

Onboarding checklist

*mandatory

One month - one week before start date

-  Offer letter - if you've recruited through a recruitment agency, it's now time to create that personal connection with your new employee, so send the offer letter direct to them. Request reference contact details. Offer letter should include terms of employment, such as job title, start date, salary (plus any contractual bonus and equity), probation period, benefits, hours, and what they need to do to accept the offer.
-  Contact references.
-  Employment contract* and employee handbook* - send this well in advance as there may be some negotiation/questions or back and forth involved. Once the contract is agreed and signed, send them a welcome email introducing yourself as well as key stakeholders and let the employee know how the onboarding process will be managed and the timeframes involved.
-  Within one week of start date, communicate (preferably on a call) with new employee about what they'll need to provide on their first day so they can get everything ready, as well as enquire about their set up at home and what equipment they need (find out any accessibility needs), and tell them what to expect on their first day. Also mention things like start time and dress code.
-  Ensure equipment that has been used by previous employee has been wiped and cleared of any personal information, and is ready for a new user.
-  Send any computer equipment/phone (if home onboarding), as well as any home office equipment they need to work healthily and safely*. Things to think about: chair, screen, mouse, keyboard, laptop stand, lumbar support, headphones.
-  Send any company branded stationery/merchandise.
-  Set up employee on company email (including email groups), HR software, communication tool such as Slack, and any other software that is needed for their role.
-  Identify and schedule any mandatory training.
-  Complete a right to work check*.
-  Organise access to office eg. fob key.

First day

-  Set up a call with line manager and HR to welcome new employee. Set out a schedule for the first week of introductions, HR onboarding, goal settings for probation. Don't overload them with too much information at this point so keep these meetings relatively short.

- 🏢 If in the office, conduct a tour of the office to include toilets, showers, reception, meeting spaces, kitchen etc.
- 🤝 Introduction to/welcome from CEO.
- 📄 Induction with HR* - documents needed: P45 from previous employer, passport (HR must store a copy), bank details, GDPR/privacy policy/data retention schedule, new starter form, contact info for emergency contacts and any necessary medical information.
- 💰 Enrol for payroll* (start date, pension contributions, salary, holiday allowance).
- 🤖 Assign buddy - this is a person the new employee can go to for introductions, general company info, the first point of contact should they have any non-specific questions.
- 📅 Set probation review date.
- ❤️ Send welcome email to team/have welcome call.
- 🖋️ Invite new employee to any relevant meetings.
- 🍔 Organise a welcome lunch.
- 🇮🇹 Provide an org chart or list of people in the company and what they do/ a team/company crib sheet.

First week

- 🧑 Ensure new employee has met all key employees.
- 📁 Ensure line manager has provided goals/success criteria for probationary period and has gone through with new employee, as well as detailed the job requirements, customers/clients, responsibilities and expectations.
- 🗣️ Introduction to clients/customers.
- ✍️ Meeting with new employee introducing company mission, vision and values, as well as overview of company history and plans for the future.
- 📋 Check in with HR to ensure new employee has everything they need - go through pay process, probation process, performance review process, employee benefits, expenses.

First month

- 🚀 Identify any training/development needs and schedule.
- 😊 Check in regularly.
- 🛠️ Continue with going through roles and responsibilities, expectations.

First three months

- 🧠 Enrol for benefits not enrolled at start date (eg pension, private healthcare).
- 🤝 Probation review - go through expectations set at the start and measure success and progress. Give feedback for improvements, request feedback from employee.

For any questions or advice on onboarding or your operations, please contact:

[Amy Walkers](#), [Start Ops](#) – we build operations departments for startups – releasing time for founders to concentrate on where they have the most impact, whether that's at home or at work.

amy@start-ops.uk



Recruitment guide for your startup

Preparation

 With your team, agree on what 'hard work' means to you. To some people it looks like working from 6am until 10pm. To others, it means a concentrated period of time where deep work happens. Make sure that aligns with the behaviours you want to see in your company.

 Always always set in stone the interview process at the start and communicate that to all candidates. No one wants a surprise round (or two) as this erodes trust!

 Get alignment on your interview panel for the skills you're looking for - eg. If creativity is important, agree on what that looks like for the company.

 Create a page on your website dedicated to hiring - display your mission and values so candidates can see what your story is. This is a great chance to show what you do, as well as how you do it and who you do it with. Have a team page so candidates can see who they will be working with; this is your chance to show off your diversity and character as a company. Candidates trust employees more than the company itself, so let your team do the talking.

 Make the whole process as timely as possible - you can easily lose candidates along the way to other processes that are quicker. Set out the time frames to candidates at the start.

 Companies often only search for people who are actively looking for work. However, 87% of people are open to new work if presented with the right opportunity - hire the best in the market, rather than the best on the market.

 In the hiring process look to emphasise soft skills such as resilience, curiosity, humility, emotional intelligence, problem solving and adaptability - jobs and job roles change and evolve in startups and it's essential that the people you hire have the soft skills to move with you. Technical skills are great but if your candidate doesn't have the complementary soft skills then they might not be the best fit. Design your interview questions to elicit these responses.

