

How to Create a New Hire Onboarding Checklist

Building a new hire onboarding checklist gives your HR team and hiring managers a shared, repeatable plan for bringing employees into the company successfully. Effective onboarding significantly impacts retention and helps new employees adjust to their roles quickly, because onboarding is the process of assisting newly hired employees to adjust to the performance aspects of their new jobs. During onboarding, employees learn the attitudes, knowledge, skills, and behaviors required for effective functioning within the organization, so managers should provide hospitality and a workable environment from the start. This document walks through how to create a new hire onboarding checklist across five main segments – pre-boarding, orientation, first week, third month, and sixth month – so your organization has a clear, structured process from offer acceptance through the employee's first year.



ONBOARDING DEFINITION

- Organizational socialization
- Assisting new hired employees
 - Learn essential aspects of their job
- Effective functioning in the organization
- Better hospitality and workable environment

Slide titled "Onboarding Definition" listing organizational socialization, assisting newly hired employees, learning essential aspects of the job, effective functioning in the organization, and better hospitality and workable environment.



ONBOARDING DEFINITION

Organizational socialization

Assisting new hired employees

Learn essential
aspects of their job

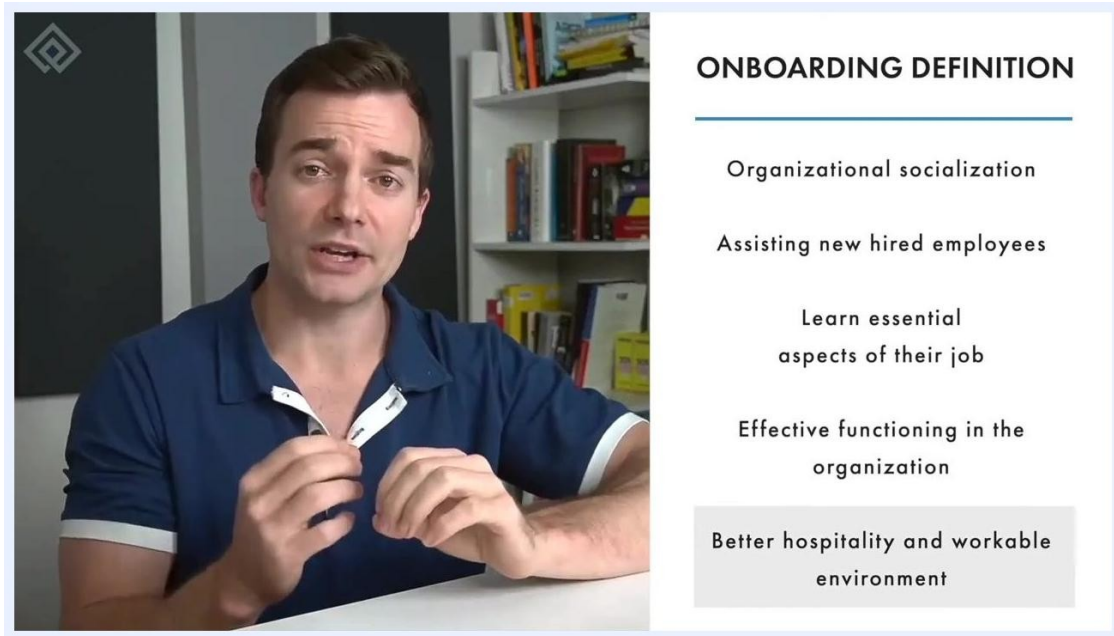
Effective functioning in the
organization

