

# 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.)

