Preboarding

Employee Onboarding Checklist for Success

☐ **Send the job offer email and collect the signed offer letter**

☐ **Send a welcome email after the employee returns the offer letter that provides:**

- Start date and manager name
- A list of documents to complete before the start date
- Any physical documents that the employee needs to bring on their first day
- What to expect on day one — this might include parking information for onsite employees, an agenda, dress code, lunch details, etc.
- Whom to contact with questions prior to their start date.

☐ **Request that the employee complete and submit any required hiring documents:**

- I-9 (verifies identify and eligibility to work in the US)
- W-4 (indicates withholdings for federal tax compliance)
- State and local tax withholding forms
- Direct deposit form
- Permission to conduct background check
- Employee handbook acknowledgment
- Emergency contact information

☐ **Submit equipment requests, which may include:**

- Computer
- Phone
- Safety gear
- Security badge, ID, and/or office key

☐ **Announce the new employee to the company and/or team**

Orientation

Employee Onboarding Checklist for Success

☐ **Go over the agenda and any housekeeping items for the orientation session**

☐ **Collect any outstanding new hire paperwork**

☐ **Ensure all access credentials and logins work for the employee**

☐ **Introduce your company mission and values**

☐ **Explain benefits and the enrollment period**

☐ **Review the employee handbook and essential policies, such as:**

- Safety
- Information security
- Data privacy
- Diversity, equity, inclusion, and accessibility

☐ **Arrange a tour of the facilities or a virtual meet and greet with the team**

☐ **Schedule time for the new employee to meet 1:1 with their manager**

☐ **Build in activities to help new employees bond with one another**

☐ **Hand out some swag!**

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Training and Development

Employee Onboarding Checklist for Success

☐ **Assign any compliance policy trainings that employees must complete**

☐ **Send a survey to assess how new employees felt about their orientation experience**

☐ **Touch base with people managers to evaluate how effective orientation was in preparing new employees**

☐ **Invite new employees to join a peer group on your internal communication hub**

☐ **Schedule 30-60-90-day check-ins between employees and managers**

☐ **Send periodic employee satisfaction surveys with questions like:**

- Do you feel your job role and responsibilities are clearly defined?
- Do you have the resources you need to be successful in your job?
- Do you feel valued for your contributions?
- Do you feel connected to your coworkers?
- What types of learning and development resources are most helpful to you?

☐ **Remind managers when six-month and one-year anniversaries are coming up**