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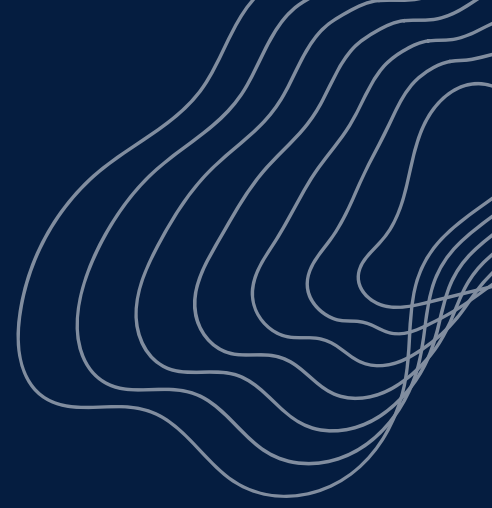# EMPLOYEE ONBOARDING CHECKLIST✓

A step-by-step guide to deliver structured, engaging, and compliant onboarding experiences.

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Introduction
Why Effective Onboarding Matters?

An effective onboarding process helps new employees adapt quickly, engage deeply, and perform confidently. This checklist serves as a comprehensive roadmap to ensure new hires experience a smooth transition from recruitment to full productivity.

Designed for HR professionals, Learning & Development (L&D) teams, and managers who aim to deliver consistent and impactful onboarding experiences across all departments.

Disclaimer:
The information provided in this eBook is intended for educational purposes and general guidance only.

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Pre-Boarding

→ Prepare logistics, communication, and tools ahead of time to create a professional and welcoming first impression.

List of checklist items

☐ **Offer confirmed & welcome email sent**

Send a warm welcome email confirming start date, time, and what to expect.

☐ **IT access & equipment prepared**

Set up all required accounts, devices, and tools so the new hire can log in immediately.

☐ **Manager welcome touchpoint scheduled**

Arrange a short call or message from the manager to build early connection and clarity.

☐ **Employment paperwork completed**

Ensure all contracts, tax forms, and payroll details are submitted and approved.

☐ **Pre-boarding learning shared**

Provide short culture or orientation videos so the new hire arrives informed and confident.

☐ **Onboaring buddy assigned**

Pair the new hire with a peer who can answer everyday questions and guide them socially.

☐ **Welcome kit prepared and ready**

Organize a physical or digital welcome kit to create a positive first impression.

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The Week Before Start

→ Build excitement and ensure all details are finalized before the employee's first day. Include a welcome message or short video from the leadership team to make the new hire feel valued.

List of checklist items

☐ **Team introduction email shared**

Notify the team about the new hire, their role, and start date to spark early connection.

☐ **Access to tools verified**

Test email, communication apps, and LMS access to ensure everything works on day one.

☐ **First-week calendar scheduled**

Send invites for orientation, training, and key meetings to give structure and clarity.

☐ **Workspace or remote setup confirmed**

Check that the physical desk or remote setup is ready and suitable for productive work.

☐ **Start-date confirmation email sent**

Send a concise email with start time, location or link, dress code, and first-day agenda.

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Day One

→ Deliver a memorable and stress-free first day that focuses on introductions, orientation, and connection. Keep the first day simple and interactive—focus on relationships rather than paperwork.

List of checklist items

☐ **Welcome greeting & intro meeting**

HR or the manager greets the new hire, sets the tone, and walks through the plan for the day.

☐ **IT access confirmed & issues resolved**

Log in to all key systems and fix any access or technical problems on the spot.

☐ **Company orientation session**

Introduce the mission, values, and culture so the new hire understands the bigger picture.

☐ **Office or virtual workspace tour**

Show where and how work happens, including key spaces, tools, and communication channels.

☐ **Team introductions & buddy connection**

Present the core team and ensure the new hire meets their buddy for day-to-day support.

☐ **End-of-day check-in conversation**

Review how the day went, answer questions, and preview what will happen on day two.

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First Week

→ Help the employee understand their role, connect with the team, and begin structured learning. Encourage feedback on the onboarding experience to identify early opportunities for improvement.

List of checklist items

☐ Department introductions completed

Ensure the new hire meets key people they'll work with and understands each team's role.

☐ Daily manager check-ins scheduled

Set short touchpoints with the manager to support questions, clarity, and prioritization.

☐ Role overview & first tasks assigned

Clarify responsibilities and give simple starter tasks to build confidence and momentum.

☐ 30/60/90-day plan introduced

Share a clear roadmap of goals and expectations for the first three months.

☐ Training modules assigned & monitored

Assign essential learning in the LMS and track progress toward completion.

☐ End-of-week reflection conversation

Review highlights, challenges, and questions from week one to fine-tune support.

First 30 Days

→ Reinforce engagement and build confidence through meaningful work and ongoing support. Provide access to peer learning groups or discussion channels for better integration.

List of checklist items

☐ Performance expectations documented & reviewed

Agree on clear goals, success measures, and priorities for the role.

☐ 30-day check-in with HR and manager

Discuss progress, support needs, and overall onboarding experience so far.

☐ Compliance and safety training completed

Confirm all mandatory policies, regulations, and safety modules are finished.

