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New employee onboarding checklist template word

New Employee Checklist

Employee Name: _____ Employee ID Number: _____
 Room Number: _____ Position Title: _____
 Phone Number: _____ Department: _____
 Email Address: _____ Supervisor: _____

Human Resources:

- AFS/ME
- Building Maps
- Campus Layout and Maps
- Call Service
- Customer Service Standards and Philosophy
- Department Purpose, Program, Mission
- Employee Handbook/Contract (Refer to University Web Site)
- Employee Recognition Programs
- Faculty
- Navigation of University and Dept. Web Site
- Day Chart
- Office of Student Affairs, People and Location
- I.S.A.
- Parking and Transportation
- Policies and Procedures
- Position Description and Expectations
- Student Development Outcomes
- Supervisor
- Tour of people, places, and services
- U-Cart
- University Academic Calendar/Holiday
- University New Employee Orientation
- Session - Date: _____

Payroll

- Absences
- Employee Benefits
- Holidays
- Payroll Calendar and Direct Deposit Option
- Sick, Child or other emergency
- University Overtime and Comp Time Policies
- University Production Threat
- Vacation and Sick Leave
- Written and verbal to call

Personal

- Address, Telephone, Name Changes
- Employee Assistance Program
- Online Directory - One stop for changes and/or privacy settings
- Other Business Cards
- School Change
- Security Protocol
- U-Cart

Training and Development

- Customer Service Training
- Performance/Attendance Review
- Probationary/Tenure Period Explained
- Regent's Scholarship
- Training Opportunities, Job Specific

Administration

- Calendar - UMCA, Meeting Mails, etc.
- Direct Deposit
- E-mail
- Emergency Contact Information
- I-9
- Office Communications
- W-4

Client Onboarding Checklist Template

BACKLOG	WELCOME	INITIATION	FOLLOW-UP
<ul style="list-style-type: none"> o Assign Sales Representative o Assign Customer Care Representative o Contract analysis and validation o Sales rep briefing regarding client logistics and predictions 	<ul style="list-style-type: none"> o Welcome email introduction o Schedule meeting o Catalog any client questions o Catalog any client reactions, red flags, issues, etc. o Catalog any positive feedback 	<ul style="list-style-type: none"> o Schedule client meeting / call to answer any additional questions o Inquire as to how the client needs were met prior to employing this service or product o Define client expectations o Implement further staff training, if applicable 	<ul style="list-style-type: none"> o Assess need for meetings o Answer any questions o Set short and long-term goals o Answer any questions
			<p>CLOSING</p> <ul style="list-style-type: none"> o Customer needs met o Review short and long-term goals o Answer any questions o Assess customer usage of services/tools o Note any increase or decrease in usage

New Hire Checklist

This checklist guides Req Administrators, HR Reps and Managers through the process of setting up a new hire at Emory University.

TASK	INSTRUCTIONS	RESPONSIBLE PARTY
Complete Offer Details Form for Uncompensated Hire	Req Administrator receives an email with a link to the Offer Details Form in you can access the form through your dashboard notification in the My Offer Details Form and Offer Progress panel. For assistance on completing the Offer Details Form, contact your department recruiter.	Req Administrator
Complete eHRAP for Uncompensated Hire	Complete eHRAP at www.hr.emory.edu/hrap eHRAP instructions can be found online at http://www.hr.emory.edu/hrap/ehrap/ehrapmanual.html	Manager/HR Rep
ONBOARDING STAFF		
Initiate Onboarding	Once the candidate clears all pre-employment screens, recruiter will launch onboarding. An email is then sent to the new hire to complete their online orientation tasks.	Recruiter
Complete Online Orientation	New Hire receives an email to log into iCIMS and complete the online orientation tasks. Items to complete will vary according to the type of hire and department. Online orientation includes: <ul style="list-style-type: none"> • Emory Profile Information • Emory Confidentiality Statement • Emory Privacy and Security • Financial Disclosures Form (W-9) • Direct Deposit • Title IX Training Confirmation • Safety Orientation • University Policies • Parking Information • Network ID (NETID) • Student Resources • Emory email • Search Equipment • Link to Internal Management Site 	New Hire
ONBOARDING FACILITY		
Launch Prestart Facility	Initiated when the: <ul style="list-style-type: none"> • Confidential Data Form Signature is Yes • Offer Details Form Signature is Yes • Contact HR is "contacted" 	Req Administrator
Onboard Facility	After launching Pre-Start, launch the Onboarding Wizard in iCIMS and send an email to the new hire to complete the online orientation tasks.	Req Administrator