Better hospitality and workable
environment

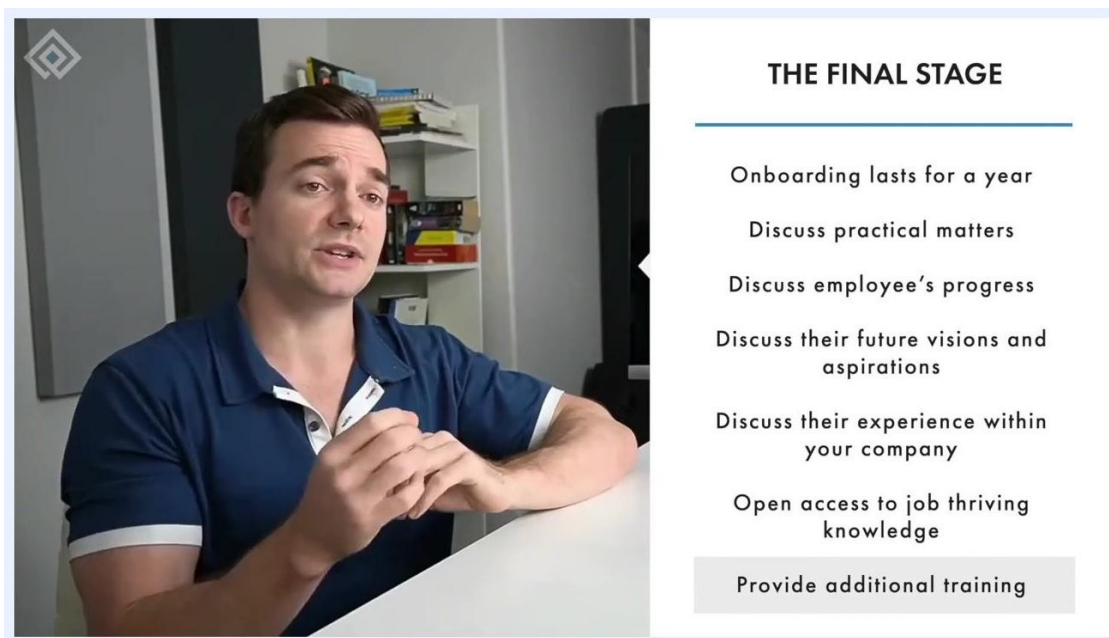
A presenter in a professional setting with a YouTube subscribe bar, thumbs up/down, and bell icon visible. The HR University logo and "Human Resources Training and Community" are displayed.

Role Context

Onboarding covers five main segments: pre-boarding (preparation before the employee's first day), orientation (welcoming the new employee), the first week (introducing the employee to the company, colleagues, and role), the third month (training and feedback), and the sixth month (check-in and feedback). Each segment has a distinct purpose in helping the employee integrate and reach full effectiveness in the role.



Colorful infographic showing the five main onboarding segments: pre-boarding, orientation, first week, third month, and sixth month.



The presenter gestures, with a lower-third overlay showing "HR UNIVERSITY | HUMAN RESOURCES TRAINING AND COMMUNITY" and interactive icons for like, dislike, subscribe, and notifications.

This section of your checklist should record the specific role title, team, reporting manager, work location, and confirmed start date, along with the success outcomes the new hire is expected to reach by the end of onboarding; these specifics are set by HR and the hiring manager for each new hire and are not standardized in this guide.

Preboarding Checklist

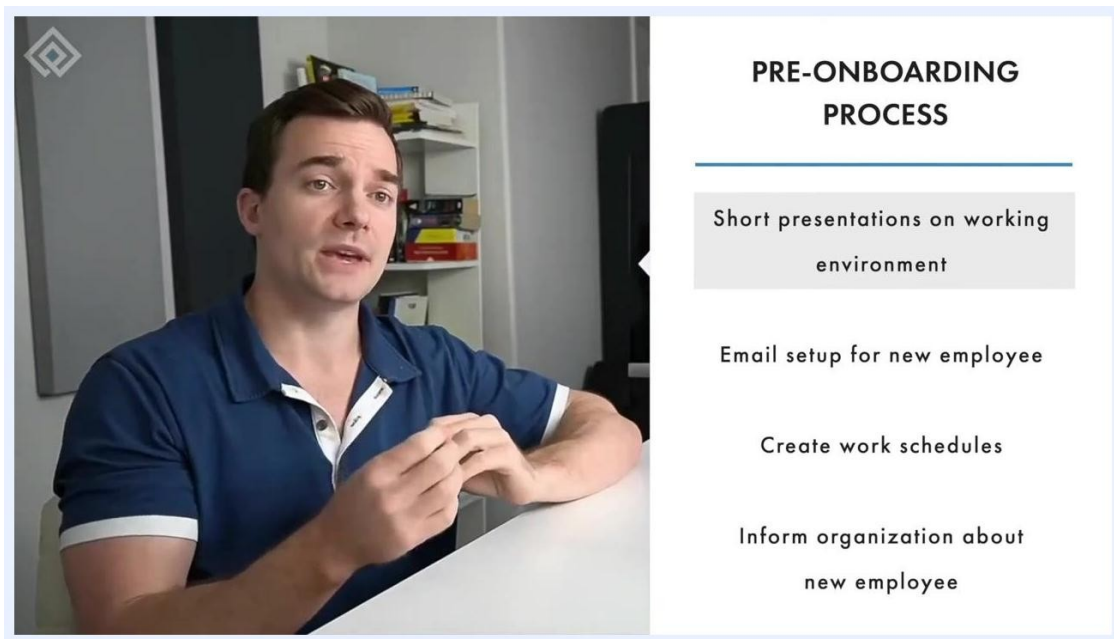
Pre-onboarding begins immediately after the employee accepts a job offer. New hires may overthink their decision and experience mixed feelings about the company during this period, so it is critical for HR to keep the new hire motivated and connected before their first day.

