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| **Preparation to be completed before your new employee starts** |
| **Activity** | **Assigned to** | **Completed** | **Comments** |
| Prepare all new starter documents e.g. * Health and safety forms
* PAYE/HMRC
* Bank details
* Payroll forms
* Contract of employment
* Keys
* Driving Licence (if required)
* References
* Staff handbook
* Internet and email access
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| Prepare a workspace for the new employee with all equipment |  |  |  |
| Prepare a list of simple tasks to complete on the first day and an additional set of tasks to be completed in the first week – *be sure to set meaningful tasks that will kickstart the employees development*  |  |  |  |
| Ask colleagues to suggest meetings that the new employee can attend and include these in the induction plan  |  |  |  |
| Select a mentor – *a mentor will offer informal support and ensure the employee is following company procedures. Get the mentor to send the employee a friendly email ahead of their start date to make them feel welcome* |  |  |  |

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| **First meeting with your new employee**  |
| **Activity** | **Assigned to** | **Completed**  | **Comments** |
| Refer back to the job description and detail the company’s visions – *emphasising company visions will make the employee think of the bigger picture*  |  |  |  |
| Detail expectations providing clear examples of acceptable and unacceptable behaviours and outcomes  |  |  |  |
| Complete and sign all new starter admin (use prepared documents as above) – *get important (and boring) paperwork finished and out of the way* |  |  |  |
| Talk about the employee’s thoughts and ambitions and introduce them to the people who can help them achieve – *you want the employee to learn from successful colleagues*  |  |  |  |
| Share the targets for the day and the targets for the week |  |  |  |

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| **First Day** |
| **Activity**  | **Assigned to** | **Completed**  | **Comments** |
| Welcome meeting with line manager or company director / owner – see first meeting with your new employee (above) |  |  |  |
| Set some targets for the employee to achieve that day – *use the tasks you’ve already prepared* |  |  |  |
| Meet the team – organise a meeting with everyone your new employee will work with. Try to make it relaxed and ask each person in the meeting to provide a brief explanation of their role and to share something non work related. Swapping personal interests will help build your new employees confidence to ask people for help. |  |  |  |
| Organise a tour off the office make sure you highlight important health and safety items like fire escapes  |  |  |  |
| Introduce your new employee to the software and systems used by your company. Be sure to introduce them to the person that can support their use of these tools. Ensure your new employee can access each of the systems |  |  |  |
| Meet at the end of the day to review the tasks completed |  |  |  |

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| **First Week** |
| **Activity** | **Assigned to** | **Completed**  | **Comments** |
| Involve your new employee in ‘real work’ to offer an early opportunity for success – *they could prove their worth very quickly!* |  |  |  |
| Ensure their mentor is reviewing and supporting their work – *use mentor’s feedback to improve employees life with the company* |  |  |  |
| Get your new employee involved in group projects and as many meetings as possible – even if these meetings are specifically related to their role |  |  |  |
| Set targets for the employee to build relationships with key contacts surrounding the role i.e. customers, managers, support staff |  |  |  |
| End of week review: did they hit targets? What have they learned? What did they enjoy? What did they dislike?  |  |  |  |
| Set goals for the month  |  |  |  |

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| **First month** |
| **Activity** | **Assigned to** | **Completed**  | **Comments** |
| Give your new employee additional tasks to their main duties at least once a week – *watch how they cope with managing several tasks at once and prioritising*  |  |  |  |
| Ask your new employee to sit in on some internal or customer meeting to get a feel for how the company operates and understand typical client requirements – *their work will very quickly reflect your customers requirements* |  |  |  |
| What does the employee like and dislike? Agree how to overcome what is disliked  |  |  |  |
| Speak to new employee’s mentor to get their feedback – *Use feedback to develop the employee* |  |  |  |
| Take employee to lunch to create an informal environment and get honest feedback and goals – *the employee will appreciate the gesture and open up* |  |  |  |
| Ensure new starter training has been completed  |  |  |  |
| Set goals for next three months and book weekly one-to-one reviews  |  |  |  |

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| **First 3 months** |
| **Activity** | **Assigned to** | **Completed**  | **Comments** |
| Go through your new employees work from the past 12-weeks, compared to the job description and their goals – did they achieve? Are they on track? – *if not, why?* |  |  |  |
| Praise their achievements and discuss their mistakes – *make them feel good but make sure the understand and acknowledge their mistakes.* |  |  |  |
| Have the things the employee disliked from month one been overcome? – *if not, you need to work harder to make them better!*  |  |  |  |
| Ask the candidate for 3 things they like about their new job and 3 things they dislike. Plan together on how the 3 disliked things can be changed |  |  |  |
| Attendance review – *promote attendance/commitment to company*  |  |  |  |
| Agree on training required and book any courses |  |  |  |
| Sign off review and book 6-month review  |  |  |  |