# **Comprehensive Accounting Employee Onboarding Checklist**

## Pre-Onboarding (Before Day 1)

* **Assign an onboarding buddy or mentor**

Provide a peer guide to support informal learning and answer day-to-day questions.

* **Set up all systems access and tech**

Create logins for email, practice management tools, shared drives, document storage, and time tracking software.

* **Prepare the 30-60-90 Day Development Plan**

Outline learning milestones, KPIs, and role-specific goals.

* **Tailor training materials by role**

Provide targeted learning for tax, AR/AP, client services, etc.

* **Provide internal SOPs and firm walkthroughs**

Include key workflows (month-end close, BAS, reconciliations, etc.) with videos or guides.

* **Encourage new hire to document any questions or unclear processes**

Turn fresh feedback into process improvements.

## Formal Welcome & Integration (Day 1 - Week 1)

* **Welcome call with their manager**

Create a personal and professional introduction to the team and their role.

* **HR onboarding session**

Review benefits, payroll, time-off policies, and the employee handbook.

* **Introduce to team and key personnel**

Help the new hire understand who does what and where to go for support.

* **Optional: Leadership welcome video or session**

Introduce your firm’s mission, leadership, and vision.

## Tools, Systems & Training (Week 1 - 2)

* **Confirm tech setup is functional and secure**

Test logins, permissions, security protocols, and device setup.

* **Provide training checklists and videos for core tools:**
  + **Practice Management Software** (e.g., Karbon, Xero PM)
  + **Workflow Automation Tools** (e.g., Jetpack Workflow)
  + **Document Management Systems** (e.g., FYI Docs, SuiteFiles)
  + **Client Proposal & Billing Tools** (e.g., Ignition, GoProposal)
  + **Time Tracking Software** (e.g., QuickBooks Time, Harvest)
  + **Internal Communication Tools** (e.g., Slack, Notion, Loom)
* **Grant access to self-serve resources**

Point them to your SOP library, knowledge base, and training hub.

## Feedback & Performance Tracking (Week 2 - 12)

* **Weekly 1:1 check-ins with manager (First Month)**

Track progress, resolve concerns, and align on expectations.

* **Informal buddy or peer check-ins**

Foster casual support and reduce hesitations around questions.

* **Pulse surveys and onboarding feedback forms**

Get insights into onboarding clarity and experience.

* **Formal 90-day review & development check-in**

Discuss performance, culture fit, and next-stage goals.

## Team & Culture Integration (First 30 Days)

* **Encourage social participation in team chats or events**

Help remote or hybrid hires feel included.

* **Share mission, vision, and client impact stories**

Build alignment with your firm's purpose.

* **Invite to at least one team meeting or internal initiative by Week 2**

Boost visibility and collaboration.

* **Celebrate early wins**

Recognize first completed tasks, milestones, or client deliverables.

## Accounting-Specific Onboarding Essentials

* **Cover data security and confidentiality protocols**

Include password hygiene, device policies, and MFA setup.

* **Train on firm-specific workflows for services:**
  + Month-end reconciliations
  + Payroll processing
  + BAS/tax prep
  + AP/AR workflows
* **Explain your sales-to-service transition process**

Clarify how client onboarding ties to service delivery.

* **Teach internal escalation protocols**

Provide clear steps for reporting issues, errors, or questions.

## Ongoing Improvements & Optimization

* **Track onboarding KPIs:**
  + Time to productivity
  + 90-day retention rate
  + Onboarding satisfaction
* **Schedule quarterly onboarding process reviews**

Keep materials up to date and relevant.

* **Encourage ongoing feedback from recent hires**

Identify process gaps and clarify confusing steps.

* **Celebrate onboarding milestones**

Recognize team members at 30, 60, 90 days.