

Employee Onboarding Checklist

Use this checklist to streamline your onboarding process and create a consistent, positive experience for every new hire.

1. Pre-onboarding preparation

Prepare for your new hire before their first day to ensure a smooth transition:

- Send a **welcome email** with logistical details (e.g. office hours, **dress code**).
- Share key resources like the **employee handbook** and training documents.
- Transfer new hire paperwork (such as employment contract, benefits documents, employee handbook, I-9s, W-9s, and relevant tax forms).
- Name a mentor to work with the new employee while they navigate the onboarding process.
- Set up their workspace with the necessary tools and accounts.
- Inform your existing team about the new hire's first day via a company-wide announcement.

2. Day one essentials

Welcome your new hire and provide the support they need on their first day:

- Conduct an office tour and introduce them to team members.
- Provide an onboarding schedule outlining key steps and timelines.
- Welcome your new hire with a meeting to review goals and company culture.
- Go through in-office training modules and materials.
- Link your new worker to their job mentor and encourage questions.
- Schedule a lunch to welcome your new worker and kick off team bonding.

3. Week one priorities

Help your new hire settle in and start building momentum during their first week:

- Schedule check-ins to address questions and ensure smooth progress.
- Assign ongoing training modules to build skills.
- Gather feedback on their onboarding experience for future improvement.
- Ask the employee's mentor how well the new hire is acclimating to their role.

4. First-month priorities

Ensure your new hire is meeting goals and feeling confident by the end of their first month:

- Discuss performance goals and identify areas for additional training.
- Introduce new job duties and relevant training processes.
- Tap into their mentor's insights to see how well your new hire is advancing.
- Give detailed feedback on any areas of improvement.
- Hold weekly check-ins to track progress and set expectations for the next 60–90 days.

5. Ongoing support

Continue to invest in your new hire's growth and integration with the team:

- Schedule regular performance reviews and offer constructive feedback.
- If performance reviews are positive, consider adding new responsibilities to job roles.
- Provide skill development opportunities and career growth discussions.
- Ensure continuous engagement through team-building activities.
- Discuss the worker's long-term goals and possible opportunities within the company.

Wize Words

This checklist can be customized to fit the unique needs of your organization and each role. Regularly reviewing and improving your onboarding process ensures your new hires feel valued and supported, boosting retention and productivity.



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