

Onboarding Checklist Template

New Hire Information

Employee Name: [Name]

Position: [Job Title]

Department: [Department]

Start Date: [Date]

Manager: [Manager Name]

Buddy/Mentor: [Buddy Name]

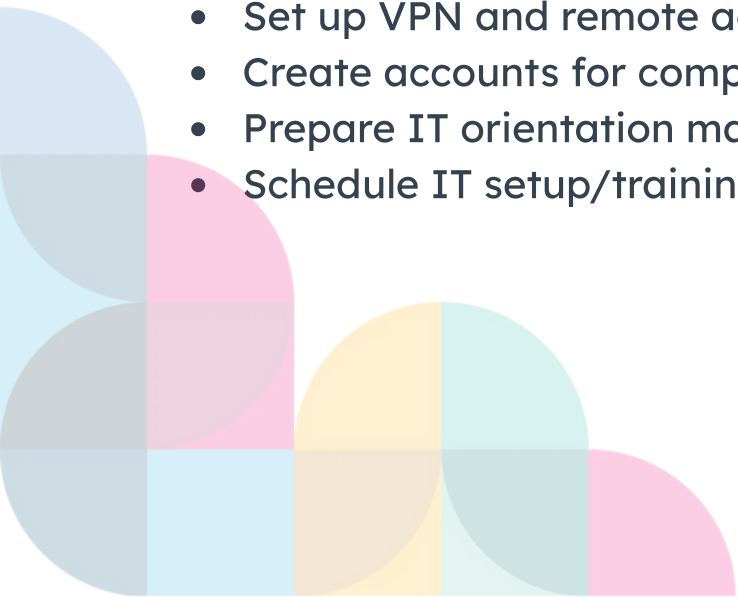
Pre-Boarding (1-2 weeks before start date)

HR Responsibilities

- Send welcome email with first day details
- Mail/email new hire paperwork packet
- Order business cards and name plate
- Set up employee file and documentation
- Schedule first day meetings
- Send calendar invite for first day agenda
- Prepare welcome gift/swag package
- Notify security for badge/access setup

IT Responsibilities

- Order laptop/desktop and peripherals
- Set up email account and distribution lists
- Configure phone/phone system access
- Install necessary software and applications
- Set up VPN and remote access
- Create accounts for company systems
- Prepare IT orientation materials
- Schedule IT setup/training session



Manager Responsibilities

- Prepare workspace and office supplies
- Review job description and initial goals
- Plan first week schedule and meetings
- Identify buddy/mentor for new hire
- Prepare team introduction materials
- Review company handbook and policies
- Set up 30-60-90 day check-in meetings
- Prepare first project assignments

Facilities/Admin

- Assign parking space (if applicable)
- Set up building access and security badge
- Arrange desk/office space
- Stock office supplies
- Add to building directory
- Update organization chart
- Prepare welcome lunch or team introduction



Day 1: Welcome & Orientation

Morning (9:00 AM - 12:00 PM)

HR Orientation (9:00-10:30 AM)

- Personal welcome and check-in
- Complete I-9 and final paperwork
- Review employee handbook
- Explain benefits and enrollment process
- Discuss payroll and timekeeping systems
- Review company policies and procedures
- Provide organizational chart and directory

IT Setup (10:30-11:30 AM)

- Distribute and set up equipment
- Configure email and calendar
- Install software and applications
- Set up VPN and remote access
- Review IT policies and security protocols
- Provide IT contact information

Manager Meeting (11:30 AM-12:00 PM)

- Welcome and personal introduction
- Review role expectations and goals
- Discuss first week schedule
- Introduce to immediate team
- Answer initial questions

Afternoon (1:00 PM - 5:00 PM)

Team Introductions (1:00-2:30 PM)

- Department tour and introductions
- Meet key collaborators and stakeholders
- Review team structure and reporting
- Discuss communication preferences
- Exchange contact information

Company Overview (2:30-3:30 PM)

