

BLULEADZ

New Employee Onboarding Checklist



New Employee Onboarding Checklist

Preparation for the First Day

Prepare any necessary paperwork

- W-4
- I-9
- Insurance forms
- Direct deposit forms
- Non-disclosure agreement

Deliver employee handbook

- Mail
- Email
- In person

Arrange form of payment

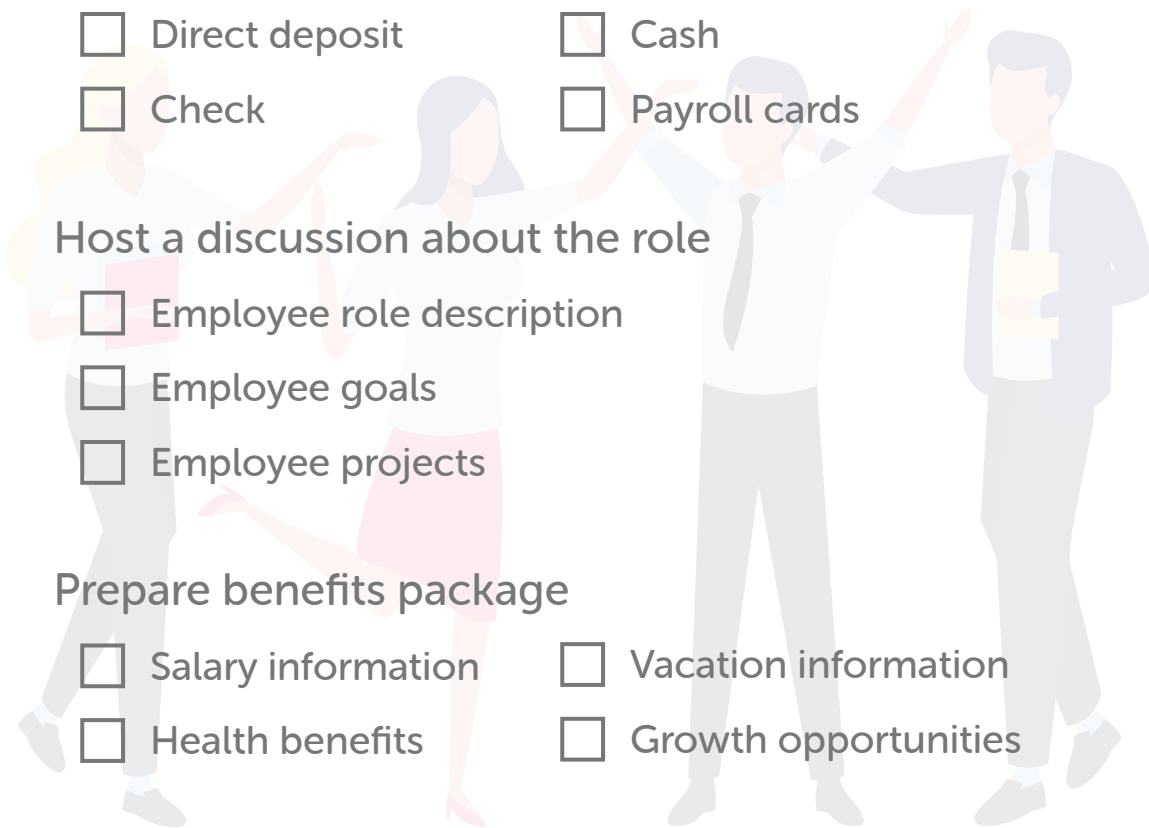
- Direct deposit
- Check
- Cash
- Payroll cards

Host a discussion about the role

- Employee role description
- Employee goals
- Employee projects

Prepare benefits package

- Salary information
- Health benefits
- Vacation information
- Growth opportunities



New Employee Onboarding Checklist

Preparation for the First Day (Cont.)

