

Onboarding Checklist



Pre-Boarding Checklist:

Task	Description	Sent/Done	Employee Completed
Employment contract	Send the new hire an employee contract (when applicable) with an e-signature option.		
Government forms	Send the new hire any applicable government forms that they can complete before their first day (e.g., I-9, W-4, etc.).		
Agenda/Schedule for the first day	Send the new hire a detailed outline for their first day. Include any information about meetings, breaks, and free time that can help them prepare for their start date.		
Onboarding swag package	Send the new hire an onboarding swag package (e.g. branded shirt, treats, a welcome letter from the CEO, employee handbook, branded gear, etc.).		N/A
Consolidate equipment/logins /workspace	Work with IT to gather logins, secure equipment, and set up the new hire's workspace. If this is the hiring manager's responsibility, check in to make sure everything is ready for the new hire's start date.		N/A

Let their team know who is starting and when	Alert the new hire's team about the start date for their new team member.	N/A
Manager specific: Direct report information	Compile information about the new manager's direct reports' roles and responsibilities.	N/A

First Day Checklist:

Task	Description	Sent/Done	Employee Completed
Facility tour (if in office)	Set up an office tour with someone from the new hire's team (or an assigned mentor) or take the new hire on the tour.		
Team welcome lunch	Set up a team activity (or check in with the hiring manager to ensure something is planned). Activity ideas include trivia games, an offsite activity (escape room, golf, etc.), personality tests, team games (basketball, board games, soccer), a movie, etc.		
Finish benefits paperwork	Help the new hire finish any outstanding benefits paperwork.		
Finish any other unfinished paperwork	Remind the new hire to finish any other unfinished paperwork (payroll, government forms, benefits, etc.).		
Company values and mission statement	Include an introduction and explanation of the company's values and mission statement in the onboarding experience.		

Personality tests/profiles	Administer a personality test to each new hire. Results can help employees know how to best work with their new team member.		
First Week Checklist: Task	Description	Sent/Done	Employee Completed

Task	Description	Sent/Done	Employee Completed
Introduce mentor program (if applicable)	Facilitate an introduction between the new hire and their mentor (when a mentor program is in place).		
Check in with manager on new hire job training	Check in to make sure job training is in place and started.		
HR/safety training	Administer any safety training or other HR training that all employees are required to complete.		
Check in with manager on new hire's first 1:1 with manager	Make sure every new hire has a 1:1 scheduled with their manager.		
Introduction to other team members/cross-functional team members	Facilitate introductions between the new hire and critical members of their department and cross-functional team members that can help them do their job successfully.		
Manager specific: Manager-specific training	Set up/deliver any manager- specific training available (communication, conflict management, leadership essentials, DE&I, management styles, budget training, etc.)		

Manager specific: Performance reviews, KPIs, OKRs, and feedback information	Deliver information about performance review training, KPIs and OKRs, and how the organization manages feedback with all employees.	
Manager specific: 1:1s with each direct report	Check in to make sure the new manager has set up 1:1s with each direct report.	
Manager specific: Introductory meetings	Schedule any other introductory meetings the new manager might need with finance, HR, other managers, etc.	
New manager through promotion specific: Manager mentor	Assign an experienced manager to the new manager through promotion.	
New manager through promotion specific: Manager mentor meeting	Check in to make sure the new manager has met with their manager mentor.	

First Month Checklist:

Task	Description	Sent/Done	Employee Completed
Check in with new hire (consider sending a 30-day onboarding survey)	Send a 30-day new hire survey to assess your onboarding program.		
Check in with the hiring manager (consider sending a 30-day new hire survey)	Send a 30-day hiring manager survey to assess how well the new hire is integrating into the business.		N/A
Regular team-building opportunities	Make sure regular team-building activities are planned and executed by the hiring manager.		N/A

First 90 Days and Beyond Checklist:

Task	Description	Sent/Done	Employee Completed
New hire satisfaction survey at 90 days	Send a 90-day employee satisfaction survey.		
Manager check in at 90 days	Check in with the manager to assess the new hire's success in the first 90 days.		N/A

Build a Better Onboarding Experience with Motivosity

Get new hires integrated into their team and the business as a whole faster with Motivosity. With all the right tools to strengthen cultural onboarding—employee spaces, personality tests, employee surveys, company directory, and more—new hires get up-to-speed quickly, helping you increase retention and increase productivity.

With Motivosity, you can make your employees' experience at work more meaningful, get real-time insights into employee engagement, help managers create the right habits focused on employees, and build a community of connection and gratitude with peer-to-peer recognition.

Motivosity is the people-first Recognition and Rewards solution for today's workforce.

