

Employee Onboarding Checklist

Make sure to cover each of the six steps below, and add details around the expected process for each.



1. Introduction to manager

Establish a strong rapport and set expectations. Managers play a pivotal role in employee engagement and professional development success!

2. Connecting with coworkers

Schedule 1-to-1 meetings with any colleagues with whom the new hire will be interacting regularly in their roles. Consider also something more creative like joint projects or learning activities.

3. Communications access and setup

Ensure the new hire is fully onboarded into the office email, chat, and other key communication systems. Standardize training to use them in line with company guidelines.

4. Forms and paperwork

For example: HR documents, W2 forms, employee handbooks, confidentiality agreements. Maintain a comprehensive list and consider detailing why each one is needed.

5. Initial job training and skills development

Identify and address any skills gaps that may inhibit the employee's success in their role, as well as any unique company-specific training.

6. Career path roadmapping

Connect with the new hire to document their career goals and develop a roadmap for skill-building and professional development to help reach them!

7.

Use this field to add any employee onboarding steps that are critical for new hire success at your organization.

8.

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