Complete the following actions before the employee's start date:

- Create a short video or presentation: Develop a brief, friendly, and genuine overview of the working environment and the employee's daily duties, including a summary of your company's culture. Avoid generic or patronizing language so the new hire can visualize their future workplace and feel welcomed.
- Set up professional email and system access: Create a professional email account and provide access to necessary company systems, cloud

computing software, and any platforms required for the role so the new hire can reach important documents and resources before day one.

- Enable early engagement with company projects: Allow the new employee to review previous projects and company materials so they can learn more about the organization and its operations ahead of starting.
- Assist in creating a work schedule: Outline daily duties and expectations, and help the new hire build a working schedule for their first day and first week. This structure fosters healthy working habits and helps the employee build momentum from the start.
- Inform the organization about the new hire: Notify relevant teams and departments about the incoming employee so everyone is prepared to welcome and support the new team member, which prevents the new hire from feeling like an outsider.



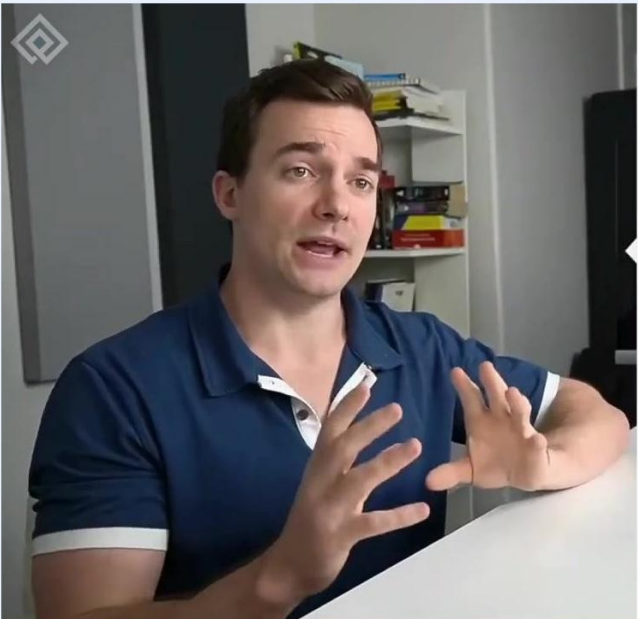
Slide titled "Pre-onboarding Process" listing short presentations on the working environment, email setup for the new employee, creating work schedules, and informing the organization about the new employee.

Also complete these physical and logistical preparations before the first day:

- Organize the new employee's office desk: Prepare the workspace so it is clean, organized, and ready for arrival.
- Reassess and adjust working equipment: Review equipment needs (computer, phone, chair, etc.) and make any necessary adjustments or upgrades so everything is functional and comfortable.

- Prepare a warm welcome package: Gather company-branded materials such as notepads, pens, pencils, and other useful items, and place them on the new employee's desk to create a welcoming atmosphere.

- Confirm all preparations are complete: Double-check that the workspace, equipment, and welcome materials are ready before the employee arrives.



