

Onboarding Checklist Template

First Day

- **Welcome!** Meet and greet the employee to the rest of the staff, a coffee break in the kitchen or large meeting room can be best.
- **Welcome package.** A personalized letter from the CEO, employee contract, employee forms, [employee handbook](#), on-boarding plan overview, general information (parking, lunch options, [dress code](#), etc.)
- **Desk setup.** The station or desk of the new hire should be complete with office supplies (stapler, pencils, pens, paper, etc.), chair, laptop, and phone. Make sure IT set the laptop up and the software needed has been downloaded and all access information has been written down. Set up a time for the new hire to meet with IT to go over security.
- **HR meeting.** Meet with HR to fill in all necessary forms, go over the [code of conduct](#), explain company policies (sexual harassment, bullying, tardiness, absences, etc.), and to discuss procedures.
- **Meet with CEO.** Talk about how the company was founded, what the mission statement is, what the company goals are, and to showcase how the new hire fits in.
- **Meet with direct manager.** Go over hierarchy, relay the job description and responsibilities, set goals for the first 6 months, explain expectations and ask for new hire's expectations, and discuss the new hire's career development path.
- **Give them a buddy/mentor.** Pair up the new hire with a seasoned employee so they always have someone to lean on. They can eat lunch with their buddy, their buddy can introduce them to other employees and should frequently check in to make sure everything is okay. The new hire can ask their buddy any "stupid questions".

First Week

- **Daily check in.** A daily check in helps clear up confusion and ensures the new hire is on the right track. Ask questions and let the new hire ask you questions as well, keep the balance.

- **Schedule introductions with different departments.** Set up a time for the new hire to meet with each department.
- **Schedule training.** Go through what training is needed and when it is to be finished, what readings should be completed and what exercises should be done. Ask the new hire if they need or want any kind of special training.
- **Set up a social hour.** Whether it's lunch, a happy hour, [a team building exercise](#), or a company outing, schedule one! This will help to set a fun tone and will help the hire fit into the company culture.

First, Third and Sixth Month

- **On-boarding survey.** Send a survey to see where the new hire stands, ask them how things are going and where they need help. Find out what they think about the on-boarding process so far.
- **Employee progress review.** Schedule a one-on-one to discuss the employee's progress, what their strengths and weaknesses are, if the goals have changed, and so on.
- **Schedule relevant training.** If the new hire requires additional training, schedule it. Ask them if they want certain training to help them be the best at their job.
- **Create social events.** Social events helps the employee feel more connected to the company and fellow co-workers.