

Onboarding

checklist

Streamline your onboarding process and boost employee engagement from day one.

Pre-Start Date

Welcome Email:

- Send a welcome email with essential information (start date, time, location, dress code).
- Attach a company handbook and any necessary forms for the new hire to complete.

Technology Setup:

- Ensure laptop, email account, and other necessary tools are ready.
- Provide login details for company systems and software.

Workspace Preparation:

- Set up a clean and welcoming workspace with necessary supplies.
- Add a welcome note and some company swag to the desk.

HR and Benefits Overview:

- Review HR policies, benefits, and procedures.
- Assist with completing any outstanding paperwork.

Day 1: First Day

Meet and Greet:

- Welcome the new hire at the entrance or reception.
- Introduce them to their team and key colleagues.
- Provide a tour of the office, including key areas (kitchen, restrooms, meeting rooms).

Orientation Session:

- Conduct an orientation session covering company culture, mission, and values.
- Review the organizational structure and key departments.

Technology Introduction:

- Ensure the new hire's computer and email are set up.
- Provide a walkthrough of essential software and tools.

Lunch:

- Arrange a team lunch to welcome the new hire.



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Week 1 : Getting Settled

Job Role Overview:

- Discuss job responsibilities, expectations, and goals.
- Provide an overview of ongoing projects and immediate tasks.

Meet with Manager:

- Schedule a one-on-one meeting to discuss initial impressions and answer any questions.
- Set expectations for the first 30, 60, and 90 days.

Training Sessions:

- Arrange training on company systems, processes, and relevant tools.
- Provide access to online training resources and courses.

Shadowing Sessions:

- Set up shadowing sessions with team members to understand workflows and processes.

Week 2: Engagement

Role-Specific Training:

- Conduct deeper training sessions focused on specific tools, software, and processes relevant to the new hire's role.
- Schedule hands-on workshops to practice new skills.

Project Involvement:

- Assign the new hire to small projects or specific tasks within larger projects to start contributing meaningfully.
- Provide a clear outline of project goals, timelines, and expected outcomes.

Continued Team Integration:

- Facilitate team-building activities or informal gatherings to further integrate the new hire into the team.
- Arrange one-on-one meetings with key team members to discuss collaboration and workflow.



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30 day Check In

Performance Feedback:

- Conduct a one-on-one meeting to review progress and provide feedback.
- Discuss any challenges and provide additional support if needed.

Goal Setting:

- Revisit and adjust initial goals based on the new hire's experience so far.
- Set clear objectives for the next 30 days.

60 Day Check In

Project Review:

- Evaluate the new hire's contributions to projects and overall performance.
- Discuss areas of strength and opportunities for improvement.

Team Integration:

- Assess how well the new hire has integrated with the team.
- Address any team dynamics or collaboration issues.

Training Needs:

- Identify any additional training or resources needed for further development.
- Provide recommendations for professional development opportunities.



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90 day Check In

Comprehensive Review:

- Conduct a thorough performance review with the new hire.
- Discuss achievements, challenges, and overall job satisfaction.

Long-Term Goals:

- Set long-term goals and development plans.
- Discuss career aspirations and potential growth opportunities within the company.

Feedback Session:

- Gather feedback from the new hire about the onboarding process.
- Use the feedback to improve future onboarding experiences.

Ongoing Support

Regular Check-Ins:

- Schedule regular check-ins with the manager to continue providing support.
- Encourage open communication and ongoing feedback.

Mentorship Program:

- Pair the new hire with a mentor for additional guidance and support.

Continuous Learning:

- Provide access to continuous learning opportunities and professional development resources.



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