PRE-ONBOARDING PROCESS

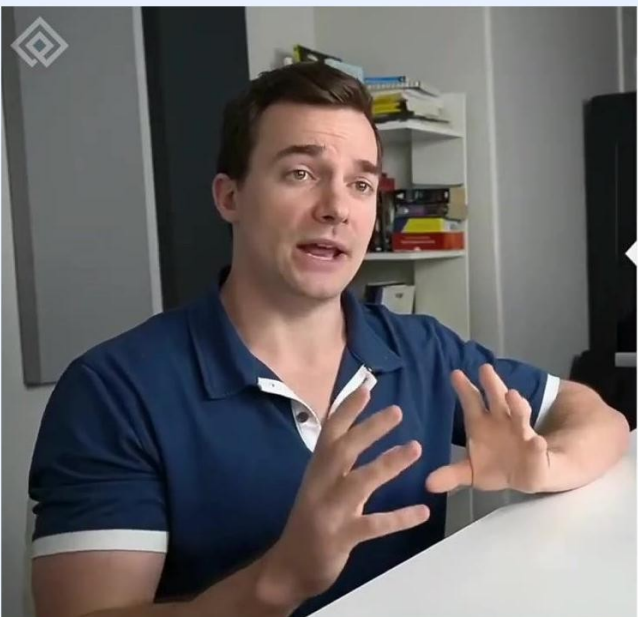
Short presentations on working
environment

Email setup for new employee

Create work schedules

Inform organization about
new employee

Slide repeating the pre-onboarding process items, with emphasis on informing the organization about the new employee before their arrival.



PRE-ONBOARDING PROCESS

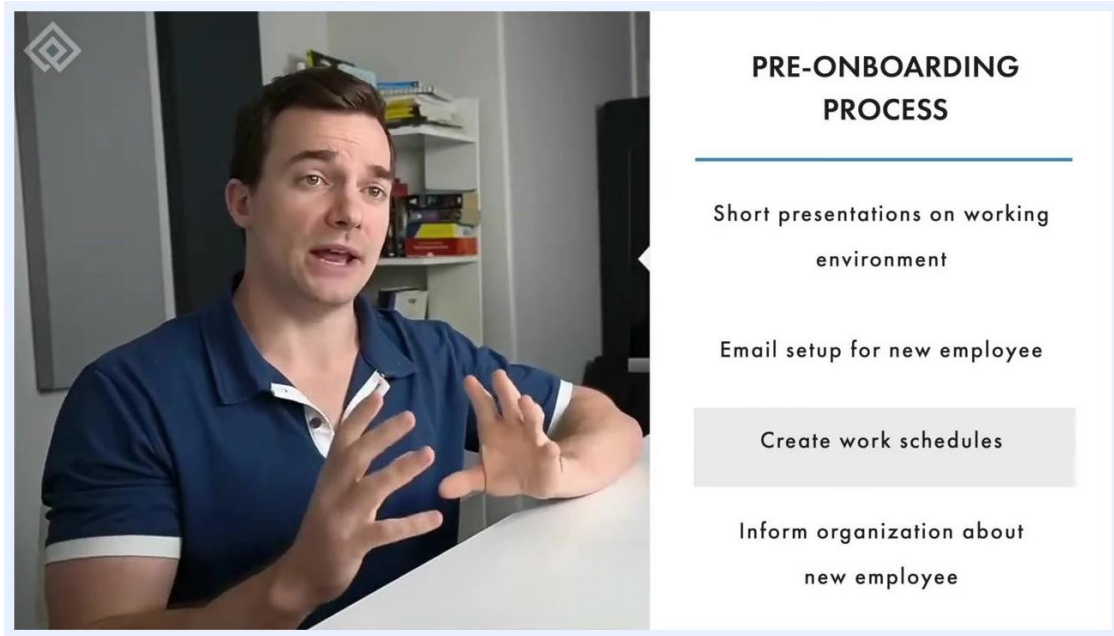
Short presentations on working
environment

Email setup for new employee

Create work schedules

Inform organization about
new employee

Slide listing desk organization, reassessing employee requirements, and company-branded material as preboarding tasks before the first day.



Slide highlighting company-branded welcome material as part of the preboarding checklist.

First Day Agenda

Keep the first day simple yet effective, and avoid overwhelming the new hire with too much information or too many tasks.

Structure the first day around the following:

- Celebrate the new employee's first day: Show appreciation with a small gesture, such as a welcome email that includes executives or stakeholders and introduces the new hire to the team. A party is not necessary; a thoughtful message or small token is sufficient.
- Familiarize the new employee with the workplace: Provide a company tour, introducing the new hire to key areas and colleagues, and explain the working climate and company culture as you go.
- Offer training and explain access to resources: Show the new employee how to access company systems and where to find training materials, and explain where and how training opportunities are provided.
- Discuss employee rights and company benefits: Clearly explain the employee's rights, company policies, and available benefits such as medical insurance, company protection, leave, and other perks.

