

Employee onboarding and first-week setup

Manual | 12 steps | 4 roles | Created Sep 2, 2026 | Updated Sep 2, 2026 | v1

How HR, IT, and the hiring manager get a new starter access, equipment, and a structured first week.

TRIGGER

When a signed offer is returned, at least five working days before the start date.

12 STEPS

1 HR Lead records the confirmed start date and role, and notifies the Line Manager and IT Administrator in a single message.

Within one working day of the signed offer

One notification to both, not a chain. Sequential handoffs are where the pre-start work stalls.

2 IT Administrator requests every account, licence, and permission the role needs, working from the role's standing access list.

At least three working days before the start date

Maintain a standing list per role rather than rebuilding it from memory each time. The items that get missed are never the obvious ones: it is the vendor portal, the shared inbox, the one licence with a procurement lead time.

3 IT Administrator confirms whether every requested item will be ready before the start date.

All ready: Go to step 5: Line Manager assigns an Onboarding Buddy and books a first-week schedule with named sessions and owners.

Something will be late: Go to step 4: IT Administrator tells the Line Manager which items are late and the expected date, so week one can be planned around them.

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A known gap is manageable. Discovering it at 9am on day one is not, and it is the new hire who absorbs the cost.

Plan adjusted: Go to step 5: Line Manager assigns an Onboarding Buddy and books a first-week schedule with named sessions and owners.

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Before the start date

A named buddy who is not the manager. New hires ask their buddy the questions they are embarrassed to ask their manager, and those are the questions worth capturing.

6

Line Manager sends the new hire their first-week schedule and what to expect on day one before they start.

At least one working day before the start date

Include the practical details people are anxious about: what time, where, who to ask for, what to bring.

7

IT Administrator hands over equipment and walks the new hire through logging into every system on day one.

Walk through it together rather than sending credentials and hoping. This is where an access gap surfaces while it can still be fixed the same morning.

8

Onboarding Buddy asks the new hire to keep a running list of every question they had to ask a person, and explains that logging the question is part of the job.

State explicitly that asking is expected. Otherwise people stay quiet to avoid looking slow and the list stays empty, which loses the most valuable data of the whole process.

9

Line Manager holds an end-of-week-one check-in covering what is unclear and what is blocked.

End of the first week

On track: Go to step 10: Onboarding Buddy and new hire turn the question log into documentation, with the buddy correcting anything factually wrong.

Blocked on access or equipment: Go to step 4: IT Administrator tells the Line Manager which items are late and the expected date, so week one can be planned around them.

10

Onboarding Buddy and new hire turn the question log into documentation, with the buddy correcting anything factually wrong.

The person who just learned a task writes better instructions for it than the expert, because they still remember which parts were confusing. The expert has forgotten, which is why expert-written onboarding docs skip exactly the steps beginners get stuck on.

11

Line Manager holds a 30-day review against the role's expectations and agrees what the next 60 days look like.

Day 30

12

HR Lead confirms every step is complete and closes the onboarding record.

Anything outstanding needs a named owner and a date rather than being closed optimistically.

Complete: Ends the procedure

Items outstanding: Go to step 4: IT Administrator tells the Line Manager which items are late and the expected date, so week one can be planned around them.

ROLES INVOLVED

HR Lead

Line Manager

IT Administrator

Onboarding Buddy

REVIEW CADENCE

Twice yearly, and after any onboarding where something was late. A new hire who waited three days for access is the most reliable source of edits to this document.

Name the person accountable for this procedure before you put it into use.

CHANGE THESE BEFORE YOU USE IT

- Build the standing access list in step 2 for each of your roles. That list is the single highest-value part of this procedure and it cannot be generic.
- Adjust the lead times to your slowest procurement or provisioning step, since that is what actually sets the deadline.
- If you run formal probation, align the 30-day review in step 11 with the probation dates so the two are not separate conversations.
- For remote hires, add equipment shipping with real transit time to step 2, and make step 7 a scheduled call rather than a desk visit.

This is a free starting point from sendabrief.com, not compliance advice. It is written to be adapted.

Source: <https://sendabrief.com/templates/employee-onboarding-first-week>