Create any necessary accounts

- Email
- Project management software
- Learning management software
- Other business software: _____

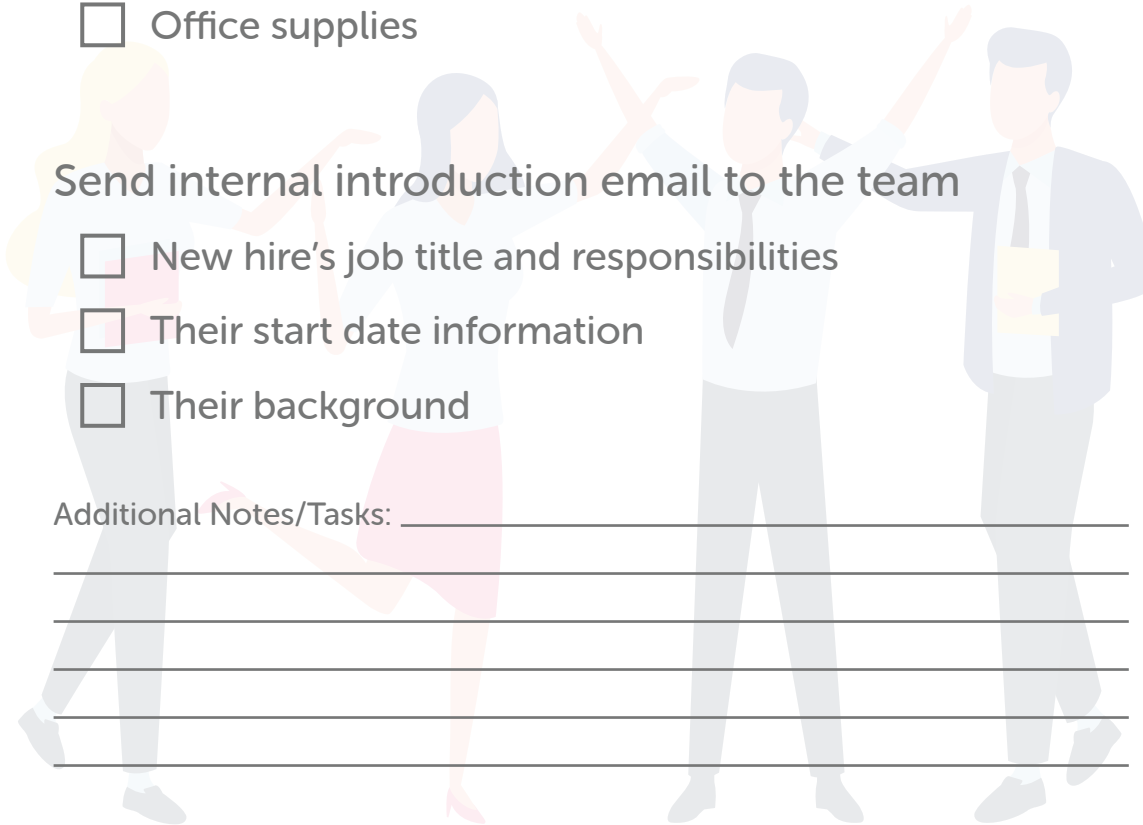
Set up employee work station

- Desk
- Technology (laptop, phone, etc.)
- Office supplies

Send internal introduction email to the team

- New hire's job title and responsibilities
- Their start date information
- Their background

Additional Notes/Tasks: _____



New Employee Onboarding Checklist

The First Day

Introduce them to the team and supervisors

- One-on-one meeting with leadership
- Group lunch

Give a tour of the office

- Common areas
- Reception area
- Restrooms
- HR department
- Support desk
- Their workspace
- Kitchen
- Leadership offices

