



New Job Checklist™

A practical checklist for preparing well, settling in and building momentum in a new role.

ROLE: _____

START DATE: _____

EMPLOYER: _____

MANAGER: _____

1 | Confirm the Offer

- ☐ Review the written offer, job title, salary and start date.
- ☐ Confirm working hours, location, reporting line and probation arrangements.
- ☐ Understand benefits, leave, notice and any conditions of employment.
- ☐ Ask questions about anything unclear before accepting.
- ☐ Save the offer and employment documents securely.

2 | Complete Pre-Start Tasks

- ☐ Return requested forms and evidence by the deadline.
- ☐ Provide payroll, tax, pension and bank details securely.
- ☐ Complete background, identity or right-to-work checks where required.
- ☐ Read essential policies and pre-boarding information.
- ☐ Tell the employer about agreed adjustments or accessibility needs.
- ☐ Confirm the correct contact for pre-start questions.

3 | Plan the First Day

- ☐ Confirm arrival time, location or remote login instructions.
- ☐ Plan the journey and allow contingency for delays.
- ☐ Check dress expectations and any equipment requirements.
- ☐ Know whom to ask for when you arrive.
- ☐ Prepare lunch, water, identification and a way to take notes.
- ☐ Set a calm evening and morning routine before starting.

4 | Prepare Your Introduction

- ☐ Write a short introduction covering your role and relevant background.
- ☐ Prepare a few questions about the team and current priorities.

THE FUTURE™

- ☐ Review the organisation's products, services, customers and recent news.
- ☐ Refresh the essential skills or terminology used in the role.
- ☐ Set a personal intention for the first week.
- ☐ Avoid making assumptions based only on your previous workplace.

5 | First-Day Essentials

- ☐ Complete the welcome, safety and workplace orientation.
- ☐ Confirm emergency procedures and important building information.
- ☐ Collect and test required equipment, passes and accounts.
- ☐ Record the names and roles of people you meet.
- ☐ Clarify the plan for the first week.
- ☐ Ask where key documents, help channels and team information are stored.

6 | Understand the Role

- ☐ Review the job description with your manager.
- ☐ Clarify the most important outcomes for the first 30, 60 and 90 days.
- ☐ Agree how success will be measured.
- ☐ Identify immediate priorities, deadlines and dependencies.
- ☐ Understand what decisions you can make independently.
- ☐ Confirm how and when to raise risks, delays or questions.

7 | Learn the Team & Organisation

- ☐ Understand how your team contributes to wider organisational goals.
- ☐ Identify key colleagues, customers and partner teams.
- ☐ Learn who owns important decisions and processes.
- ☐ Observe communication styles, meeting norms and working rhythms.
- ☐ Schedule useful introductory conversations without overcrowding the calendar.
- ☐ Keep notes on names, responsibilities and follow-up actions.

8 | Master Tools & Processes

- ☐ Set up secure access and multi-factor authentication.
- ☐ Learn the core systems, file locations and naming conventions.
- ☐ Complete mandatory training by the required dates.
- ☐ Understand approval, expense, leave and support processes.
- ☐ Practise the main workflow using a low-risk task.
- ☐ Ask before changing shared systems or established processes.

9 | Build Strong Working Habits

- ☐ Agree how often you and your manager will check in.
- ☐ Keep a running list of questions and discuss them efficiently.
- ☐ Track commitments, deadlines and follow-up actions.
- ☐ Protect focused learning time as well as meeting time.
- ☐ Ask for examples of strong completed work.
- ☐ Summarise important decisions in writing when useful.

10 | Create Early Value

- ☐ Complete a small useful task that supports a real team priority.
- ☐ Use existing knowledge while respecting local context.
- ☐ Share progress before the deadline, not only at completion.
- ☐ Ask for feedback early enough to act on it.
- ☐ Document a lesson, improvement or resource for future use.
- ☐ Avoid promising major changes before understanding the system.

11 | Protect Wellbeing & Boundaries

- ☐ Learn expected working hours and communication boundaries.
- ☐ Set up an ergonomic workspace and take appropriate breaks.
- ☐ Build a sustainable commute or remote-work routine.
- ☐ Ask for help before workload or uncertainty becomes unmanageable.
- ☐ Use available wellbeing, employee support and adjustment resources.
- ☐ Protect rest outside work while your brain adapts to the new role.

12 | Review 30 / 60 / 90 Days

- ☐ Compare progress with the agreed priorities and measures.
- ☐ Record achievements, feedback, lessons and unresolved questions.
- ☐ Ask your manager what is going well and what should change.
- ☐ Update goals as your understanding of the role improves.
- ☐ Identify the next skills, relationships or processes to strengthen.
- ☐ Keep an evidence log for probation and future development conversations.

13 | Builder Tip

LEARN THE CONTEXT BEFORE TRYING TO PROVE EVERYTHING.

Your first weeks are for listening, learning and building trust. Be reliable, ask thoughtful questions and create small amounts of genuine value; momentum will follow.

The future isn't something you wait for. It's something you build.