

Onboarding Template

Onboarding Step	Description	Responsible Party	Completed
Preboarding Stage	Obtain signed job acceptance and confirm start date.		<input type="checkbox"/>
	Send new employee welcome email with essential details (start date, time, location, etc.).		<input type="checkbox"/>
	Complete new-hire paperwork, including compliance forms, tax forms (W-4), employment contracts, and benefits documentation.		<input type="checkbox"/>
	Provide introductory materials to familiarize the new hire with the company (e.g., company overview, team introductions, mission, and values).		<input type="checkbox"/>
	Prepare welcome package for new hire, including branded items and useful materials.		<input type="checkbox"/>
Pre-Hire Preparation	Set up workstation (desk, chair, computer, phone, necessary software access).		<input type="checkbox"/>
	Procure devices and equipment (computer, phone, access to shared devices, additional job-specific devices).		<input type="checkbox"/>

	Set up accounts, create logins, and ensure access to job-specific technology (CRM, project management tools).		<input type="checkbox"/>
	Set up workspace with necessary office furniture, supplies, and a branded welcome kit.		<input type="checkbox"/>
	Schedule orientation meetings and training sessions.		<input type="checkbox"/>
First Day Essentials	Greet the new hire and provide a facility tour (office/worksite or virtual).		<input type="checkbox"/>
	Introduce new hire to the team, executives, and key stakeholders.		<input type="checkbox"/>
	Provide card, badge, or other security assets to the new hire.		<input type="checkbox"/>
	Send new hire announcement to the team and schedule a team lunch or informal introduction.		<input type="checkbox"/>
	Provide an overview of company policies, code of conduct, culture, and benefits.		<input type="checkbox"/>
	Complete additional HR paperwork (I-9, direct deposit setup, etc.).		<input type="checkbox"/>
	Assign a buddy/mentor to help the new hire navigate the first week.		<input type="checkbox"/>

	Provide a high-level overview of job duties and expectations.		<input type="checkbox"/>
Training & Orientation	Conduct HR orientation to cover key policies (anti-harassment, safety protocols, attendance policies).		<input type="checkbox"/>
	Set up IT training (overview of systems, logins, company software, and tools).		<input type="checkbox"/>
	Provide training schedule and materials relevant to the new hire's role.		<input type="checkbox"/>
	Review job duties, expectations, and initial goals with the manager.		<input type="checkbox"/>
First Week Tasks	Check in daily to ensure new hire is comfortable and has access to needed resources.		<input type="checkbox"/>
	Assign small, meaningful tasks to help the new hire get familiar with their role.		<input type="checkbox"/>
	Schedule meetings with cross-functional teams to provide context on how the new hire's role fits into the broader organization.		<input type="checkbox"/>
	Provide an overview of ongoing projects relevant to their role.		<input type="checkbox"/>

	Complete benefits enrollment and payroll setup.		<input type="checkbox"/>
	Review the employee handbook, safety policies, and technology policies.		<input type="checkbox"/>
	Obtain onboarding feedback to understand areas of improvement.		<input type="checkbox"/>
Company Culture & Integration	Introduce new hire to the organization's mission, vision, and values, and explain how their role supports these goals.		<input type="checkbox"/>
	Reinforce company culture by sharing examples of how values are demonstrated in daily work.		<input type="checkbox"/>
IT and Security	Review data protection policies and conduct security training.		<input type="checkbox"/>
	Ensure hardware and software are properly set up and secured.		<input type="checkbox"/>
First Month Follow-Up	Schedule weekly one-on-one meetings with the manager to discuss the new hire's experiences, challenges, and feedback.		<input type="checkbox"/>
	Train the new hire on more advanced job duties and provide additional work assignments.		<input type="checkbox"/>

	Review initial performance goals and adjust if needed.		<input type="checkbox"/>
	Solicit feedback on the onboarding process to identify opportunities for improvement.		<input type="checkbox"/>
On-the-Job Training	Provide on-the-job training and certifications as needed, extending through the first six months where applicable.		<input type="checkbox"/>
60-Day Review	Meet with the new hire to review progress on initial goals, provide constructive feedback, and recognize achievements.		<input type="checkbox"/>
	Ensure that training milestones have been met and that any additional support is provided.		<input type="checkbox"/>
90-Day Assessment	Conduct a formal review to evaluate performance, discuss long-term goals, and identify further training or development needs.		<input type="checkbox"/>
	Collect feedback from both the new hire and their manager on the onboarding experience.		<input type="checkbox"/>
Ongoing Check-Ins	Schedule 30, 60, and 90-day reviews to ensure consistent progress tracking and support.		<input type="checkbox"/>
	Assign a mentor or buddy to continue providing guidance throughout the onboarding period.		<input type="checkbox"/>

Remote Worker Adjustments	Ensure virtual tours and onboarding materials are tailored for remote workers. Invite remote hires to visit the office when possible to foster engagement.		<input type="checkbox"/>
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Key Points to Remember:

- **Communication is Key:** Keep communication open throughout the onboarding period to ensure the new hire feels supported and comfortable.
- **Buddy System:** Assigning a peer mentor helps new hires integrate into the company culture more smoothly and accelerates their learning process.
- **Regular Check-Ins:** Early and frequent check-ins prevent small challenges from becoming larger issues and reinforce the company’s commitment to new hire success.
- **Gather Feedback:** Consistently collect feedback from new hires on the onboarding process to improve and adapt the experience for future employees.