

# Company Essentials Checklist

(sample)

*Examples of typical information and reports to help HR leaders get to know the business quickly*



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Use the **Essentials** checklist to track down company information and reports and get to know the business quickly

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# The Essentials Checklist (Sample)

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Category	Name of report or information	Notes
1. Company Profile	<input type="checkbox"/> Organisation charts	<ul style="list-style-type: none"> <li>Look for consistency of job titles, number of spans and layers and number of direct reports per leader.</li> </ul>
	<input type="checkbox"/> Employee list	<ul style="list-style-type: none"> <li>If applicable for your role, request a list of employees including location, start date, full or part time status, management level, permanent or contractor, front line or support role, age bracket.</li> <li>Prepare insights based on an analysis of employee demographics.</li> <li>Depersonalise information if required.</li> </ul>
	<input type="checkbox"/> Annual review of results	<ul style="list-style-type: none"> <li>An annual review of results contains useful information including financial performance, employee engagement, strategic priorities, risks, community and people priorities.</li> </ul>
2. Culture	<input type="checkbox"/> Company purpose, vision and values	<ul style="list-style-type: none"> <li>Often published on the company website.</li> </ul>
	<input type="checkbox"/> Culture survey results (last 1-3 years)	<ul style="list-style-type: none"> <li>Check feedback from exit surveys.</li> </ul>

*Please note this is a sample of the full checklist*

**Important note** – your role may not require access to confidential or sensitive information. Be selective about the information you gather based on role requirements. Use the **Head Start Questions** as prompts to assess each area.

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Category	Name of report or information	Notes
<b>10. HR policies and procedures</b>	<u>Important policies and procedures</u> <ul style="list-style-type: none"> <li><input type="checkbox"/> Workplace health and safety</li> <li><input type="checkbox"/> Equal employment opportunity (EEO), bullying, harassment and discrimination</li> <li><input type="checkbox"/> Code of conduct</li> <li><input type="checkbox"/> Performance counselling and discipline</li> <li><input type="checkbox"/> Drugs and alcohol</li> <li><input type="checkbox"/> Complaints and grievances</li> <li><input type="checkbox"/> Leave (personal, compassionate, parental, domestic and family violence)</li> <li><input type="checkbox"/> Privacy</li> <li><input type="checkbox"/> Whistleblower</li> <li><input type="checkbox"/> Internet, email and social media</li> <li><input type="checkbox"/> Social media</li> <li><input type="checkbox"/> Working from home</li> <li><input type="checkbox"/> Gifts and hospitality</li> </ul>	<ul style="list-style-type: none"> <li>• The <b>Head Start</b> section contains a comprehensive list of HR policies and procedures.</li> </ul>

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Category	Name of report or information	Notes
<b>20. Risk and audit</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> List of risks, assessment of impact, likelihood of occurrence and controls in place.</li> <li><input type="checkbox"/> Business continuity plans for critical processes (e.g. Payroll).</li> </ul>	
<b>21. Strategy</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Company strategy and objectives for the next 1-3 years.</li> <li><input type="checkbox"/> HR strategy and objectives.</li> <li><input type="checkbox"/> Employee value proposition (EVP)</li> </ul>	

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Category	Name of report or information	Notes
<b>22. Systems</b>	Automated HR systems in place or planned: <ul style="list-style-type: none"> <li><input type="checkbox"/> Employee records</li> <li><input type="checkbox"/> Recruitment</li> <li><input type="checkbox"/> Learning</li> <li><input type="checkbox"/> Payroll</li> <li><input type="checkbox"/> Time and attendance</li> <li><input type="checkbox"/> Talent</li> <li><input type="checkbox"/> Employee engagement</li> <li><input type="checkbox"/> Health and safety</li> <li><input type="checkbox"/> Performance management</li> <li><input type="checkbox"/> Leave</li> <li><input type="checkbox"/> Reporting and analytics</li> <li><input type="checkbox"/> Rewards</li> <li><input type="checkbox"/> Workforce planning</li> </ul>	

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Category	Name of report or information	Notes
<b>25. Team operating rhythm</b>	Team schedule including: <ul style="list-style-type: none"> <li><input type="checkbox"/> 1-1 meeting</li> <li><input type="checkbox"/> Skip level meeting</li> <li><input type="checkbox"/> Operational HR meeting</li> <li><input type="checkbox"/> Strategic leadership meeting</li> <li><input type="checkbox"/> Mid and end of year reviews</li> <li><input type="checkbox"/> Development conversation</li> <li><input type="checkbox"/> People (talent, critical roles, succession)</li> <li><input type="checkbox"/> All team meetings</li> <li><input type="checkbox"/> Lunch and learns</li> <li><input type="checkbox"/> Team development offsite</li> <li><input type="checkbox"/> Strategy planning</li> <li><input type="checkbox"/> Budget planning</li> <li><input type="checkbox"/> Social events</li> </ul>	
<b>26. Third party suppliers</b>	<input type="checkbox"/> List of vendors used by the HR team, purpose, cost, usage and performance.	

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