



The Ultimate Onboarding Checklist

Ensuring New Employees are Set Up for Success

Pre-First Day

Onboarding should start before your new employee's actual first day. These early steps will create a positive early impression and kick off an organized, well-thought out onboarding plan.

- ☐ Welcome email
- ☐ Announce new hire company-wide
- ☐ Order/organize/deliver equipment
- ☐ Setup workstation (in-office) or send home office accessories (remote)
- ☐ Create account in HR system
- ☐ Send out HR paperwork
- ☐ Share employee handbook and other HR policies
- ☐ Create email and additional work-related accounts
- ☐ Order security cards, keys, business cards, name badges, etc.
- ☐ Prepare welcome package with company swag

First Day

First days are exciting and extremely busy. Ensure everything is covered and runs smoothly with an efficient and detailed plan. Follow our checklist and you won't miss anything.

- ☐ Greet employee immediately (office) or send welcome email first thing (remote)
- ☐ Introduce to team members and immediate co-workers
- ☐ Show employee their new desk/workstation
- ☐ Give a full office tour (in-person or virtually, if possible)
- ☐ Assign an onboarding mentor
- ☐ Ensure all equipment, logins, and credentials are working properly
- ☐ Introduce employee to Learning Management System
- ☐ Setup welcome lunch with new employee + team (or virtual meet & greet)
- ☐ Have 1-on-1 meeting to end the day
- ☐ Dismiss new employee early

First Week

So much goes into onboarding that it is best to spread out what you can. It is crucial to ease new employees in, not overwhelm them.

- ☐ Schedule meetings with department head and other key people to their role
- ☐ Set short and long term goals with scheduled check-ins
- ☐ Ensure that all equipment and software needs are met
- ☐ Instruct new employees on office policies (information security, dress code, anti-harassment, etc.)
- ☐ Check in with training and next steps
- ☐ Plan team-building activities
- ☐ End week with 1-on-1 meeting

First Month

Acclimating new employees is a long process. During the first month, you should be checking in regularly to learn how the employee performs and check their feelings about their new job.

- ☐ Hold weekly one-on-one's to check in with employee
- ☐ Send out a first month onboarding survey to better understand your process
- ☐ Check in with department head about employee's progress
- ☐ Discuss progress with employee at the end of the month
- ☐ Reiterate/adjust long-term goals
- ☐ Schedule three and six month check-ins