



# New Hire Checklist Template

Here is the beginning of a sample New Hire Checklist for employers. The task owner is listed in bold font and underlined. This is the person/function/team responsible for the agenda item on the onboarding checklist.

Pre-Boarding

## Pre-Boarding 2-4 Weeks Before (or Starting from Offer Signature):

### Recruiting

Announce Hire to Team via “Win Email” — include new hires email address so employee’s can send congratulatory emails to the new hire

If applicable, run background check

First Day

### HR

Send onboarding welcome email to new hire — make sure this is within 24 hours! You want to capitalize on their excitement from the recency of signing the offer

Add new hire start date to calendar and add relevant teams

Onboard new hire to HRIS system

### Manager

Complete Hiring Manager Form — assign onboarding buddy, assign desk, assign email groups/tools provision preferences

### IT

Order technical equipment — laptop, mouse, keyboard, monitor, etc.

Provision new hire — email creation, group and access provisioning, key fob creation, etc.



## Pre-Boarding 2-4 Weeks Before (cont.):

### Manager & HR

- Invite new hire to a team or event preceding the start date — if there is a significant amount of time between a new hire signing an offer and starting at the company, see if you can find an event for the new hire to come out and get to know the team or company in a social setting

## Pre-Boarding 1 Week Before:

### Facilities

- Clean desk area

### Manager

- Begin “Road to Success” Form — outline goals and expectations desired
- Add new hire to any important reoccurring team meetings
- Setup 1:1 meetings between the new hire and any instrumental colleagues that the new hire will be closely working with
- Organize welcome lunch for new hire at local restaurant — include team members, important cross-departmental connections, or cultural champions
- Assign Dept/Team-specific trainings for new hire

### HR

- Assign company-wide trainings for new hire
- Assign buddy to new hire and communicate responsibilities to buddy
- Confirm “Week 1” schedule for new hire — to be presented to new hire on Day 1



## Pre-Boarding 1 Week Before (cont.):

### HR

- Send First Day Details to new hire (when to arrive, who to contact, office address, etc.)

## First Day

### Facilities

- Early in the morning, set up new hire swag on desk — let your company branding shine through!

### IT

- Place new hire laptop and tech setup on desk — include instructions in a one-pager with information on things like WiFi passwords, gaining access to work email, etc.

### Buddy & New Hire

- Coffee meeting — new hire and buddy grab a welcome coffee and do an office tour (Your new hire will thank you when you teach them how the coffee machine works!)

### IT & New Hire

- Meeting — Laptop setup and equipment troubleshooting

### Manager & New Hire

- New hire and manager morning meet & greet — manager presents Week 1 schedule to new hire

First Day



## **HR & New Hire — Live (or Virtual) New Hire Orientation**

### *Tactical*

- Technical Access: Confirm new hire can access all company-wide tools (HRIS, company intranet, etc.)
- Complete Forms: New hire completes Part 1 of I-9, W-4, direct deposit information, confidentiality agreement, employee handbook acknowledgement, benefit elections and 401k election
- Present employee with their new employee checklist

### *Cultural*

- Culture Overview: Core values, mission/vision, company goals
- Overview onboarding contacts available to the new hire and network map of helpful persons during their first month

### *Job Knowledge*

- Review importance of the Road to Success Form

## **Manager & New Hire & Team**

- Welcome Lunch — new hire and pre-selected group celebrate at lunch

## **Facilities & New Hire**

- Take photo of new hire for identification card & goofy company photo wall
- Walk new hire to commuter lot to register for parking

## **Manager & New Hire**

- Meeting — End-of-day catch-up with new hire



## First Day (cont.):

### HR

- Complete paperwork — Part 2 & 3 of I-9
- Onboard new hire to benefit carriers
- Organize monthly “New Hires Lunch” for all new hires to attend

## First Week:

### New Hire

- Sign & acknowledge company handbook
- Complete compliance training (anti-harassment training, etc.)
- Review all company policies
- Send new hire introduction email to company

### Manager & New Hire

- New Hire “Road to Success” Meeting with manager — review Road to Success Form including 30/60/90/180 goals, expectations, and onboarding resources
- End-of-day catch-up meeting with new hire on Wednesday/Friday EOD

### Buddy & New Hire

- Coffee meeting — casual coffee with new hire

### HR & New Hire

- End-of-week check-in meeting with new hire

First Week



## First Month:

### Manager & New Hire

- 30 Day Check-In — reflection, evaluation, realignment
- Continue having reoccurring 1:1 meetings to discuss performance

### New Hire

- All company-wide trainings complete

### All New Hires

- Lunch Meeting — casual lunch with all new hires only (this gives them time to bond since they are likely going through similar onboarding experiences)

### Manager

- Lunch Meeting — casual lunch with new hire

## First 3 Months:

### Manager & New Hire

- 90 Day Check-In — reflection, evaluation, realignment
- Continue having reoccurring 1:1 meetings to discuss performance

### New Hire

- All department and team-specific trainings complete

First 1-3 Months



## First 3 Months (cont.):

### Company

- Quarterly New Hire Welcome Happy Hour

### HR

- Send Onboarding Survey to new hire
- Overview of the performance management process with new hire

## First 6 Months:

### Manager & New Hire

- 180 Day Check-In — reflection, evaluation, realignment
- Continue having reoccurring 1:1 meetings to discuss performance
- Discuss possible growth or professional development opportunities for the new hire

## First Year:

### Manager & New Hire

- Annual “Year in Review” — annual evaluation of the first year’s performance and growth

### HR

- Celebrate new hire’s work anniversary!