Provide training material

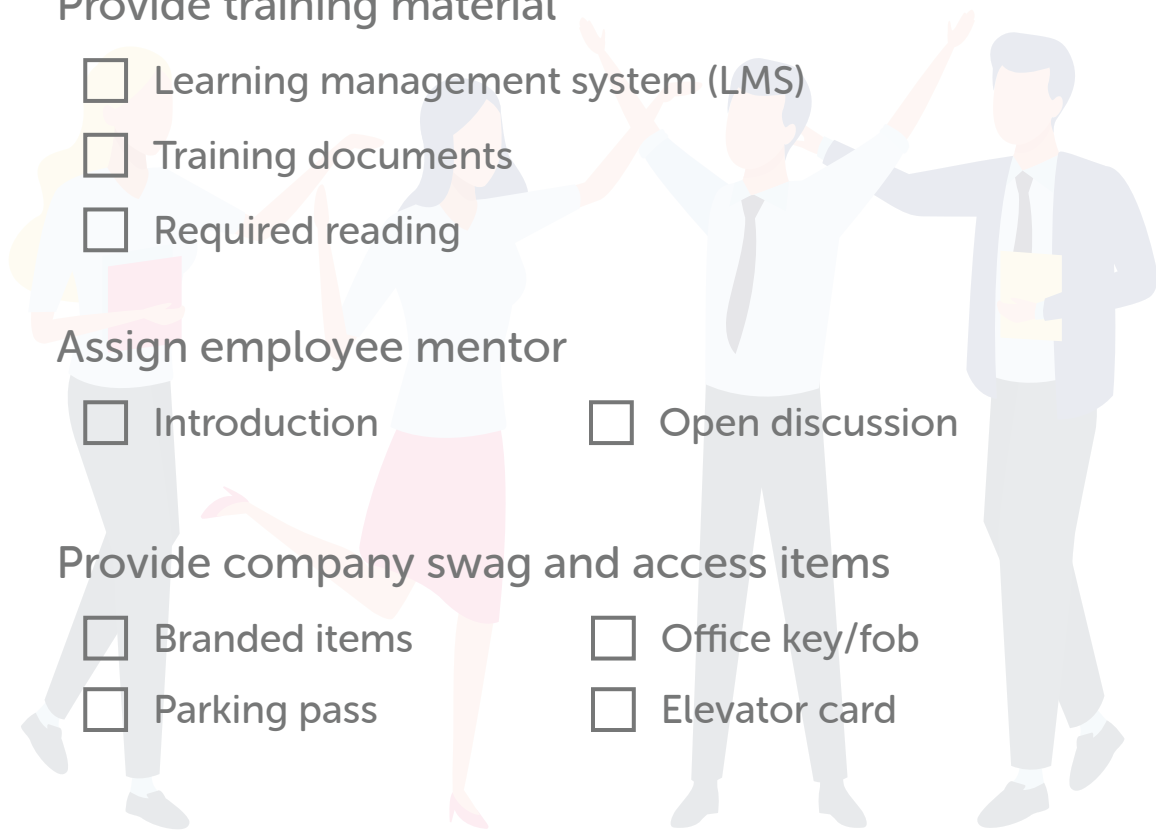
- Learning management system (LMS)
- Training documents
- Required reading

Assign employee mentor

- Introduction
- Open discussion

Provide company swag and access items

- Branded items
- Office key/fob
- Parking pass
- Elevator card



New Employee Onboarding Checklist

The First Day (Cont.)

Meeting with CEO/hiring manager to discuss:

- Code of conduct
- Company mission
- New hire questions
- Core values
- Company history
- Compensation & benefits
- Expectations