- Let the first day be an introduction: Avoid starting intensive onboarding tasks on the first day. Allow the new hire to settle in, meet colleagues, and get comfortable before beginning formal onboarding activities on day two.



THE FIRST DAY

Celebrate their first day

Company tour and work familiarization

Offer training

Employee's rights and bounds to the company.

Let the first day be the first

Slide listing desk organization, reassessing employee requirements, and company-branded material, framed around keeping the first day simple and effective.



THE FIRST DAY

Celebrate their first day

Company tour and work familiarization

Offer training

Employee's rights and bounds to the company.

Let the first day be the first

Slide listing celebrating the first day, company tour and work familiarization, offering training, employee rights and company obligations, and letting the first day be the first.



THE FIRST DAY

Celebrate their first day

Company tour and work familiarization

Offer training

Employee's rights and bounds to the company.

Let the first day be the first

Slide highlighting the company tour and work familiarization step of the first day agenda.



THE FIRST DAY

Celebrate their first day

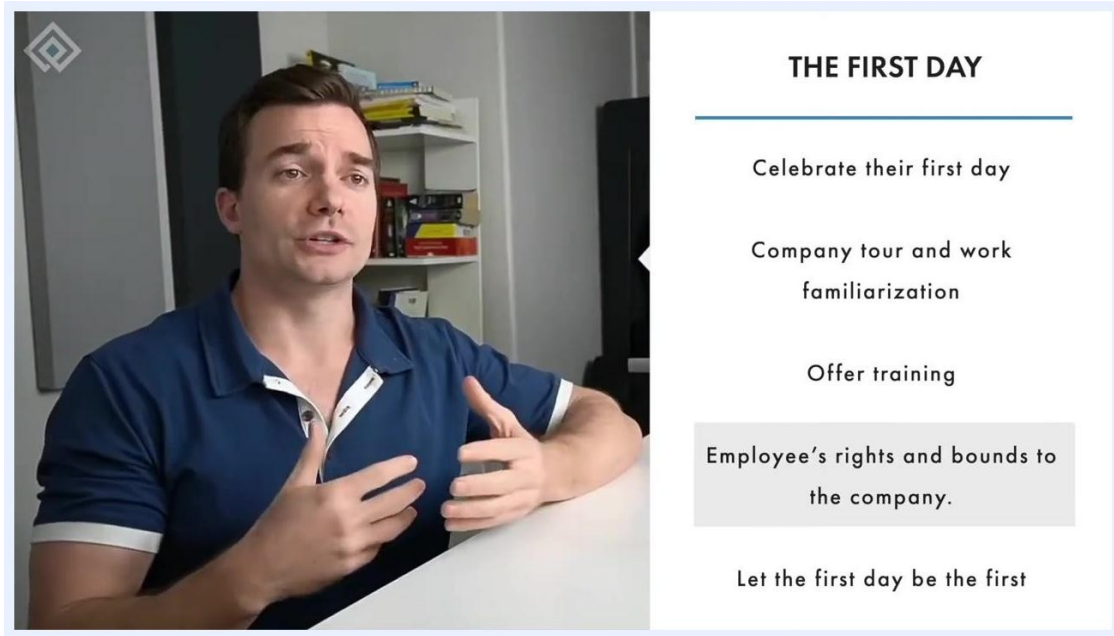
Company tour and work familiarization

Offer training

Employee's rights and bounds to the company.

Let the first day be the first

Slide highlighting the training step of the first day agenda.



THE FIRST DAY

- Celebrate their first day
- Company tour and work familiarization
- Offer training
- Employee's rights and bounds to the company.
- Let the first day be the first

Slide highlighting employee rights and company obligations as part of the first day agenda.

Begin the formal onboarding process on day two by moving beyond introductions and initial familiarization, and start structured onboarding activities that continue throughout the employee's first week.

First Week Plan

During the first week, allow the new employee to showcase their skills, manage the employee's schedule efficiently to ensure smooth integration, and monitor the employee's development consistently throughout the week.



