New Hire Onboarding Checklist

Bringing new employees on board is more than just paperwork. It's your chance to make a great first impression and set them up for success. A thoughtful, well-planned onboarding process helps new hires feel welcome, understand their role, and get up to speed quickly. This onboarding checklist covers all the important steps to make the process smooth and effective.

Preboarding

Prepare Necessary Documentation

- [ ] Offer letter or employment contract
- [ ] Tax forms (e.g., W4 and I9)
- [ ] Direct deposit authorization form
- [ ] Company policies
- [ ] Employee handbook

Set Up Work Space and Tools

- [ ] Assign a desk, office, or workstation
- [ ] Provide necesarry equipment (e.g., computer, phone, tools)
- [ ] Set up login credentials for access to systems or software
- [ ] Prepare basic office supplies (e.g., pens, notepads, highlighters

Plan Orientation Schedule

- [ ] Schedule meetings for new hire with key team members
- [ ] Organize a tour of the workplace
- [ ] Prepare training session for role-specific tasks
- [ ] Set dates for complaince training (e.g., workplace safety, harassment prevention)

Pre-Meet Introductions

- [ ] Send the employee a pre-start welcome email with any helpful first-day info
- [ ] Introduce the employee to their team via Teams or Slack

Day One

Welcome and Introduction

- [ ] Warmly introduce the new employee to the team
- [ ] Provide a welcome kit (e.g., branded merchandise, snacks, contact list)

Orientation

- [ ] Give an office tour
- [ ] Review company mission, values, culture
- [ ] Explain organizational structure
- [ ] Discuss company policies and procedures

Administrative Tasks

- [ ] Collect signed documents (offer letter, tax forms, etc.)
- [ ] Set up payroll information
- [ ] Explain benefits enrollment process

IT & Security

- [ ] Meet with the employee to provide an overview of your tech stack
- [ ] Introduce company internal communication platforms
- [ ] Schedule cybersecurity trainings
- [ ] Confirm employee's access to all necessary tools
- [ ] Confirm building access (if applicable)

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First Week

Training and Knowledge Sharing

- [ ] Offer role-specific training sessions
- [ ] Provide access to learning materials and resources
- [ ] Introduce the new hire to their mentor or onboarding buddy for guidance
- [ ] Make sure time is set aside for the employee to absorb the information

Performance Expectations, Feedback & Check-Ins

- [ ] Review job responsibilities and expectations
- [ ] Discuss performance metrics and evaluation process
- [ ] Set short-term and long-term goals
- [ ] Schedule one-on-one meetings with supervisors
- [ ] Encourage questions and address concerns
- [ ] Provide constructive feedback on initial tasks

Long-Term Onboarding & Ongoing Support

- [ ] Integrate the employee into company culture with team-building events and company initiatives
- [ ] Conduct a 30-60-90 review to discuss goals and progress
- [ ] Continue 1:1s for personalized feedback on performance, goals, and overall well-being
- [ ] Offer additional training resources if needed
- [ ] Ask employee for onboarding feedback to continue improving the onboarding process



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