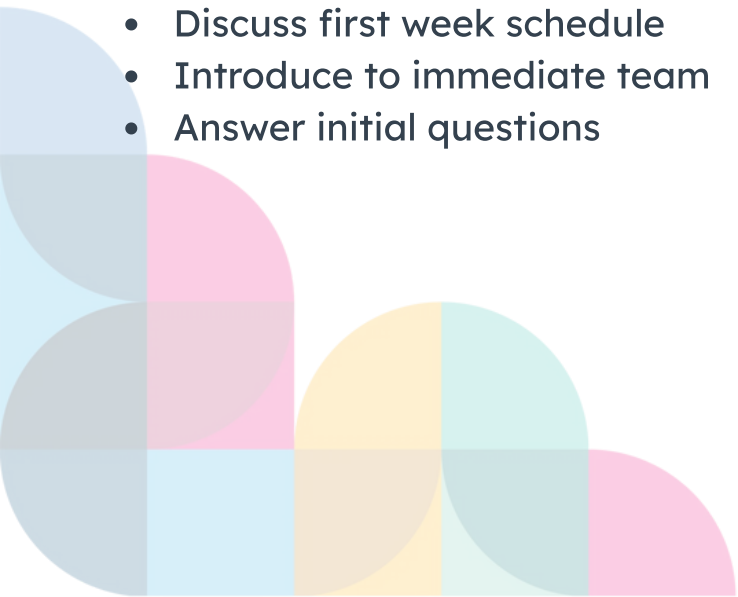
- Company history and mission
- Products/services overview
- Industry and market context
- Current strategic initiatives
- Company culture and values

Workspace Setup (3:30-4:30 PM)

- Personalize workspace
- Organize office supplies
- Set up phone and voicemail
- Configure workspace preferences
- Review building facilities (kitchen, bathrooms, etc.)

Day 1 Wrap-up (4:30-5:00 PM)

- Review day's activities
- Discuss tomorrow's schedule
- Address any immediate questions
- Set up regular check-in schedule
- Provide feedback on first day experience



Week 1: Foundation Building

Learning & Development

- Complete mandatory training modules
- Review job-specific procedures and processes
- Shadow team members in similar roles
- Read relevant company documents and resources
- Begin product/service knowledge training

Relationship Building

- Coffee chats with key team members
- Meet with cross-functional partners
- Introduction to key clients/customers (if applicable)
- Attend team meetings as observer
- Join relevant Slack channels/communication groups

Initial Assignments

- Review and understand current projects
- Complete first small project/task
- Receive feedback on initial work
- Begin involvement in team activities
- Set up regular one-on-one meetings

Check-ins

- Daily manager check-ins (15 minutes)
- End-of-week feedback session
- HR check-in (mid-week)
- Buddy system check-in (ongoing)
- Address any concerns or questions



Week 2-4: Integration & Growth

Skill Development

- Complete role-specific training
- Begin taking on regular responsibilities
- Participate in team projects
- Attend relevant meetings and calls
- Start building industry knowledge

Performance & Feedback

- First formal performance check-in
- Review initial goals and expectations
- Gather feedback from team members
- Adjust workload and responsibilities
- Address any performance concerns

Cultural Integration

- Attend company social events
- Participate in team-building activities
- Join employee resource groups
- Engage with company culture initiatives
- Provide feedback on onboarding experience



30-Day Review

Manager Assessment

- Review job performance and quality
- Assess cultural fit and team integration
- Evaluate progress toward initial goals
- Discuss strengths and development areas
- Set goals for next 30 days

HR Check-in

- Benefits enrollment completion
- Payroll and systems functioning properly
- Address any administrative issues
- Collect feedback on onboarding process
- Review employee handbook questions

Employee Self-Assessment

- Comfort level with role and responsibilities
- Understanding of company culture and values
- Clarity on expectations and goals
- Satisfaction with support and resources
- Areas where additional help is needed



60-Day Review

Performance Evaluation

- Review progress on assigned projects
- Assess skill development and learning
- Evaluate collaboration and teamwork
- Discuss career development interests
- Address any ongoing challenges

Goal Setting

- Set specific 90-day objectives
- Identify development opportunities
- Plan upcoming projects and assignments
- Discuss long-term career aspirations
- Create development plan



90-Day Review

Comprehensive Assessment

- Complete formal performance review
- Evaluate achievement of initial goals
- Assess overall job satisfaction
- Review cultural integration success
- Discuss future career path

Transition to Regular Employment

- Move to standard review cycle
- Adjust goals and expectations
- Plan continued development
- Celebrate successful onboarding
- Document lessons learned for future hires



Onboarding Success Metrics

Completion Tracking

- All paperwork completed on time
- All training modules finished
- All system accesses working
- All introductions completed
- All initial goals set

Feedback Scores (1-5 scale)

- Manager satisfaction: ____/5
- Employee satisfaction: ____/5
- Team integration: ____/5
- Performance readiness: ____/5
- Cultural fit: ____/5

90-Day Outcomes

- Employee retained and engaged
- Performance meets expectations
- Team integration successful
- Cultural alignment achieved
- Ready for independent work

Notes & Observations

Week 1 Notes:

30-Day Notes:

60-Day Notes:

90-Day Notes:

Lessons Learned:

Process Improvements:

HR Signature: _____ Date: _____ Manager

Signature: _____ Date: _____