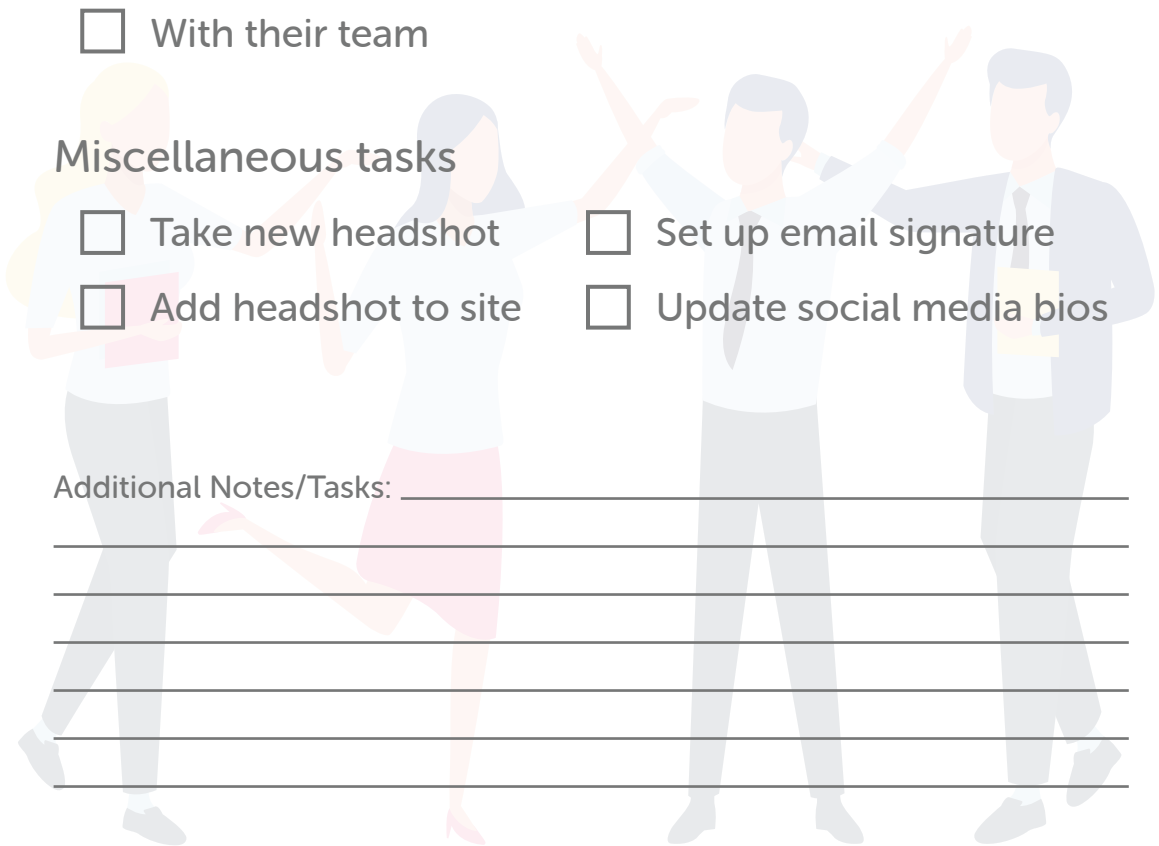
Take them out for lunch

- With leadership
- With mentor
- With their team

Miscellaneous tasks

- Take new headshot
- Set up email signature
- Add headshot to site
- Update social media bios

Additional Notes/Tasks: _____



New Employee Onboarding Checklist

The First Week

Complete any training modules or tutorials

- Schedule deadlines
- Provide assistance

Assign their first project

- Check in regularly
- Provide immediate feedback

Build goals for the next month

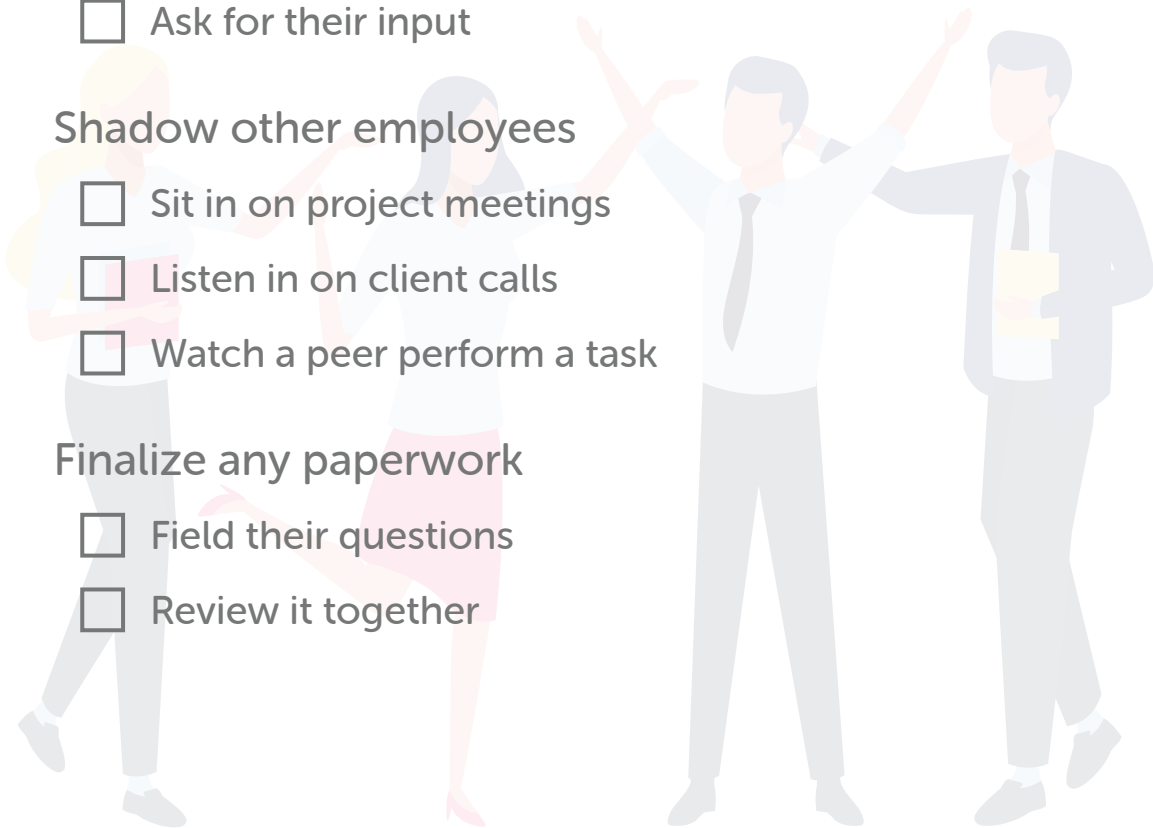
- Explain each goal
- Ask for their input

Shadow other employees

- Sit in on project meetings
- Listen in on client calls
- Watch a peer perform a task

Finalize any paperwork

- Field their questions
- Review it together



New Employee Onboarding Checklist

The First Week (Cont.)

