



Onboarding checklist

Onboarding is your chance to set up a long-term success plan for your new employees.

This checklist will guide you through each essential step to help fresh talent get off to a great start.

- ☐ Prepare the workstation or virtual setup (computer, software, login credentials).
- ☐ Send a welcome email with first-day instructions and contact details.
- ☐ Set up the employee in the HR system (payroll, benefits, personal information).
- ☐ Ensure all necessary forms (tax forms, direct deposit, NDAs) are completed.
- ☐ Assign a mentor or buddy to the new hire.
- ☐ Schedule an orientation session to introduce company culture and values.
- ☐ Provide an overview of the company's structure and key teams.
- ☐ Set up meetings with key team members and stakeholders.
- ☐ Review the new hire's job description and performance expectations.
- ☐ Provide access to the employee handbook and other relevant documentation.
- ☐ Introduce the new hire to the company's communication tools (email, Slack, project management software).
- ☐ Review company policies and procedures (attendance, dress code, code of conduct).
- ☐ Set up training sessions for necessary tools and systems.
- ☐ Outline the first week's schedule, including meetings, training, and breaks.
- ☐ Plan regular check-ins during the first week to address any questions or concerns.
- ☐ Assign the first project or task to help the new hire get started.
- ☐ Review health and safety protocols (for in-office roles).
- ☐ Ensure the new hire understands the company's mission, vision, and goals.
- ☐ Set up a 30-day, 60-day, and 90-day review process to track progress.
- ☐ Gather feedback from the new hire on the onboarding experience.