**EMPLOYEE'S
FIRST WEEK**

Employee showcase
their skills

Manage employees
schedule efficiently

Monitor their
development

Slide titled "Employee's First Week" with the schedule-management step highlighted.

Keep up the momentum by regularly monitoring the employee's development, but avoid being invasive. Check in with the employee periodically to ensure they are keeping up with their daily obligations, and encourage them to feel comfortable and supported in their new role.



**EMPLOYEE'S
FIRST WEEK**

Employee showcase
their skills

Manage employees
schedule efficiently

Monitor their
development

Slide titled "Employee's First Week" listing letting the employee showcase their skills, managing the employee's schedule efficiently, and monitoring their development.

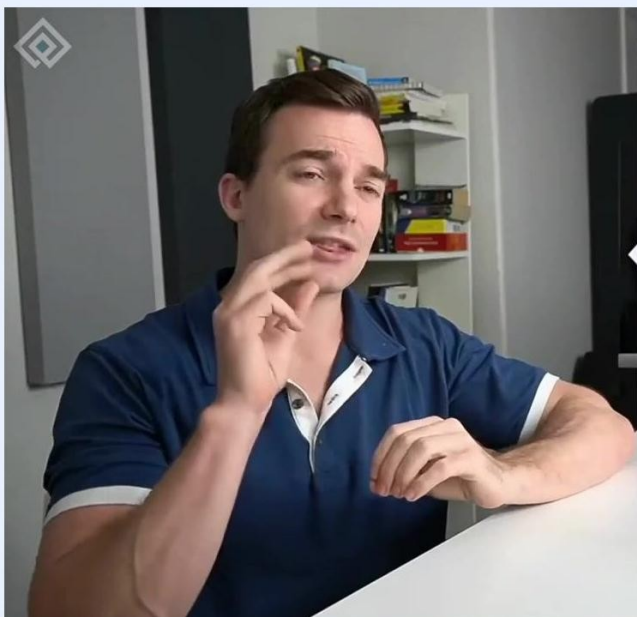
New employees will try to impress you during their first week. Perform timely checks on the employee, but do not micromanage, and ensure the employee has the freedom to discuss any issues openly.



EMPLOYEE'S FIRST WEEK - TIPS

- Employee try to impress you
- Timely checks on employee
- Freedom of speech to discuss issues

Slide titled "Employee's First Week - Tips" with the point about employees trying to impress you highlighted.



THE NEWBIE'S GRACE PERIOD

- Grace period lasts for months
- Integrate with company's culture
- Enough time for employee to settle
- Employee's performance evaluation
- Include the 30-60-90 scheme

Slide highlighting the importance of timely checks on the employee to track progress.

Also build the following into the first-week plan:

- Schedule regular check-ins: Arrange daily or frequent meetings with the new employee to address questions, provide feedback, and ensure they feel supported.
- Assign a mentor or onboarding buddy: Pair the new hire with an experienced team member who can offer guidance, answer questions, and help them acclimate to the workplace.
- Set clear expectations and goals for the first week: Communicate what the new employee should aim to accomplish by the end of their first week, and outline any required training modules, introductory projects, or meetings they should attend.



THE FINAL STAGE

- Onboarding lasts for a year
- Discuss practical matters
- Discuss employee's progress
- Discuss their future visions and aspirations
- Discuss their experience within your company
- Open access to job thriving knowledge
- Provide additional training

The presenter smiles and gestures, with a lower-third overlay reading "QUESTION | ANSWER IN COMMENT". The office background remains the same.

30/60/90 Day Goals

After the first week, the "newbie's grace period" begins and lasts several months. Guide the employee to integrate with the company's culture, allow enough time for the employee to settle into their new role, and conduct regular performance evaluations during this period. Include the 30-60-90 day scheme in the onboarding plan.



THE NEWBIE'S GRACE PERIOD

- Grace period lasts for months
- Integrate with company's culture**
- Enough time for employee to settle
- Employee's performance evaluation
- Include the 30-60-90 scheme

Slide titled "The Newbie's Grace Period" with integrating with the company's culture highlighted.



THE NEWBIE'S GRACE PERIOD - 30 DAYS

- Employee handle professional obstacle**
- Tasks assigned must be purposefully
- Checks on your employee
- Give them feedbacks
- Progress tracking from third person's eye
- Keep balance between the new hire and old employees
- Participate in team building activities

Slide highlighting the need to give the employee enough time to settle into the company environment.

