EMPLOYEE ONBOARDING ESSENTIALS CHECKLIST

Bringing a new employee on board? A smooth onboarding process sets them up for success and helps them feel welcome. Use this checklist to cover all the essentials.

BEFORE THEIR FIRST DAY

- ○ Prepare their employment contract and paperwork.
- ○ Set up email, software access, and any necessary accounts.
- ○ Arrange their workspace (desk, chair, computer, phone, etc.).
- ○ Send a welcome email with key details about their start date and what to expect.

ON THEIR FIRST DAY

- ○ Make them feel at home and be sure to introduce them to the team.
- ○ Provide a company overview: mission, values, and culture.
- ○ Go over their role, responsibilities, and expectations.
- ○ Set up their devices and make sure they have access to everything they need.
- ○ Walk them through important policies (HR, IT, security, etc.).

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DURING THEIR FIRST WEEK

- [ ] Schedule one-on-one meetings with key team members.
- [ ] Provide training on tools, systems, and procedures.
- [ ] Set any short-term goals and expectations. Be clear!
- [ ] Encourage questions and feedback.
- [ ] Check in to see how they're doing

AFTER THE FIRST MONTH

- [ ] Have a formal check-in to review progress and answer any concerns.
- [ ] Gather feedback on their onboarding experience.
- [ ] Discuss long-term goals and career development opportunities.
- [ ] Make sure they feel supported and are integrating well into the team.

Help your new staff hit the ground running, by giving them everything they need to succeed.