PROPERTY ONBOARDING CHECKLIST

Upon Notice of Acquisition (30-45 Days Out)				
Operations & Property Management				
Done	Checklist Items	Responsibility	Date	Comments
	Organize take over team			
	Complete Due Diligence			
	Review contract summary			
	Discuss pending open legal matters			
	IM & VP to submit copy of Management Agreement to legal for review of Special Provisions			
	Receive Executed PMA Approved by Legal			
	Submit NFRS request			RVP Approval if PMA is not finalized. HR notice completed with NFRS.
	Complete New Property Questionnaire			
	Present proposed budget to owner for approval			
	• Budget approved by client			
	Present proposed required rental criteria to owner for approval			
	• Rental Criteria approved by client			
Systems & Technology				
Done	Checklist Items	Responsibility	Date	Comments
	Complete systems setup template or obtain required reports for software conversion			3 days from receiving info from setup team
	Complete New Property Systems Matrix			
	Verify Yardi property number			
	Setup email addresses			
	Verify setup of logins for screening, Yardi/OneSite, iKRONOS, URPro			
	Place order for required computers/electronic equipment			
Vendor Management				
Done	Checklist Items	Responsibility	Date	Comments
	Review vendor contracts w/ owner to assess which to keep and cancel			
	Contract cancellations/management change letter to be sent to vendors 30-45 days prior to sale			
	Contact Treasury Service Manager as soon as possible regarding any special banking requirements			
	Provide remaining vendors with Compliance Depot requirements			
	Provide cancellation notices to any utility companies to not be retained			
	Identify and arrange for all new utilities to be activated.			
	Submit new contract requests for ancillary services			
	Utility Billing			Synergy (30-60 days out)
	Credit Screening			
	Leasing Portals (websites)			
	Surety Bond Program (Sure Deposit)			
	Resident Portal			

90 DAY ONBOARDING FOR SALES PLAN TEMPLATE

CATEGORY	X	FIRST 30 DAYS	X	FIRST 60 DAYS	X	FIRST 90 DAYS
SALE PRACTICES / SYSTEMS		Review all company sales guides		Review and hone personal process		Request manager review and coaching
		Request peer shadowing		Catalog signs of opportunities		Review forecasting processes
		Search trade publications and blogs for further sales guides		Catalog experienced red flags		Discuss territory growth potential
		Request meetings with manager to set goals		Request manager review and coaching		Understand company negotiation policies
		Research assigned territory		Build relationships with affiliates / partners		Review and catalog red flags
		Create clear account plan		Research advanced sales processes		Review and catalog successes
		Research company FAQs				
		Hone introductory message				
		Review existing customer follow-ups examples				
PRODUCT / SERVICE KNOWLEDGE		Read all product information		Review customer experiences and scenarios		Advance to additional products / services
		Review any multimedia presentations		Perfect demo / pitch procedures		Research growth / advancement possibilities
		Research any product complaints		Stay abreast of all new features / offerings		
		Research product specific FAQs		Familiarize self with pricelist and discounts		
		Research existing pitch/call scripts		Adapt pitch to various customer groups		
		Create, hone, and practice pitch				
		Familiarize self with physical product or service, if possible and applicable				
TOOLS OF THE TRADE		Review company provided tips		Research advanced techniques / tips		Further hone skill set
		Research further methods online		Seek advice from manager and peers		Tailor tools / tricks to best fit personal style
						Catalog successful methods
BUSINESS / INDUSTRY STANDARDS		Research industry concepts and standards		Research sales meeting procedures		Continue industry research
		Review consumer/customer base		Build structure for leading meetings		Join industry groups
		Conduct brief competitive analysis		Continue customer research		
		Access all company info regarding industry		Continue competitive analysis		
OTHER						

Employee onboarding process free new hire checklist template word.

