

Ch 10: Sample Onboarding Procedure and Checklist

On the first day, virtually or physically, welcome the new employee and provide a warm introduction to the firm's culture. Provide a tour of the office, including key locations (restrooms, kitchen, conference rooms). Review basic office protocols, such as security procedures and emergency exits.

- Present the firm's mission, vision, and values.
- Distribute the employee's access card and explain security measures.
- Review the employee's job description and responsibilities.
- Conduct an orientation meeting to introduce key team members and supervisors.
- Provide an overview of the firm's organization and structure.
- Discuss the firm's policies, including hours of work, attendance, and dress code.
- Explain the firm's technology and software systems, and provide necessary training.
- Schedule training sessions or mentorship opportunities, if applicable.
- Outline the firm's benefits package, including health care, retirement plans, and accrual of paid time off or vacation.
- Ensure the employee completes all required paperwork and reviews and signs relevant legal documents.
- Provide guidance on timekeeping and expense reporting procedures.
- Discuss the firm's expectations regarding confidentiality and data security.
- Explain the firm's performance review process and expectations. Offer an opportunity for questions and open dialogue.

Checklist

Employee name: [new employee's name]

Position: [employee's position]

Start date: [start date]

Before the employee's first day:

- Send a formal offer letter and employment contract.
- Provide the employee with a copy of the employee handbook.
- Complete necessary background checks and reference checks.
- Ensure all legal and compliance documents are prepared and ready for the employee's signature (e.g., W-4, I-9, confidentiality agreements).
- Set up a company e-mail address and provide login credentials.
- Order any required office equipment, supplies, and access cards.
- Prepare the employee's workspace, including necessary furniture and technology.

Within the first week:

- Set up meetings to discuss job-specific training and expectations.
- Provide access to necessary software, databases, and resources.
- Assign a mentor or buddy for guidance and support.
- Review the firm's case management procedures, if applicable.
- Introduce the employee to ongoing projects and client matters, as appropriate.

- Encourage the employee to participate in team meetings and activities.

Ongoing onboarding (first 30 days and beyond):

- Schedule regular check-ins with the employee to assess progress and address questions.
- Encourage the employee to attend relevant industry events or training sessions.
- Continue to provide opportunities for professional development.
- Ensure the employee is enrolled in any necessary training or certification programs.
- Review the firm's culture, values, and long-term goals periodically.
- Foster a positive work environment and open communication channels.