☐ Cross-functional introductions completed

Connect the new hire with key teams and stakeholders they'll collaborate with.

☐ Early achievements recognized and shared

Highlight initial wins to build confidence and reinforce positive performance.

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60–90 Days

→ Focus on development, autonomy, and performance alignment. Encourage participation in internal projects or knowledge-sharing sessions.

List of checklist items

☐ 60-day progress review completed

Assess how the new hire is performing against expectations and identify any support needed.

☐ 90-day performance review conducted

Formally review results from the first three months and confirm fit, strengths, and focus areas.

☐ Development and growth plan defined

Agree on key skills, learning activities, and experiences to support ongoing development.

☐ Goals updated for the next quarter

Refresh objectives based on current performance, priorities, and business needs.

☐ Onboarding feedback survey completed

Collect structured feedback on the onboarding journey to improve future new-hire experiences.

Six Months

→ Assess long-term engagement, performance, and cultural fit. Host a one-on-one "stay conversation" to reinforce commitment and gather ideas for improvement.

List of checklist items

☐ Mid-year performance review conducted

Hold a structured discussion on performance, impact, and areas for continued growth.

☐ Recognition or reward for contributions shared

Acknowledge key achievements publicly or privately to reinforce motivation and engagement.

☐ Individual development plan progress reviewed

Check progress on agreed learning goals and adjust actions or resources as needed.

☐ Career progression discussion scheduled

Plan a conversation about future roles, opportunities, and the path to get there.

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One Year

→ Celebrate milestones and transition onboarding into ongoing development. Use the one-year mark to feature the employee's success story in internal newsletters.

List of checklist items

☐ Annual review and new goals completed

Conduct a formal review of the year and agree on clear objectives for the next period.

☐ One-year onboarding survey submitted

Gather final feedback on the end-to-end onboarding experience after a full year.

☐ Career path and advancement discussion held

Align on long-term career direction, growth steps, and potential advancement opportunities.

☐ Anniversary recognition shared with the team

Celebrate the employee's one-year milestone to reinforce appreciation and belonging.

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Conlusion

01.

A Guide, Not a Rulebook

This checklist is a flexible guide, not a rigid standard; treat it as a starting point, not a final answer.

02.

Customize for Your Reality

Adapt each step to your organization's size, culture, regulatory environment, and roles so it truly fits your context.
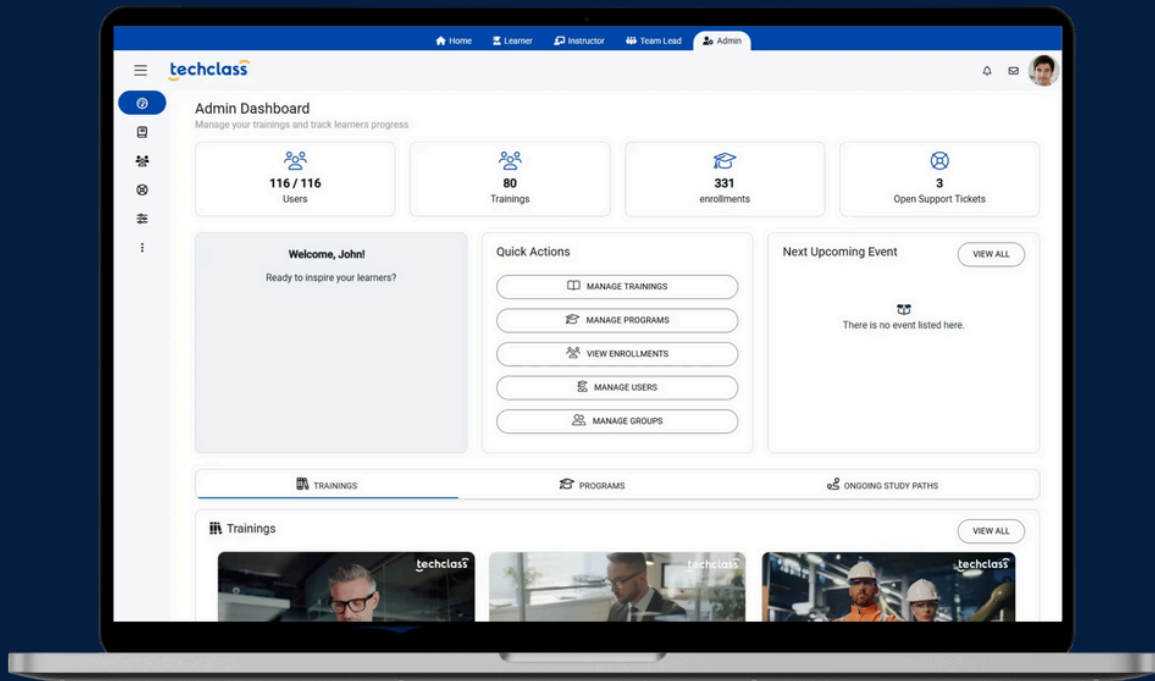
03.

Make Onboarding Truly Relevant

Adjust timelines, add role-specific actions, and ignore anything unnecessary so every new hire gets a clear, supportive, and relevant onboarding experience.