



# New Hire Onboarding Checklist

This list is not meant to be an exhaustive collection of onboarding components, nor will you need to complete each checklist item for every new hire. Check it out and see what works for you and your org! Remember: Start small, see what works, and then do more of that. Incremental changes work best to create an excellent onboarding experience that is both sustainable and scalable. Remember, new hires want four things: seamless logistics, support from great managers, to build connections, and to feel understood. How you will do that depends on you, your new hire, and your organization's culture.

## Preboarding

- ✓ Establish expectations for handoff from recruiting to HR / manager
- ✓ Welcome message from direct manager
- ✓ Welcome message from teammates
- ✓ Information about Day 1 logistics:

- Where to be and when
- Who to expect communications from
- What will be done prior to Day 1
- Week 1 schedule (build in breaks!)

- ✓ New hire paperwork to be completed prior to Day 1:

- Personal information (biographical, mailing address, pronouns, preferred name, emergency contact, shirt size, etc.)
- Work authorization forms
- Tax and pay forms
- Non-disclosure / other agreements
- New employee bio + photo

- ✓ Send other optional information packets:

- Benefits and perks
- Remote work information

- ✓ Provide IT equipment, instructions and contact info

## Logistics

- ✓ Provide manager onboarding toolkit and training, as needed
- ✓ Invitations to various orientations:

- IT orientation
- HR orientation
- Benefits info session
- Culture orientation
- Meet and greet with leadership
- Functional / departmental orientation
- New manager onboarding

- ✓ Set up a physical workspace, if applicable
- ✓ Invitations to necessary 1:1s and introductory calls

- Recurring manager 1:1s
- Intros with teammates
- Intros with cross-functional partners

- ✓ Set up team lunches and/or socials
- ✓ Add new hire to applicable team meetings
- ✓ Add new hire to all hands and other company-wide events + meetings
- ✓ Assign new hire onboarding "buddy"
- ✓ Enroll new hire in applicable training sessions and e-learning modules

## Onboarding

### ✓ Set up centralized new hire resource bank (online):

- Provide names for 1:1s with person's location, role and context around each meeting
- Provide links to commonly used systems and instructions on how to access
- Provide contact info for key partners and helplines (i.e. IT, benefits team, etc.)

### ✓ Send swag pack or personalized welcome message

### ✓ Set up IT equipment

- Gather equipment preferences from new hire and requirements from manager
- Proactively download needed software
- Grant access necessary systems
- Order peripherals or home office components
- Confirm mailing address and ship in time for Day 1, if applicable

### ✓ Create Connections

- Remind team of onboarding roles and responsibilities
  - Using video for meetings
  - Creating space for personal connection in meetings (ice breakers, games)
  - Solicit suggestions from the team and have them help
- Introduce new hire to onboarding "buddy" (warm hand off)
- Set up team / company social time
  - Coffee chats
  - Team lunches
  - Happy hours
  - Themed events (i.e. paint night, cooking class)
  - New hire social
  - Virtual "get to know you" portal

### ✓ Show Care and Understanding

- Tell them you're excited they're on the team
- Ask them how they're feeling, often
- Tell them thank you
- Provide positive feedback

### ✓ Creating Clarity

- Outline of onboarding process
- Set feedback loop for onboarding process
- Ask how onboarding is going, often
  - Do you need to speed up or slow down?
  - What are the gaps thus far?
  - What's going well?

### ✓ Setting Expectations

- Outline of roles and responsibilities
- Written job aides and SOPs
- Goals for first 30 / 60 / 90 / 180 days
- Set regular feedback loop for performance
- Outline how new hires will contribute to the company's vision

Ready to build more human connection into your onboarding? [Schedule a free demo!](#)

Provided by Kate Pavlina | Please credit when distributing | [kate.pavlina@gmail.com](mailto:kate.pavlina@gmail.com) | [www.katepavlina.com](http://www.katepavlina.com)