**Induction Checklist**

***Note:*** *Feel free to adapt or develop this checklist to meet your needs*

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| --- | --- | --- | --- |
| **Name of Employee:** |  | | |
| **Job Title:** |  | | |
| **Start Date:** |  | **Induction Completed:** |  |

|  |  |  |
| --- | --- | --- |
| **First Day** | **Complete:** | **Notes:** |
| To be welcomed by |  |  |
| Show them to their desk / workstation |  |  |
| Introduce them to their line manager, colleagues, including their ‘buddy’ (handy to have one person to ask questions of when new) and senior managers |  |  |
| Give them a tour of the rest of business including facilities |  |  |
| Action H&S tour / talk |  |  |
| Action any HR and payroll paperwork such as P45, signing contracts, confidentiality agreements etc |  |  |
| Give details such as dress code, parking, smoking and the canteen |  |  |
| Explain the role fully, how it fits in the organisation and work practices  Outline expected performance and how it will be assessed  Discuss training booked / that needs booking  Outline possible opportunities for future development of the role |  |  |
| Documents such as organisation charts with names and job titles, a desk plan with names and phone lists can really help new joiners |  |  |
| **First Week** | **Complete:** | **Notes:** |
| Go through key points in the contract such as   * Benefits * Pay * Probationary period * Hours * Breaks * Pension information * Notice periods |  |  |
| Discuss the important rules on:   * Job performance * Discipline * Absence, including because of illness and sick pay * Complaints against staff, such as bullying and harassment * Also say where more details can be found |  |  |
| Explain other important rules such as use of the company internet, email and phones |  |  |
| Explain Company history / Who’s who, how it works and what it produces / And any Future plans |  |  |
| **First Month:** | **Complete:** | **Notes:** |
| The company’s commitment to being an equal opportunities employer |  |  |
| Rules around Data protection |  |  |
| Details of any employee representation, including any trade union membership |  |  |
| Organise a one-month informal meeting with the line manager to assess how they are adjusting to their role, and whether they have any coaching or training needs, or other concerns |  |  |
| **At Three Months:** | **Complete:** | **Notes:** |
| Review with the line manager how they are settling in and performing  This is also an opportunity to pinpoint any development needs, set timescales for achieving them and adjust work targets if required |  |  |
| **At Six Months:** | **Complete:** | **Notes:** |
| If the new employee is on probation, then it’s decision time – will they stay or go?  If they’re staying, it’s time for the line manager to look to the next six months, any new work objectives, and any experience, coaching or training needs |  |  |
| It is also a useful time to get feedback on how well the induction process is working while memories are fresh |  |  |