Job descriptions/initial screening

 A job description is not a job advert, so don't treat them the same. A job advert is marketing material - shorter, punchier, a value proposition for the candidate that makes them want to work for you.

 What are the best outcomes for this role in 18 months time? Set this out in the job advert so everyone is aware of expectations.

 Don't obsess over education - not everyone took the same path.

 Look deeper behind logos - dig deeper into what the candidate actually did. Also, job titles look different in all companies. Again, find out exactly what they did.

The interview

 Startups are a special kind of company; make sure candidates are up for it, rather than just up to it.

 Be up front with the challenges the company faces from the start - no one likes to be blindsided!

 I'm a big fan of sending questions to candidates ahead of time - it's often really hard to think of complex situations on the spot, and candidates often feel like they can't think of all the nuances to make the best impression. This is also a good way to foster inclusivity for neurodivergent candidates.

 Candidates are inspired by the founders - the impression you make is often the decider in whether a candidate accepts a job offer. No pressure!.

 I always encourage the whole team to submit questions to ask candidates - they're the ones who will be working with your new team member. These could be less 'serious' questions to assess cultural fit, personality and humour - all essential in startup life!

Here are some great questions to ask candidates during interviews:

 Why does working for a startup particularly excite you? (This allows you to see how their personality matches with startup life eg. pace, agility, adaptability, resilience, dealing with the unexpected, versatility etc)

 Tell us about a time when you solved a problem with limited resources. (This looks at their creativity and how they can think outside the box)

 What does diversity of thought mean to you and why would you say it's important for this company? (This shows the candidate's capability to champion and encourage inclusivity)

 Describe a situation in which you had to learn a new skill quickly to accomplish a task. (This looks at agility and attitude towards learning)

 What is the biggest failure/set back you've experienced and how did you move forward from it? (This looks at resilience and ability to learn from experience and reframe it)

 What is your proudest achievement? (An opportunity to show off about it and share their success!)

 As well asking them to talk about their work experience, ask them to tell you about them as a person - get to know them! Ultimately, do you want to work with this person?

For any questions or advice on recruitment or your operations, please contact:

[Amy Walkers](#), [Start Ops](#) – we build operations departments for startups. We come in when you, the Founder, is doing all the payroll, recruitment, onboarding, finance/accounting and HR and no longer has the time to do this, up to when you need a full time hire. This releases time for you to have more impact elsewhere, whether that's at home or at work.

amy@start-ops.uk



This is me!

ADD COMPANY LOGO HERE AND ADD COMPANY DETAILS IN FOOTER

SICKNESS SELF-CERTIFICATION

Self-certification is required for all periods of absence up to and including 7 days, after which a doctor's certificate will be required.

PRIVATE & CONFIDENTIAL

Name:

PERIOD OF ABSENCE

I was absent from work due to sickness or injury from:

First date of absence:

Date of return:

Number of working days absent:

Date recovered:

DETAILS OF SICKNESS OR INJURY:

I was unfit for work for the following reason:

Did you consult a medical practitioner in connection with this absence? Yes/no
If yes, provide details of what was said:

DECLARATION:

I certify that I have been incapable of work because of my sickness/injury on the dates shown, [OPTIONAL: and that I have not worked for any employer during this period] and that this information is true and accurate.

Signature

Date

Reference template builder

Basic (recommended):

- Position held at your organisation:
- Dates of employment:

Detailed (recommended):

- Job title and main duties:
- Sickness or absence record – please do not include absences related to disability or to parental rights:
- Any current, relevant disciplinary records:
- Given reason for leaving job:

Character (choose three to keep your reference succinct):

- Your relationship to the applicant:
- How long have you known [him/her/them]?
- We would love to know why [applicant] has been great to work with:
- To what do you think [applicant] will contribute most at [new company]?
- What is the best way to help and support [applicant] in [his/her/their] new role with us?
- What do you think is [candidate's] greatest achievement at your company?
- Would you hire [candidate] again? If not, why not?
- What do you think is [candidate's] most valuable skill?
- Was [candidate] promoted while at your company? If so, from what to what and in what timeframe?
- What will our team learn from [candidate]?
- How would you like to see [candidate] develop over the next year?
- If you were to meet [candidate] in five years, what would you not be surprised to learn about [him/her/them]?
- If there's one piece of advice you would give to [candidate], what would it be?
- What do you think are [candidate's] best qualities?
- Is there anything we can do to ensure [candidate] thrives with us?
- What are [candidate's] best growth opportunities?

For more information or help, please contact amy@start-ops.uk

(This is designed to be a menu – please select relevant questions for your business)

EXIT INTERVIEW

Name:

Date:

Your role:

What circumstances prompted you to start looking for another job?

Under what circumstances, if any, would you consider returning to [company]?

To what do you think you contributed most?

Do you feel your job description changed since you were hired, and if so, in what ways?

Did you feel you had the tools, resources and working conditions to be successful in your role? If not, which areas could be improved and how?

Do you feel you had the necessary training to be successful in your role? If not, how could it have been better?

