



MANAGED BY Q

# Onboarding Checklist



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Onboarding is a defining moment in an employee's life at a company. A new hire wants to feel welcome, prepared, and assured they've made the right career choice. This is a critical time period for a company, too. They want to successfully set an individual up to thrive and ultimately grow with the company long-term.

Designing a comprehensive, thoughtful onboarding plan will ensure a healthy employee-company relationship from the start. But putting that onboarding plan to practice isn't easy. You have to keep details organized, find creative ways to convey and instill your company culture, and remember: you're onboarding a person with individual goals, expectations, and needs.

Use this Onboarding Checklist as a guide to building your own bespoke onboarding plan. Print this out or use it as a reference in creating your own processes in Trello or [Managed by Q's Task Management tool](#).



# Before the 1st Day

**PREPARE EMPLOYEE PAPERWORK**

*Employment contract, W2 form, NDA, I-9*

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**ORDER TECH**

*Laptop/computer, monitor, keyboard, mouse, laptop*

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**SET UP IT/TECH STACK**

*G-suite, Trello/Asana, Slack, HighFive/Skype*

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**POPULATE NEW HIRE'S CALENDAR**

*All hands meetings, holidays, team lunch, company happy hours*

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**ORDER SWAG/BUSINESS CARDS**

*Make sure to double check your spelling!*

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**SET UP DESK/WELCOME PACK**

*Gather your company swag and decorate their desk*

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**IDENTIFY AN ONBOARDING BUDDY**

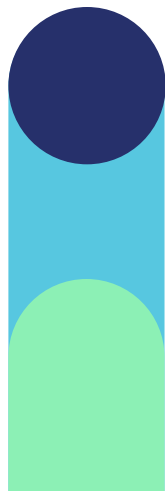
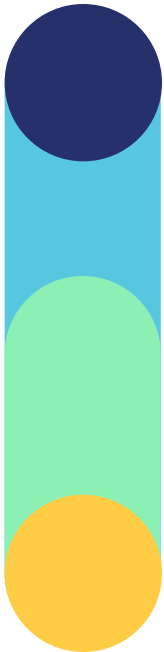
*Choose a coworker the new hire can go to for questions*

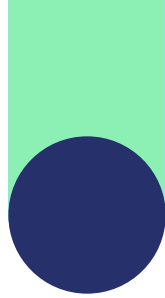
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**REMIND THE TEAM**

*Send a message to your coworkers that a new hire is starting and when*

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**OUTLINE DAY-OF DETAILS, EXPECTATIONS, AND ANY RELEVANT READING**

*Send an email 3-5 days before their first day with arrival info and your employee handbook*

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**ASK FOR DIETARY RESTRICTIONS/ANY OTHER CULTURE-RELEVANT QUESTIONS**

*Food preferences, shirt size, favorite GIF*

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# First Day - First Week

**GIVE A TOUR OF THE OFFICE**

*Show them how to book a conference room and what areas are designated for quiet work, eating, etc.*

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**WALK THROUGH YOUR INTERNAL REQUEST PROCESS**

*Let them know how to request supplies, IT support, or specific snacks*

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**ADD THEM TO EMAIL DISTRIBUTION LISTS**

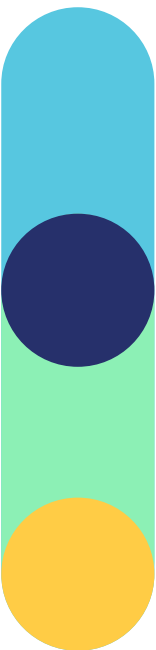
*Have your IT team add them to any relevant company-wide, city, or team email groups*

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**SCHEDULE TEAM LUNCH**

*Make sure the new hire's teammates are confirmed and excited for a welcome lunch*

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## After 30 Days

### SCHEDULE ORIENTATION SESSIONS

*Values and mission; Org chart and team breakdown; OKRs/ goals/metrics*

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### SCHEDULE COFFEE WITH THEIR ONBOARDING BUDDY

*Make sure their onboarding buddy meets them early in the week so they have a pal*

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### LEAVE ROOM FOR QUESTIONS!

*Onboarding can be overwhelming; hold space for questions and conversation*

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### SCHEDULE 30, 60, 90 DAY CHECK-INS

*Consider asking: "What worked? Where did you get stuck? What would you do differently?"*

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### REFLECT ON THE ONBOARDING EXPERIENCE

*Fold in feedback you've received with what you've noticed and iterate on the process*

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# Tips to Keep in Mind

- Think of the individual and their particular role: what are the elements of onboarding that apply to everyone and what aspects could be tailored to this person (e.g. What does onboarding look like for an engineer vs. a human resources manager?).
- Highlight what makes your office special: when and how can the company's culture, vision, and values be inserted?
- Track milestones of 30, 60, 90 days: ask for feedback on the onboarding process from new hires and managers and use that to refine your onboarding strategy.
- Consider scheduling a new hire's first day on a Friday: starting a job on a day that isn't Monday gives the new person more time to prep, reflect, and show up refreshed.
- Keep psychological safety top of mind: create a safe space for questions, seek to understand individual medical needs, social requests, and work preferences.
- Create an employee handbook: a central, easy-to-locate document that includes policies, benefits information, org charts, and even company acronyms will serve as an indispensable reference.