Schedule regular check-ins

- Set agenda
- Encourage questions and concerns

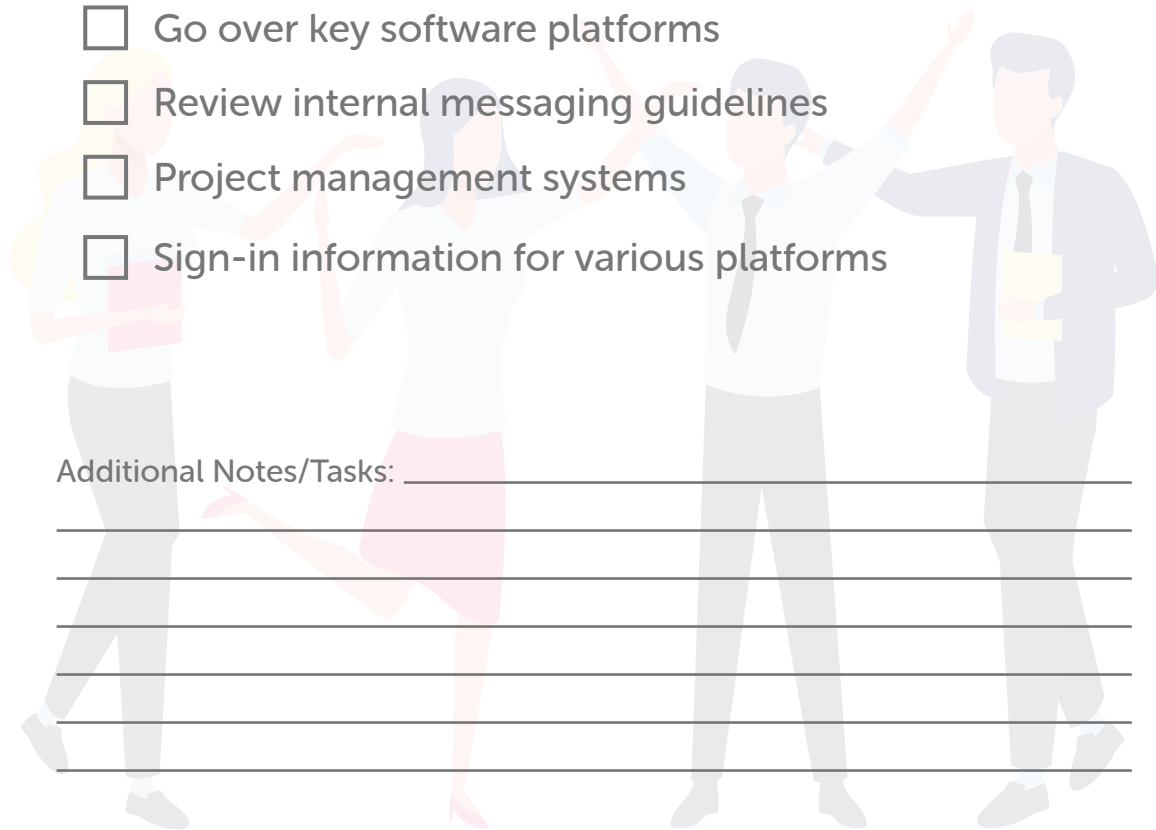
First week recap

- One-on-one meeting with leadership
- Discuss challenges and questions
- Review their job role and responsibilities

Set up a hands-on training

- Go over key software platforms
- Review internal messaging guidelines
- Project management systems
- Sign-in information for various platforms

Additional Notes/Tasks: _____



New Employee Onboarding Checklist

The First Month

Establish long-term goals

- Show how they fit into big-picture goals
- Highlight how small goals align with long-term goals

Induct into company culture

- Create time for informal socializing
- Plan out of office and after-hour events

Continue regular check-in meetings

- Track their progress
- Review project/client work
- Recognize their accomplishments
- Highlight any strengths and weaknesses
- Make sure they understand their role

Gather employee feedback

- Address any major issues or concerns
- Make sure the new employee is following through on expectations

Request feedback for your onboarding process

- Distribute a survey
- Review input