Set predetermined plans and goals that are compatible with the time frame and the job description, and evaluate the employee's performance based on these goals.

30 days: Assign tasks that allow the employee to handle professional obstacles, and ensure tasks assigned are purposeful and relevant to the role, not simply imposed to test them. Perform regular checks on the employee's progress, provide constructive feedback, track progress from a third-person perspective for objectivity, maintain a balance between the new hire and existing employees, and encourage participation in team-building activities to foster integration.



THE NEWBIE'S GRACE PERIOD - 30 DAYS

Employee handle
professional obstacle

Tasks assigned must be purposefully

Checks on your employee

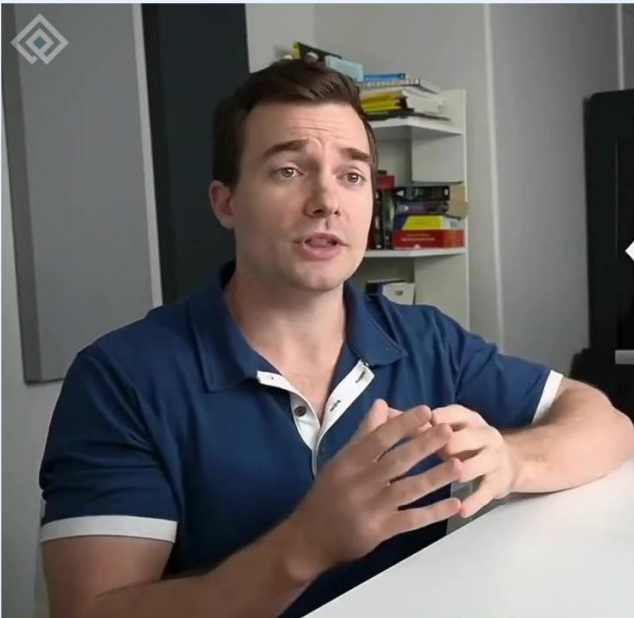
Give them feedbacks

Progress tracking from third
person's eye

Keep balance between the new hire
and old employees

Participate in team
building activities

Slide titled "The Newbie's Grace Period - 30 Days" with handling professional obstacles highlighted.



THE NEWBIE'S GRACE PERIOD - 30 DAYS

Employee handle
professional obstacle

Tasks assigned must be purposefully

Checks on your employee

Give them feedbacks

Progress tracking from third
person's eye

Keep balance between the new hire
and old employees

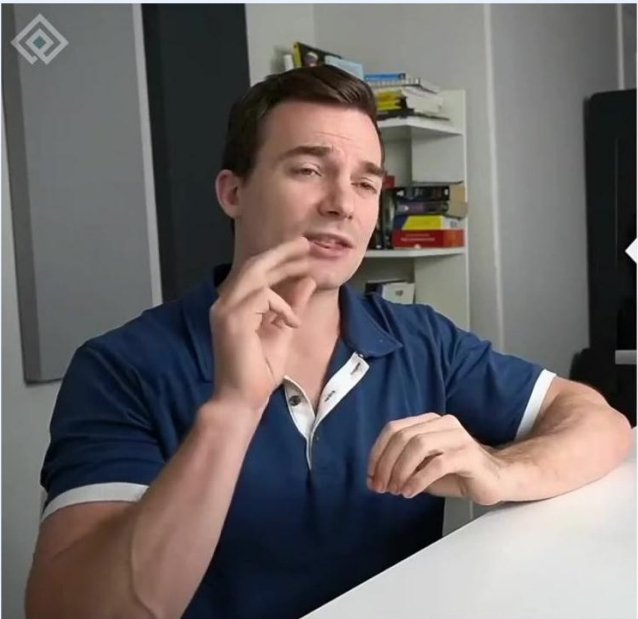
Participate in team
building activities

Slide highlighting that tasks assigned must be purposeful.

Use the following methods to observe progress during the 30-day period:

- Assign tasks to the new employee that are purposeful and relevant to their role.
- Regularly check on the employee to monitor their adaptation and progress.
- Provide feedback to the employee, ensuring it is constructive and relevant.
- Track the employee's progress from a third-person perspective to maintain objectivity.
- Maintain a balance between the new hire and existing employees to foster inclusion.

