recruitee

Onboarding Checklist Free Downloadable

Use this checklist to maintain a slick, consistent onboarding process for your candidates. Support and nurture them from candidate to employee.

💡 How this template works

We've created this printable onboarding checklist to reduce any mishaps or forgotten phases while nurturing their journey from candidate to employee.

Simply print (or edit) this document and check each box once you've completed a task. There's additional space for notes at the bottom of the document.

☑ [Your company]'s Onboarding Checklist

Before filling out the checklist, begin with filling out information about your new hire and any relevant notes or to-dos that are not covered in this checklist.

New hire name:

Role:

Department:

Start date:

Additional notes:

💼 Prior to start

From the "prior-to-start" phase to the "first-three-months" phase, use this checklist to ensure your candidate feels welcome, informed, and nurtured effectively.

- ○ Confirm employee's start date (and time)
- ○ Provide code of conduct document
- ○ Send the company's onboarding website link
- ○ Email/mail the employee a welcome pack
- ○ Perform reference checks
- ○ Perform background checks
- ○ Provide an offer letter (via email or mail)
- ○ Request an offer acceptance letter
- ○ Send contract for signage
- ○ Set up their workspace
- ○ Inform IT and request system access for the new employee
- ○ Request a lanyard and passkey
- ○ Order email and phone configuration
- ○ Prepare necessary hardware and software
- ○ Organize and schedule any onboarding training
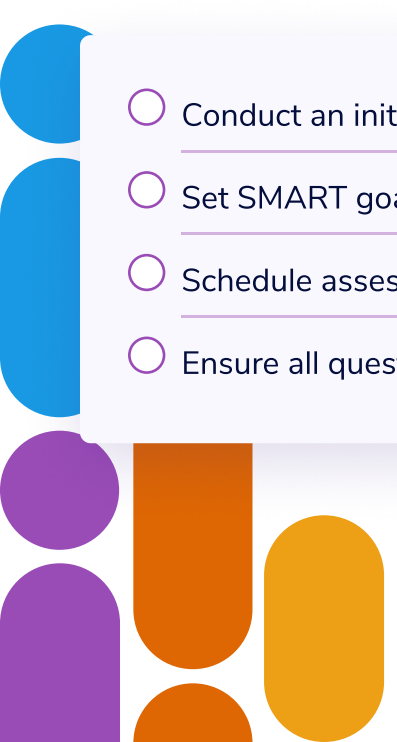- ○ Check-in with the new hire prior to the start date

🖐️ Week 1

○ Schedule a catch-up meeting to ask how the first week went

○ Discuss potential struggles and difficulties

○ Ensure technology is functioning

○ Make sure the new employee feels welcome and included

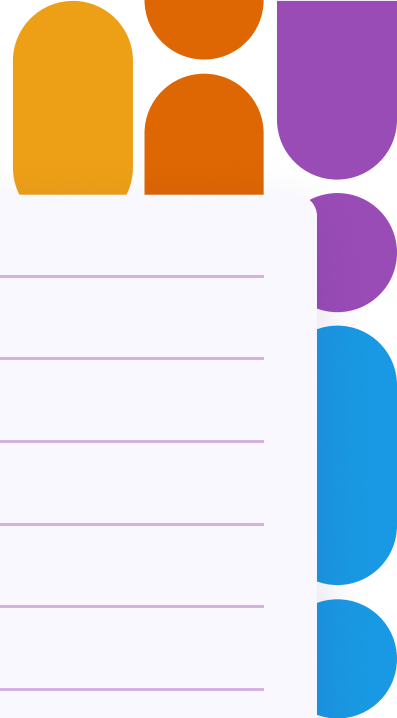○ Introduce the company's values, mission statement, and future goals

✈️ Month 1

○ Schedule meetings to ensure positive progress and high employee engagement

○ Encourage the employee to ask questions and provide answers

○ Introduce SMART goals

○ Set SMART goals

○ Provide additional support if needed

✈️ First 3 Months

○ Conduct an initial performance review

○ Set SMART goals to span across the next 3 months

○ Schedule assessment and evaluation meetings based on SMART goals

○ Ensure all questions are answered

✏️ **Notes:**