



## New Employee Onboarding Checklist

Many (not all) of the following tasks can be owned by the employee and placed into an Excel spreadsheet with timelines assigned and a place for the employee to track progress, status, and notes. To aid in retaining information, onboarding can be turned into a self-paced training or scavenger hunt where employees track down various people, resources, or project information. Recommended book for new employees: *The First 90 Days*

- Address all Human Resources policies and procedures.
- Assign equipment and logins.
- Provide a broad company orientation that includes company history, vision, mission, philosophy, and strategic initiatives.
- Schedule departmental shadowing and informational interviews with people outside of the employee's immediate area.
- Coordinate a 'teach back' to the team. (Employee presents to their team what they learned during shadowing and informational interviews).
- Provide the employee with all internal links to resources and information.
- Conduct team orientation by providing names of teammates and all project information.
- Schedule one-to-ones with teammates.
- Schedule one-to-ones with clients and project stakeholders.
- Coordinate another 'teach back' to the team. (Employee presents what they learned about teammates, clients, stakeholders, and projects).
- Assign a team buddy to assist with team-level questions.
- Schedule weekly one-to-ones with the manager.
- Create a 30 / 60 / 90-day goal plan in collaboration with the new employee.
- Initiate career conversations within 90 days.
- Assign a mentor (preferably not the employee's manager) to help with broader topics (i.e., company culture, best practices, various styles of communication).
- Provide continuous communication, feedback, and recognition.
- Clearly state all expectations.
- Virtual onboarding should include the same content as in-person onboarding, except to include more information about the company's:
  - virtual protocol.
  - virtual best practices.
  - resources about remote work, work-life balance, how to work remotely with clients and coworkers.
- Conduct periodic surveys to measure the success of the onboarding program.
- Gather retention statistics to determine if employees are staying/leaving due to the onboarding program.
- Collect feedback about the onboarding program when conducting exit surveys.
- Gather verbal feedback about the onboarding program from the new hire during one-to-ones with the manager.