- Explain your requirements for remote work, if relevant.
- Explain your performance review process.
- Ask new hires to review and sign any non-disclosure or confidentiality agreements.
- Provide a FAQ document on the most popular company policies.

Benefits Package Training

- Present all options for life and health insurance plans and make sure new hires acknowledge the terms.
- Explain stock options and provide documents that describe the terms in detail.
- Explain flexible hours options and requirements (e.g. how to request approval for remote work.)
- Describe how to use all available training and development benefits, like education budgets.
- Describe any mobile plan and/or company car reimbursement benefits you offer.
- Present the details of your wellness programs or health perks (e.g. discount gym membership.)

Role-specific Training

- Describe the new hire's tasks (e.g. a typical day at work.)
- Present job-specific tools that the new hire will use.

- Provide a list of helpful resources to find answers to frequently asked questions.
- Display and explain reports that track the team's KPIs.
- Present business objectives related to the new hire's position and team.
- Explain the roles of different members on the team and how the new hire will work with them.
- Schedule regular one-on-ones with the new hire.
- Schedule introductory one-on-ones between the new hire and team members.

IT Setup and Training

- Make sure new hires have access to necessary tools and manuals to use hardware and software.
- Check whether new hires have set up company accounts (e.g. email) and provide assistance as needed.
- Ensure all new hires understand and sign data privacy agreements.
- Help new hires configure WLAN connection settings (computer and mobile.)
- Help employees install anti-virus software.
- Set new hires up with password security accounts if needed (e.g. VPN, LastPass, etc.)
- Describe visitor's policy.
- Train new hires on how to secure their workstations.

Security & Safety Training

- Present security training videos and test employees' knowledge of security protocols (e.g. quizzes, role-playing.)
- Enable features that let employees remotely access corporate software.
- Go over out-of-office best practices (e.g. how to securely connect to local networks and how to join video calls.)
- Review workstation security measures.
- Invite employees to join a security forum on your company intranet so they can ask questions (e.g. Slack #security channel, BambooHR.)
- Organize an emergency evacuation drill.
- Schedule a First Aid presentation.
- Provide guidelines on proper use of hazardous material and equipment.
- Run a fire drill and describe precautionary actions to avoid fire risks.
- Explain all measures the company enforces to protect employees' well-being (e.g. non-smoking policies.)

