



## WELCOME EMAIL

# Onboarding Checklist

- ☐ Warmly welcome them to the team  
-----
- ☐ Include the starting date, time and location  
-----
- ☐ Provide the phone number and email of their contact person  
-----
- ☐ Define where the new employee's workstation will be  
-----
- ☐ Provide a list of documents they should bring  
-----
- ☐ Include a scheduled breakdown of their first day  
-----
- ☐ Attach any company informational documents  
-----
- ☐ Send them a link/copy of the employee handbook  
-----



***PRELIMINARY***

# ***Onboarding Checklist***

- ☐ Send out a company-wide email announcing the new hire, with their name and position  
-----
- ☐ Announce their start date, and which office they will be working from  
-----
- ☐ Make sure that the head of their department is prepared for the new arrival  
-----
- ☐ Define where the new employee's workstation will be  
-----
- ☐ Order all necessary equipment and stationary  
-----
- ☐ Create all their accounts in the HR System  
-----
- ☐ Prepare HR Related Documents; Payroll, Social Security, Benefits  
-----
- ☐ Create accounts, email, and other accounts needed for the new employee  
-----
- ☐ Send out a new hire welcome package/email that includes the forms and documents new hires must complete  
-----
- ☐ Schedule your new hire's first day meetings, prioritizing intro calls with colleagues who will work closely with the new hire.  
-----

# ***Onboarding Checklist***

☐ Welcome your new employee to the team, and greet the employee at the door

-----

☐ Introduce the new employee to their colleagues and department

-----

☐ Show the new employee their workstation

-----

☐ Give them the grand tour. Show them the essentials; Entrances, Exits, Restrooms, Kitchen, Common Rooms

-----

☐ Introduce the employees onboarding buddy/mentor (should there be any)

-----

☐ Ensure they can log into their station and all their equipment is working properly

-----

☐ Share essential company policies (e.g., hours of operation, dress code, parking, etc.)

-----

☐ Confirm that all credentials and accesses work

-----

☐ Set up a welcome lunch/meal with the new employee and their team (if possible)

-----

☐ If possible, have a one to one meeting at the end of the day

-----

# ***Onboarding Checklist***

- ☐ Set up a one to one meeting at the end of the week  
-----
- ☐ Check that the employee has had meetings with the department head, and all key people in their role  
-----
- ☐ Check that their equipment and software needs have been met (if required)  
-----
- ☐ Add employee to the birthday list (if required)  
-----
- ☐ Check that short term goals have been set  
-----
- ☐ Provide information about workplace safety and emergency procedures.  
-----
- ☐ Explain the process for requesting time off and reporting absences.  
-----
- ☐ Discuss upcoming projects, tasks, and goals  
-----
- ☐ Provide feedback on their performance and progress during the first week  
-----
- ☐ Plan additional training if needed  
-----

# ***Onboarding Checklist***

- 
- ☐ Create and send a first month onboarding survey  
-----
  - ☐ Set a meeting with the departments head about the employee progress  
-----
  - ☐ Set up a one to one meet with the employee at the end of the month  
-----
  - ☐ Review Key Performance Indicators and if they have accomplished their short term goals  
-----
  - ☐ Check the employees feelings and perceptions about the job  
-----
  - ☐ Go over any observations and feedback from the new employee  
-----
  - ☐ Invite then new members to participate in activities for team members  
-----
  - ☐ Get feedback from the onboarding mentor/buddy on the progress and relationship with the new hire  
-----
  - ☐ Plan and schedule a three month and six month survey for the employee  
-----

# FOLLOW US

IF YOU FOUND THIS  
CONTENT USEFUL!

LIKE



COMMENT



SAVE



SHARE



**@outstanding\_solutions**