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| **ONBOARDING PREPARATION** | **PERSON RESPONSIBLE** | **COMPLETED** |
| **Final Employment Checks & Formalities**  ❒ Due Diligence & CRC  ❒ Firm Approval  ❒ Agreement Finalized & Signed  ❒ Confirm Start Date |  |  |
| **Welcome Package at Their Workspace**  ❒ Welcome Card & Gift  ❒ Provide the Firm and/or Employee Handbook  ❒ Provide Compliance/Regulatory Manual |  |  |
| **Start Date Welcome & Orientation**  ❒ Warm Welcome to the Office!  ❒ Quick Tour of the Office  ❒ Introductions to Everyone in the Office  ❒ Bring them to their Workspace |  |  |
| **Getting Everyone on the Same Page**  Send “Welcome to the Firm” Email to the Office  Send Meeting Invites for:  ❒ Standard Weekly Firm Meetings  ❒ Standard Quarterly Firm Meetings  ❒ Annual Business Planning Meeting |  |  |
| **Trigger Ongoing HR Follow Up**  ❒ Set Up HR Digital and/or Physical Files  ❒ Set Up Payroll Process  ❒ Set Up Probationary Follow Up & Review  ❒ Set Up Welcome Process on CRM |  |  |

**Human Resources Checklist**