

Onboarding Checklist and Flowchart



Before the employee's start date

- ☐ Outcomes: This is a welcoming work environment with informed colleagues and a fully-equipped work space; new employees feel "settled in" on their first day.

Schedule and Job Duties

- ☐ Call employee.
- ☐ Confirm start date, time, place, parking, dress code, etc.
- ☐ Identify computer needs and requirements.
- ☐ Provide name of their onboarding buddy.
- ☐ Remind employee to complete any orientation tasks that are needed (bring information for 1-9, insurance forms if applicable, etc.).
- ☐ Add regularly scheduled meetings (e.g. staff and department) to employee's calendar.
- ☐ Prepare employee's calendar for the first two weeks.
- ☐ Plan the employee's first assignment.
- ☐ Send Insurance information and employee handbook.

Socialization

- ☐ Email department/team/functional area of the new hire. Include start date, employee's role, and bio. Copy the new employee, if appropriate.

- ☐ Set up meetings with critical people for the employee's first few weeks.
- ☐ Arrange for lunch with the appropriate person(s) or buddy for the first day and during the first week.
- ☐ Select the buddy.
- ☐ Meet with the buddy, and provide suggestions and tips.
- ☐ Arrange for a building tour.
- ☐ Send employee welcome video.

Work Environment

- ☐ Put together a welcome packet from the department and include job description, welcome letter, contact names and phone lists, campus map, parking and transportation information, mission and values of the institute, information on your unit, etc.
- ☐ Clean the work area, and set up cube/office space with supplies.
- ☐ Order office or work area keys.
- ☐ Order business cards and name plate.
- ☐ Arrange for parking, if needed.
- ☐ Add employee to relevant email lists.

Technology Access and Related

- ☐ Order technology equipment (computer, printer, iPad) and software.
- ☐ Contact IT to have the system set up in advance.
- ☐ Arrange for access to common drives, and coordinate password authorizations.
- ☐ Arrange for phone installation.

Training/Development

- ☐ Begin creating a 90-day learning and development plan.
- ☐ Arrange pertinent trainings required for the job.

First Day

- ☐ Goal: The employee feels welcomed and prepared to start working; begins to understand the position and performance expectations.

General Orientation

- ☐ Clarify the first week's schedule, and confirm required and recommended training.

- ☐ Provide an overview of the functional area – its purpose, organizational structure, and goals.
- ☐ Describe how the employee's job fits into the department, and how the job and department contribute to the organization.
- ☐ Send employee on scavenger hunt to learn about company history as well as mission. vision. values. and employee value proposition.
- ☐ Invite other departments in to speak.
- ☐ Have employee do front-line work.

Socialization

- ☐ Be available to greet the employee on the first day.
- ☐ Introduce employee to others in the workplace. Create purposeful introductions.
- ☐ Introduce employee to his/her buddy.
- ☐ Take employee out to lunch.

Work Environment

- ☐ Give employee key(s) and building access card.
- ☐ Escort employee to orientation room.
- ☐ Remind employee to complete new hire tasks.

Technology Access and Related

- ☐ provide information on setting up voicemail and computer.

First Week

- ☐ Goal: New employee builds knowledge of internal processes and performance expectations; feels settled into the new work environment.

Department/individual Orientation

- ☐ Give employee his/her initial assignment. (Make it something small and doable.)
- ☐ Debrief with employee after he/she attends initial meetings, attends training. and begins work on initial assignment. Also touch base quickly each day.
- ☐ provide additional contextual information about the department and organization to increase understanding of the purpose, value add to company, goals, and initiatives.
- ☐ Explain the annual performance review and goal-setting process.

Socialization

- ☐ Arrange for a personal welcome from the unit leader.
- ☐ Arrange for group lunch with senior leaders.

Technology Access and Related

- ☐ Ensure employee has fully functioning computer and systems access and understands how to use them.

First Month

- ☐ Goal: Employee is cognizant of his/her performance relative to the position and expectations; continues to develop, learn about the organization, and build relationships. Employee feels 'connected'.

Department/Individual Orientation

- ☐ Schedule and conduct regularly occurring one-on-one meetings.
- ☐ Continue to provide timely, on-going, meaningful "everyday feedback."
- ☐ Elicit feedback from the employee and be available to answer questions.
- ☐ Explain the performance management process and compensation system.
- ☐ Discuss performance and professional development goals. Give employee an additional assignment.

Socialization

- ☐ Continue introducing employee to key people and bring him/her to relevant events.
- ☐ Meet with employee and buddy to review first weeks and answer questions.

Training and Development

- ☐ Create employee annual training plan.
- ☐ Ensure employee is signed up for necessary training.

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