

# Onboarding Policy & Checklist

**Organisation:** Northbridge Advisory Partners **Document Owner:** HR Director, People & Culture **Last Reviewed:** Current policy review cycle **Policy Ref:** NAP-HR-ONB-003 **Status:** Active

## 1. Policy Scope

This policy applies to all new hires across Northbridge Advisory Partners, including permanent employees, fixed-term contractors, and returning employees after a break of more than 12 months. It covers the standard onboarding process from offer acceptance through to end of probation (typically 6 months for all grades).

## 2. Onboarding Phases

### Phase 1: Pre-Start (Offer Acceptance to Day 1)

#	Task	Owner	Timeline
1.1	Issue employment contract and collect signed copy	Talent Acquisition Lead	Within 3 business days of acceptance
1.2	Provision IT equipment (laptop, phone, building access card)	HRIS Administrator	5 business days before start date
1.3	Set up HRIS record and payroll enrolment	HRIS Administrator	3 business days before start date
1.4	Send welcome email with first-day logistics		Within 5 business days of acceptance
1.5	Create onboarding buddy assignment		Before start date
1.6	Confirm first-week schedule with hiring manager	Hiring Manager	5 business days before start date

**Note:** Tasks 1.4 and 1.5 do not have an assigned owner in the current checklist. The HRIS Administrator has flagged this gap (ticket HR-SYS-2026-0112) and it is pending the HR Director's review.

### Phase 2: First 30 Days (Orientation & Foundation)

#	Task	Owner	Timeline
2.1	Day 1 welcome session: team introductions, office tour, security briefing	Hiring Manager	Day 1
2.2	Complete mandatory compliance training (data protection, anti-bribery, information security)	New Hire	Within first 5 business days
2.3	Access provisioning verification — confirm all systems functional	HRIS Administrator	End of Week 1
2.4	Role-specific tools orientation	Hiring Manager	Week 1–2
2.5	Initial 1:1 with hiring manager — set 30-day expectations	Hiring Manager	End of Week 1
2.6	Assign first supervised engagement or project	Hiring Manager	By Week 3
2.7	HR check-in: confirm logistics, benefits enrolment, policy questions	HR Coordinator	Week 2

### Phase 3: Days 31–60 (Integration & Skill-Building)

#	Task	Owner	Timeline
3.1	Mid-point check-in with hiring manager	Hiring Manager	Week 5
3.2	Begin shadowing senior team members on client engagements	Hiring Manager	Weeks 5–8
3.3	Complete any role-specific technical certifications	New Hire	By Day 60
3.4	Attend practice-level team meeting and present background summary	New Hire	Weeks 6–8

## Phase 4: Days 61–90 (Contribution & Review)

#	Task	Owner	Timeline
4.1	90-day performance check-in	Hiring Manager	Week 12
4.2	Probation progress note filed in HRIS	HR Coordinator	By Day 90
4.3	Feedback collected from hiring manager, buddy, and at least one peer	HR Coordinator	By Day 85
4.4	Confirm long-term development plan discussion scheduled	L&D Manager	By Day 90

## 3. Mandatory Compliance Training

All new hires must complete the following within their first 5 business days:

1. Data Protection & GDPR Awareness (online, 45 mins)
2. Anti-Bribery & Corruption (online, 30 mins)
3. Information Security Fundamentals (online, 30 mins)
4. Workplace Health & Safety (in-person or virtual, 60 mins)

Completion is tracked via the LMS. Non-completion triggers an automated reminder at Day 5 and an escalation to the hiring manager at Day 10.

## 4. Probation Period

Standard probation is 6 months for all grades. For senior consultant grades (SC-3 and above), the policy references a 3-month probation, but this was not updated after the recent grade restructure. The HR Director has confirmed verbally that 6 months applies to all grades under the current policy interpretation, but the written policy document still references the legacy 3-month period for SC-3+.

**Probation review process:**

- Formal review meeting at 3 months and 6 months
- Hiring manager completes probation assessment form
- HR Coordinator files completed assessment in HRIS
- Extension of probation requires HR Director approval

## 5. Onboarding Buddy Programme

Each new hire is assigned a buddy from outside their direct team for the first 90 days. The buddy provides informal guidance on culture, systems, and navigation.

**Current issue:** The buddy programme was paused for the Managed Services division in a prior planning period due to capacity constraints. It has not been formally reinstated. The People & Culture team confirmed in a recent communication that buddies should be assigned for all divisions, but the Managed Services team lead has not acknowledged this direction.

## 6. Tools and Systems Access

Standard access provisioned for all new hires:

System	Access Level	Provisioning Owner
Microsoft 365 (email, Teams, SharePoint)	Full	HRIS Administrator
HRIS (Workday)	Employee self-service	HRIS Administrator
Time & Expense (Concur)	Standard submitter	HRIS Administrator
ATS (Greenhouse)	View own application record	HRIS Administrator
Practice tools (varies by department)	As specified by hiring manager	Hiring Manager request → HRIS Administrator

System	Access Level	Provisioning Owner
Client project platforms	Per engagement assignment	Practice Head / Project Lead

**Note:** The Client Project Platforms row was added in a recent table update, but the provisioning SLA has not been defined. Turnaround varies from 1 day to 2 weeks depending on client security requirements.