Did you feel your skills were fully utilised? If not, how could they have been?

The Company:

To what extent do you think employee contributions are recognised? If not, how do you think this could be improved?

Were there any company policies you found difficult to understand? How can we make them clearer?

How would you describe company culture?

How would you describe your manager? How would you improve their management style?

What was the best part of your job here?

Do you feel like the company is open and transparent? In what ways could internal communication be improved?

Improvements:

What can we improve on?

Do you have any suggestions for improving employee morale and experience?

Concerns:

Do you have any concerns about [company] you'd like to share?

Is there anything else you'd like to add?

[DATE]

Dear [Employee Name]

Re: Probationary Period

As you are aware, your appointment with [company] was subject to a probationary period of [x] months. Following regular reviews throughout your probation period, I am delighted to inform you that you have successfully completed this probationary period and your employment will now continue with the Company as a permanent member of the team.

[Option: list here some of the things you were particularly impressed with or list any improvements you wish the employee to make]

Your probationary period counts towards your continuous service with the organisation. All terms and conditions as detailed in your contract of employment, issued to you when joining, remain unchanged.

I would like to take the opportunity to congratulate you on your hard work to date and I look forward to continuing our work together.

Yours sincerely

[name and position]

[DATE]

PRIVATE & CONFIDENTIAL

Name
Address
Address

Payrise

Dear [NAME],

This letter is to confirm changes to your terms and conditions of employment as follows:

As of [DATE] the following will apply:

Your salary will increase to £[XX,000].

All other terms and conditions of your employment remain unchanged.

Please confirm your agreement by signing the bottom of this letter and sending it back to [NAME].

You should keep a copy of this letter with your contract of employment as this represents a change to your terms and conditions of employment.

Yours sincerely

[NAME]
[POSITION]

Signed: Date:

I confirm and agree to the changes to my terms and conditions as detailed above

NAME
ADDRESS
ADDRESS
ADDRESS

DATE

Dear NAME,

This letter is to confirm changes to your terms and conditions of employment as follows:

As of DATE the following will apply:

- Your normal hours of working, as detailed in clause NUMBER of your contract of employment, will be changed to [8:30am – 5pm].

All other terms and conditions of your employment remain unchanged.

Please confirm your agreement to the changes we have discussed by signing the footer of this letter. Please return this signed letter by email to NAME by DATE.

You should keep a copy of this letter with your contract of employment as this represents a change to your terms and conditions of employment.

Yours sincerely

NAME
POSITION

I confirm that I have been consulted with and agree to the changes in detailed in this letter.

Signed..... Dated.....

New starter information for: [company name]

FOR COMPLETION BY EMPLOYEE

The information you provide on this form will be provided to HM Revenue & Customs (HMRC) so that we can process your pay and deal with the PAYE tax, etc. Please note that you have a legal obligation to give full and accurate information so that HMRC can correctly identify you. The forenames you include on this form *must* be your full given forenames as shown on your birth certificate and not abbreviations or nicknames.

Title	
Full given forename(s)	
Surname (inc double-barrelled)	
Gender	
Address	
Email address	
Date of birth	
NI number	
Start date	
Permanent or temporary	
Right to work confirmed	
Normal weekly hours over how many days	
Salary	
Bank details: Account name	
Bank	
Account number	
Sort code	

Please answer the following questions by placing an X in the appropriate box.

Do you have a P45 for the current tax year? Yes ☐ No ☐

If yes, please attach the P45 when returning this form.

If no, you must complete the Employee Statement below.

You must complete the Student Loan questions below regardless of whether you have a P45.

Employee statement – put an X in the statement that applies	
☐	A – This is my first job since last 6 April and I have not been receiving taxable Jobseeker's Allowance, Employment and Support Allowance, taxable Incapacity Benefit, State Pension or Occupational Pension.
☐	B – This is now my only job but since last 6 April I have had another job but I do not have a P45, and/or I received taxable Jobseeker's Allowance, Employment and Support Allowance or taxable Incapacity Benefit. I do not receive a State Pension or Occupational Pension.
☐	C – As well as my new job, I have another job and/or receive a State Pension or Occupational Pension.
☐ Yes – student loans should not be made through payroll ☐ No – please complete the Student Loan plan type section below	Student Loans - Do any of the following statements apply to you: • You do not have any Student or Postgraduate Loans • You're still studying full-time on a course that your Student Loan relates to • You completed or left your full-time course after the start of the current tax year, which started on 6 April • You're already making regular direct debit repayments from your bank, as agreed with the Student Loans Company
☐ Plan 1 ☐ Plan 2 ☐ Plan 5 ☐ Post-grad loan	To avoid repaying more than you need to, tick the correct Student Loans that you have - use the HMRC guidance on student loans if unsure: https://www.gov.uk/repaying-your-student-loan/which-repayment-plan-you-are-on

Employee Approval

I confirm that the information above, including the Employee Statement, is complete and accurate to the best of my knowledge. I understand that my personal details will be submitted to HM Revenue & Customs.

If completed, I authorise the deduction of the above items from my salary.

Signed (employee).....Date: