New hire training checklist | Workable

Before your new hire’s first day

Send some useful resources in advance to save you time on training and help new hires come to their new job prepared. Here are some things to get done before your new hires start:

* Send an agenda for the first day, so they know what to expect (include any 1:1s, demos or trainings relevant to your new hire’s role.)
* Send manuals and instructions on how to set up corporate accounts (e.g. company email.)
* Send a digital or print copy of your employee handbook, so new hires can take a look and prepare any questions they may have.

On your new employee’s first day

**Company overview training**

Use this overview to explain how your departments are structured. You can present this overview to groups, if there are multiple new employees starting on the same day. To facilitate discussion, make sure each group is small (no more than three or four employees.)

Here’s what to include in a 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.

Share relevant files, either in digital or print format at the end of each presentation, so that new employees can read them later, if they want to.

**Company policies training**

During your company policies presentation, highlight the most important things new employees need to know and address their questions.

Here’s what to include in a training on company policies:

* 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**

Insurance and stock option plans can be difficult to understand. During this training, explain your benefits in simple terms. Clarify any actions employees need to take to use their benefits packages. Answer questions they have. If necessary, get signed copies of contracts.

Here’s how to conduct a training on employee benefits:

* 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**

In this training, hiring managers explain team structure and roles, establish expectations for success and set new hires up with useful tools and resources.

Here’s what hiring managers should include in role-specific trainings:

* 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**

IT staff should help new employees set up their computer stations and ensure all systems are up and running. They should also guide new hires on data privacy, system security and proper use of software and hardware.

Here’s what to include in an IT setup 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 (e.g. LastPass.)
* Describe visitors policy.
* Train new hires on how to secure their workstations.

A month after your new hire starts

**Security training**

During this training, a member of your IT or Security team should describe employees’ data privacy and system security obligations. For roles where employees handle confidential employee or customer data, prioritize security training earlier than one month. Otherwise, schedule this training to be completed during the new hire’s first month at work.

Here’s what to include in a security training for new hires:

* 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.)

Three months after your new hire starts

**Safety training**

Your office manager or an HR team member should design workplace safety training sessions and ensure all employees attend within their first three months. It’s best to conduct these trainings in groups. When necessary, collaborate with professionals on relevant topics (e.g. inviting First Aid Trainers as instructors.)

Here’s how to train new hires on safety practices:

* 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.)
* Provide office ergonomics tips, including:
  + Good desk posture
  + Proper chair height
  + Adjusting monitor brightness