The Onboarding Execution Checklist

This checklist is designed for day-to-day use, with tasks broken down by the individual responsible for completing them.

Phase 1: Pre-Boarding (After Offer Acceptance)

Category	Task	Responsible Party
Administrative & HR	☐ Initiate digital paperwork and tax forms in the HRIS.	HR
	☐ Send the official welcome email with start date, time, and logistics.	HR
	☐ Initiate the background check and verify necessary documents.	HR
	☐ Announce the new hire's upcoming start to the team.	HR
IT & Equipment	☐ Order and configure the new hire's laptop and necessary accessories.	IT
	☐ Create all system accounts and login credentials.	IT
	☐ Set up a temporary password and a plan for providing it securely.	IT
Manager & Team	☐ Send a personal welcome message to the new hire.	Manager
	☐ Customize the 30-60-90 Day Plan.	Manager
	☐ Select and assign a buddy, and send them the buddy checklist.	Manager
	☐ Plan a team welcome lunch or coffee break for Day 1.	Manager
New Hire	☐ Complete all digital paperwork as requested.	New Hire

Phase 2: Day One Immersion

Category	Task	Responsible Party
Administrative & HR	☐ Greet the new hire in person (or via video call for remote).	HR
	☐ Conduct a brief, high-level orientation (focused on culture, mission, and vision).	HR
	☐ Explain benefits enrollment and key policies.	HR
IT & Equipment	☐ Walk the new hire through their equipment setup.	IT
	☐ Provide login credentials and verify access to all systems.	IT
	☐ Conduct a brief security and data privacy training.	IT
Manager & Team	☐ Personally welcome the new hire to the team.	Manager
	☐ Conduct a one-on-one meeting to review the 30-60-90 Day Plan.	Manager
	☐ Give the new hire their first small, achievable task.	Manager

	☐ Introduce the new hire to their buddy and key colleagues.	Manager
	☐ Facilitate team introductions and the welcome lunch.	Manager / Buddy
New Hire	☐ Complete any final paperwork.	New Hire
	☐ Begin their first task.	New Hire
	☐ Get to know their team and workspace.	New Hire

Phase 3: Deepening Integration (Week 1 to Day 30)

Category	Task	Responsible Party
Administrative & HR	☐ Schedule the 30-day feedback survey and automated reminder.	HR
Learning & Development	☐ Hold weekly one-on-one meetings to review progress.	Manager
	☐ Assign foundational training modules and tasks.	Manager
	☐ Provide immediate, specific, and constructive feedback on early work.	Manager
Team & Culture	☐ Maintain regular check-ins to answer informal questions.	Buddy
	☐ Facilitate social integration with the wider team.	Buddy
Performance & Feedback	☐ Actively participate in team meetings and ask questions.	New Hire
	☐ Take the 30-day feedback survey.	New Hire

Phase 4: Accelerating Contributions (Day 31 to Day 90)

Category	Task	Responsible Party
Administrative & HR	☐ Review 30-day survey feedback with the manager.	HR
	☐ Schedule the 90-day feedback survey.	HR
	☐ Check in with the manager and new hire separately around the 60-day mark.	HR
Performance & Development	☐ Hold a formal 60-day performance review against the plan.	Manager
	☐ Gradually increase the new hire's autonomy and assign projects with ownership.	Manager
	☐ Discuss long-term career goals and development opportunities.	Manager
Team & Culture	☐ Involve the new hire in company-wide events and celebrations.	Manager / Team
Performance & Feedback	☐ Take on more complex tasks and contribute independently.	New Hire
	☐ Proactively seek opportunities for learning and growth.	New Hire
	☐ Complete the 90-day feedback survey.	New Hire

| Final Review | ☐ Hold the final 90-day formal performance review and celebrate their transition to a fully integrated team member. | HR & Manager |