

Onboarding Checklist Template

PRE-ONBOARDING: BEFORE THE FIRST DAY

- ☐ Send Offer Letter & Employment Contract
- ☐ Prepare New Hire Paperwork
- ☐ Set Up Workstation & Tools
- ☐ Create Email Account & System Access
- ☐ Announce New Hire to the Team
- ☐ Assign a Buddy or Mentor

DAY 1: ORIENTATION & WELCOME

- ☐ Welcome Introduction
- ☐ Office Tour (If In-Person)
- ☐ Provide Company Swag or Welcome Kit
- ☐ Review the Employee Handbook
- ☐ IT Setup & System Logins
- ☐ Review Job Role & Responsibilities

WEEK 1: SETTING THE FOUNDATION

- ☐ Team Introductions
- ☐ Training Schedule
- ☐ Set Initial Goals
- ☐ Compliance Training
- ☐ Review Employee Benefits
- ☐ First Check-In Meeting

FIRST 30 DAYS: SETTLING IN

- ☐ Ongoing Training
- ☐ Team Collaboration
- ☐ Manager Check-Ins
- ☐ Review Performance Expectations
- ☐ Schedule 30-Day Review Meeting

FIRST 60-90 DAYS: FULL INTEGRATION

- ☐ Provide Additional Training
- ☐ Conduct 60-Day Check-In
- ☐ Incorporate into Major Projects
- ☐ Seek Feedback
- ☐ 90-Day Performance Review

ONGOING SUPPORT & DEVELOPMENT

- ☐ Continue Regular Check-Ins
- ☐ Set Long-Term Development Goals