Onboarding checklist

This onboarding checklist is divided into three stages: preboarding, training, and follow-through. The onboarding process should begin at least one week prior to an employee's official start date.

Preboarding stage

- [ ] Collect signed offer letter
- [ ] Confirm start date
- [ ] Send welcome communication to the employee's email
- [ ] Assemble new hire paperwork
  - [ ] Tax forms
  - [ ] Employment contract
  - [ ] Legal documents — including non-disclosure and non-compete forms
  - [ ] Employee handbook
  - [ ] Benefits information and forms
- [ ] Gather equipment
  - [ ] Computer or laptop
  - [ ] Mouse and keyboard — if necessary
  - [ ] Power cord
- [ ] Create company accounts
  - [ ] Email
  - [ ] Time card system
  - [ ] CRM and other project management systems
- [ ] Reserve office or workspace
- [ ] Gather and assemble desk and chair
- [ ] Add new employee to organizational email and mailing lists
- [ ] Announce new hire through an all-company email

Training stage

- [ ] Provide new employee with security clearance
- [ ] Introduce managers and team members
- [ ] Give facility tour
- [ ] Set up a training plan with employee
- [ ] Complete new hire paperwork
- [ ] Review employee handbook
- [ ] Update the employee on safety policies
- [ ] Assign mentorship — if applicable
- [ ] Answer benefits and training questions
- [ ] Schedule team lunch or meet-and-greet

Follow-through stage

- [ ] Check in with new employee consistently
  - [ ] After one week
  - [ ] After one month
  - [ ] After two months
  - [ ] After three months
  - [ ] After trial period
- [ ] Conduct an onboarding survey — if applicable
- [ ] Provide access to professional development training

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