



# THE COMPLETE ONBOARDING CHECKLIST

ACTION STEPS TO SET NEW HIRES UP FOR SUCCESS

Employee onboarding is an important function as part of the hiring and training process, but it's one that's often overlooked. Getting the onboarding process right means your new hires are better equipped to handle their responsibilities, more in sync with the company culture, and less likely to make mistakes during the first few weeks and months on the job. Use this interactive checklist to ensure that you're completing all the essential onboarding steps to set your new employees up for success.

## — Before the New Hire Start Date: Action Steps

- Call to Confirm:**  
A day or two prior to the new hire's start date, contact them by phone to confirm their expected arrival time, office hours, company dress code (if applicable), and expectations for the first day.
- Address Any Accommodations Needed:**  
If your new hire requires accommodations for a disability, ensure that all necessary accommodations are in place and readily accessible prior to the first day of employment.
- Prepare Information Packet:**  
New hires should be provided with a packet of information on or before their first day of employment, including the employee handbook, organizational charts, the job description for their role, and information about other departments, roles, and key contacts.
- Prepare a Learning and Development Plan:**  
New hires typically have a lot of information to learn before they're fully prepared to handle their role independently. Outline all the courses, specific training tasks, and other educational needs that need to be addressed during the first week or two of employment.
- Prepare the Employee's Workstation:**  
If your new hire will be working in an exclusive area, prep their space before their first day. Clean up any unnecessary items and ensure that an appropriate desk, chair, computer, and essential desk supplies such as pens, a stapler, notepad, and other necessities are in place.
- Set up IT Requirements:**  
Work with the IT department to have an email address configured, as well as accounts setup and credentials provided for the new hire to access any information systems they'll need to utilize.
- Request Company Devices:**  
If your company provides employees with mobile devices, such as smartphones or tablets, arrange for these to be available on the first day of employment.

- Obtain a Temporary Security Badge:**  
If your company requires security badges to access the building, arrange for a temporary security badge for the transition period.
- Communicate with Existing Staff:**  
Send a memo to existing staff to make them aware of the new hire, their starting date, and other relevant information.
- Confirm Expectations with Existing Staff:**  
If your new hire will need to interface or train with existing team members during the onboarding process, confirm these tasks with the individuals responsible for them and all relevant expectations.
- Secure Onboarding Space and Necessary Equipment:**  
Reserve a conference room or other space as needed for onboarding and training purposes. Line up any audio-visual equipment or other necessary items for training and onboarding.
- Add New Hire to All Applicable Distribution Lists:**  
If your company uses internal distribution lists to distribute memos via email or other communications, arrange for the new hire to be added to all applicable distribution lists.

## — On the First Day of Employment: Action Steps

- Provide a Company Tour:**  
Give your new hire a tour of the company, making introductions to team members and management representatives.
- Take Photo for Security Badge/Employee ID:**  
Arrange for a photo to be taken for the new hire's employee identification card. Fill out any necessary request forms to request the badge or ID card.
- Assign a Mentor or Onboarding Buddy:**  
Assigning an experienced team member to serve as a mentor or onboarding buddy helps to ensure that your new hire has a go-to resource for questions and concerns and is equipped to quickly learn their day-to-day responsibilities.
- Review Their Schedule:**  
Go over the onboarding and training schedule for the week, including specific training sessions, any job shadowing they'll be doing with individual team members, meetings they'll be attending, and other events.
- Review Their Role and Relationships:**  
Go over the employee's role in the company and how it contributes to the organization's overarching goals. Discuss how their role interfaces with other team members and how their department collaborates with other departments within the organization.

- Discuss Important Policies and Procedures:**

Review in detail all the policies and procedures that will impact the employee's day-to-day routine. Policies such as lunch breaks and other periodic breaks throughout the day, company security policies, requests for PTO and sick time, overtime compensation, and other policies should be discussed. Review procedures such as submitting time sheets or expense reports for travel and expense reimbursement, if applicable. Additionally, provide copies of all company security policies and discuss to ensure that your new hire understands the policies and procedures for using the internet, appropriate use of company devices, and so forth. Don't forget to review emergency procedures.
- Review IT Procedures and Access:**

Ensure that the new hire's login credentials are functional for all systems they need to access and that they are granted access to the functions and processes necessary to perform their job duties.
- Welcome Lunch:**

You may opt to take a new hire on a welcome lunch with a few key team members. This fosters camaraderie and helps new hires feel more comfortable approaching other team members with questions and for assistance as needed during the first few weeks of employment.

## — On the First Week of Employment: Action Steps

- Verify Completed Paperwork:**

Check with your HR department to ensure that all new hire paperwork has been completed and submitted.
- Review Initial Projects and Workflows:**

If your new hire is responsible for specific tasks or independent projects, review these expectations for the next month and establish periodic check-in dates to evaluate progress. Establish goals and milestones for the next 30 days.
- Review Progress Reporting Requirements:**

Review procedures for reporting on completed work, work-in-progress, and other tasks that should be communicated on a daily, weekly, or monthly basis.
- Arrange One-on-One Meetings with Key Team Members:**

If your employee will be interacting regularly or reporting to other team members or managers other than yourself, set up one-on-one meetings with these individuals throughout the first week. This establishes clear lines of communication and enables other team members to communicate their expectations to ensure a smooth working relationship.

## — First Three Months and Beyond: Action Steps

- Provide Feedback:**  
Provide clear and actionable feedback on your new hire's performance and address any concerns.
- Solicit Feedback:**  
Solicit feedback from your new hire to gauge job satisfaction and any areas in which the employee feels they need more training. Encourage them to share any ideas they have on improving processes and workflows.
- Solicit Feedback from Team Members:**  
It's also helpful to solicit feedback from team members who have worked with the new hire throughout the first few months of employment. This can be helpful in identifying training gaps and specific areas for improvement.
- Address Training and Information Gaps:**  
If any gaps in knowledge or skill are identified through the feedback process, create a plan for implementing further training or other steps to close those gaps. Set up a follow-up evaluation in 90 days.
- Set Goals and Milestones for the First Year:**  
After a new hire is acclimated with their new role, responsibilities, and the company culture, it's a good time to set expectations for their full first year. Establish individual goals and objectives, and schedule check-in points and meetings weekly, monthly, or bi-monthly, as appropriate.

These action steps can be customized and modified to meet the specific needs and requirements of your organization, but the steps provided here provide a solid foundation for onboarding a new hire across many industries. Whether you use this checklist as-is or customize it, following a clear, action-oriented sequence of steps will help to ensure that your new hires are provided with a foundation for a successful career with your organization.