At best, maintaining employee retention can positively affect the firm. How To Craft an Onboarding Checklist In most cases, HR managers and assistants formulate the contents on the onboarding plan. Since they have authority over essential production instructions and processes, these employees make the training plan. The date for the employment contract signing is also written here. 4. Followup Schedule for Training, Orientations, and Seminars And lastly, you have to keep monitoring the effectiveness of the onboarding process. The workplace accommodates different versions of change—new management, workers leaving for greener pastures, and improvements in business operations. What are the manuals and powerpoint presentations needed by the leaders? At times, having a staffing plan can affect the onboarding procedures of the firm. Besides the personnel file containing the applicants' qualifications, businesses also consider other factors in the hiring process. Make sure that you place important reminders on the checklist to avoid forgetting key points. 3. Enumerate the Needed Onboarding Documents and Employee Requirements After that, write down the requirements of the onboarding plan. Hence, an onboarding process takes place to ensure the success of employee turnovers. The onboarding checklist contains orientation schedules, training plans, and onboarding paperwork needed to ensure the proper progression of new employees. While hiring new workers is necessary for companies, it also has some disadvantages. Do note that two coincide to make the transition of employees easier. Having checklists, particularly daily checklists, help workers organize their day-to-day plans and activities. To lessen delays, you have to start by creating a timeline for the proposed integration and training plan. After all, these people will have responsibilities in handling the future of the company. So, gather more information about onboarding checklists with this article. The recruitment team uses onboarding checklists to make sure the newcomers can smoothly transition into the production area. 42+ FREE CHECKLIST Templates - Download Now Adobe PDF, Microsoft Word (DOC), Microsoft Excel (XLS), Google Docs, Apple (MAC) Pages, Google Sheets (Spreadsheets), Apple (MAC) Numbers FREE 19+ Onboarding Checklist Samples 1. New Employee Onboarding Checklist Template Details File Format MS Word Pages Google Docs PDF Download 2. Employee Onboarding Checklist Template Details File Format MS Word Pages Google Docs PDF Download 3. Pre Employment Checklist Template Details File Format MS Word Pages Google Docs PDF Download 4. Developer Onboarding Checklist Template Details File Format Size: A4 & US Download 5. IT Onboarding Checklist Template Details File Format Size: A4 & US Download 6. HR Onboarding Checklist Template Details File Format Size: A4 & US Download 7. By making a timeline, you can assess the progress of the new workers. In addition, you can also adjust the timeframe if there are changes in the business proceedings. 2. List Down the Company Policies and Reminders Next, you must focus on introducing the company policy and employee handbook. Besides providing input in the progress of duties, task lists also remind the personnel about upcoming deadlines and forgotten assignments. Do the new hires submit specific documents while on training? During the first day in the office, the onboarding team should begin discussing some essential rules in the workplace. Additionally, the list of onboarding tools is on the checklist. The duration of the staff onboarding plan relies on the requirements and goals of the business. Furthermore, they also delegate tasks to specific leaders to teach or disseminate information. Through the onboarding process, the workers will know the best practices and procedures in the enterprise. Property Onboarding Checklist marketing.pinnaclefamily.com Details File Format Size: 240 KB Download 20. Some companies implement a 90-day onboarding plan, while others utilize two weeks only. Company Onboarding Checklist Details File Format Size: 28 KB Download 18. New Employee Onboarding Checklist Template Details File Format Size: 4 MB Download 19. Simple Onboarding Checklist Template Details File Format Size: 8 KB Download 16. Printable Onboarding Checklist for New Employees Details File Format Size: 20 KB Download 14. New Vendor Onboarding Checklist in PDF Details File Format Size: 411 KB Download 15. Onboarding Checklist Sample in Excel Details File Format Size: 8 KB Download 13. It can be pricey for the company, but it becomes compulsory when the enterprise loses many workers. With all these responsibilities, the managers have HR checklists to trace ongoing and finished assignments. According to Glassdoor, there are hidden costs of onboarding new personnel in the business. Onboarding Condensed Checklist Details File Format Size: 233 KB Download What Is an Onboarding Checklist? Before new hires begin to take part in the business process and operations, they need to have employee onboarding training schedules. Besides the introduction and welcome letters, the business guarantees the full transition of the new workers, even when it takes many months. When this happens, the firm utilizes recruitment plans to employ new employees. From here, the company practices resilience to weather the storm. In particular, organizations undergo employee shortages due to retirements and resignation notices. On the other hand, induction is a simple and shorter process of introducing newcomers into the office. Business owners and team leaders have to assess the personality traits and discover the work ethics of these individuals. However, it is unavoidable because of uncontrollable circumstances. Sample Restaurant Employee Onboarding Checklist Details File Format Size: A4, US Download 9. Free Onboarding Checklist Template Details File Format Download 10. Free HR New Employee Onboarding Checklist Details File Format MS Word Pages Google Docs PDF Download 11. The article states that the average cost of onboarding one person amounts to nearly \$4,000. And when names are chosen, they have an onboarding guide to ensure a successful turnover. Manager's Onboarding Checklist Details File Format Size: 160 KB Download 12. Usually, onboarding training occurs for some weeks or months, depending on the requirements and onboarding plan and growth plan of human resources. Aside from following the new employee plans, you should also keep a training calendar to track newcomers' improvement. Again, the timeline depends on the workload and onboarding document prepared by the recruitment team. Sample Onboarding Checklist Template Details File Format Size: A4, US Download 8. IT Services Onboarding Checklist Details File Format Size: 16 KB Download 17. For instance, HR managers use HR onboarding checklists to track the improvements of new employees. So, what are the steps in crafting the checklist? 1. With that, the recruitment team, armed with HR action plans, takes extra precautions when hiring new faces. Create a Timeline of Events Onboarding new hires require enough time and resources. If the onboarding plan is complete, you can evaluate the usefulness of the program. FAQ's The process of onboarding includes integrating new members into the company's culture and behavior.

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