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| **Onboarding Step** | **Description** | **Completed (Yes/No)** |
| **Preboarding Stage** | Obtain signed job acceptance and confirm start date. |  |
|  | Send new employee welcome email with essential details (start date, time, location, etc.). |  |
|  | Complete new-hire paperwork, including compliance forms, tax forms (W-4), employment contract, and benefits documentation. |  |
|  | Provide introductory materials to familiarize the new hire with the company (e.g., company overview, team introductions, mission, and values). |  |
|  | Prepare welcome package for new hire, including branded items and useful materials. |  |
| **Pre-Hire Preparation** | Set up workstation (desk, chair, computer, phone, necessary software access). |  |
|  | Procure devices and equipment (computer, phone, access to shared devices, additional job-specific devices). |  |
|  | Set up accounts, create logins, and ensure access to job-specific technology (CRM, project management tools). |  |
|  | Set up workspace with necessary office furniture, supplies, and a branded welcome kit. |  |
|  | Schedule orientation meetings and training sessions. |  |
| **First Day Essentials** | Greet the new hire and provide a facility tour (office/worksite or virtual). |  |
|  | Introduce new hire to the team, executives, and key stakeholders. |  |
|  | Provide card, badge, or other security assets to the new hire. |  |
|  | Send new hire announcement to the team and schedule a team lunch or informal introduction. |  |
|  | Provide an overview of company policies, code of conduct, culture, and benefits. |  |
|  | Complete additional HR paperwork (I-9, direct deposit setup, etc.). |  |
|  | Assign a buddy/mentor to help the new hire navigate the first week. |  |
|  | Provide a high-level overview of job duties and expectations. |  |
| **Training & Orientation** | Conduct HR orientation to cover key policies (anti-harassment, safety protocols, attendance policies). |  |
|  | Set up IT training (overview of systems, logins, company software, and tools). |  |
|  | Provide training schedule and materials relevant to the new hire’s role. |  |
|  | Review job duties, expectations, and initial goals with the manager. |  |
| **First Week Tasks** | Check in daily to ensure new hire is comfortable and has access to needed resources. |  |
|  | Assign small, meaningful tasks to help the new hire get familiar with their role. |  |
|  | Schedule meetings with cross-functional teams to provide context on how the new hire’s role fits into the broader organization. |  |
|  | Provide an overview of ongoing projects relevant to their role. |  |
|  | Complete benefits enrollment and payroll setup. |  |
|  | Review the employee handbook, safety policies, and technology policies. |  |
|  | Obtain onboarding feedback to understand areas of improvement. |  |
| **Company Culture & Integration** | Introduce new hire to the organization’s mission, vision, and values, and explain how their role supports these goals. |  |
|  | Reinforce company culture by sharing examples of how values are demonstrated in daily work. |  |
| **IT and Security** | Review data protection policies and conduct security training. |  |
|  | Ensure hardware and software are properly set up and secured. |  |
| **First Month Follow-Up** | Schedule weekly one-on-one meetings with the manager to discuss the new hire’s experiences, challenges, and feedback. |  |
|  | Train the new hire on more advanced job duties and provide additional work assignments. |  |
|  | Review initial performance goals and adjust if needed. |  |
|  | Solicit feedback on the onboarding process to identify opportunities for improvement. |  |
| **On-the-Job Training** | Provide on-the-job training and certifications as needed, extending through the first six months where applicable. |  |
| **60-Day Review** | Meet with the new hire to review progress on initial goals, provide constructive feedback, and recognize achievements. |  |
|  | Ensure that training milestones have been met and that any additional support is provided. |  |
| **90-Day Assessment** | Conduct a formal review to evaluate performance, discuss long-term goals, and identify further training or development needs. |  |
|  | Collect feedback from both the new hire and their manager on the onboarding experience. |  |
| **Ongoing Check-Ins** | Schedule 30, 60, and 90-day reviews to ensure consistent progress tracking and support. |  |
|  | Assign a mentor or buddy to continue providing guidance throughout the onboarding period. |  |
| **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. |  |

**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.