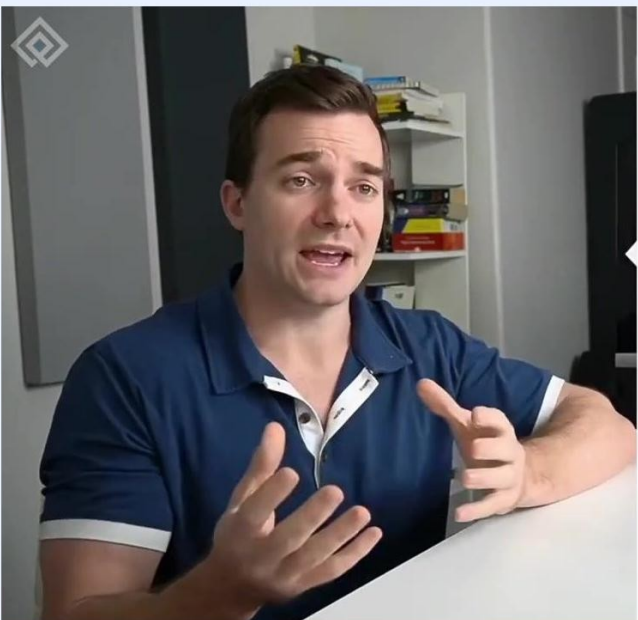
- Encourage participation in team-building activities to support integration and motivation.



THE NEWBIE'S GRACE PERIOD

- Grace period lasts for months
- Integrate with company's culture
- Enough time for employee to settle
- Employee's performance evaluation
- Include the 30-60-90 scheme

Slide highlighting freedom of speech, allowing the employee to discuss issues without hesitation.



THE NEWBIE'S GRACE PERIOD - 30 DAYS

- Employee handle professional obstacle
- Tasks assigned must be purposefully
- Checks on your employee
- Give them feedbacks
- Progress tracking from third person's eye
- Keep balance between the new hire and old employees
- Participate in team building activities

Slide listing all observation steps for the first 30 days, with the point about purposeful tasks highlighted.

Feedback from the employee is extremely beneficial for both the company and the employee's development, so set a strong foundation early by encouraging open communication.

Deliver feedback that is constructive and relevant to the employee's role and performance, and avoid vague or generic feedback – be specific and actionable.



**THE NEWBIE'S
GRACE PERIOD - 30 DAYS**

- Employee handle professional obstacle
- Tasks assigned must be purposefully
- Checks on your employee
- Give them feedbacks**
- Progress tracking from third person's eye
- Keep balance between the new hire and old employees
- Participate in team building activities

Slide highlighting the step to give the employee feedback.

Track progress from a third-person perspective to ensure an objective point of view.

Ensure the new employee does not feel left out of the group by maintaining a balance between new hires and existing employees, and promote participation in team-building activities to improve motivation and team spirit.



**THE NEWBIE'S
GRACE PERIOD - 30 DAYS**

- Employee handle professional obstacle
- Tasks assigned must be purposefully
- Checks on your employee
- Give them feedbacks
- Progress tracking from third person's eye
- Keep balance between the new hire and old employees
- Participate in team building activities

Slide highlighting the need to keep balance between the new hire and existing employees.

Recognize that the new employee is adapting to your work culture, and provide support throughout this process.

60 days (fourth month): During the initial period of the fourth month, boost the goals the employee needs to accomplish, ensuring they fit together and are not imposed arbitrarily. In the last period of the grace trimester, ensure the new employee meets all previously agreed-upon goals; once these goals are met, set new objectives for the final part of the onboarding process, taking into account the employee's progress, integration, and readiness for new challenges.



THE NEWBIE'S GRACE PERIOD - 30 DAYS

- Employee handle professional obstacle
- Tasks assigned must be purposefully
- Checks on your employee
- Give them feedbacks
- Progress tracking from third person's eye
- Keep balance between the new hire and old employees

Participate in team building activities

Presenter at desk, HR UNIVERSITY logo on monitor, discussing boosting goals during the grace period

90 days (last period of the grace trimester): Set attainable and well-crafted performance goals for the employee, ensuring they are realistic, clearly defined, and aligned with the employee's role and company objectives.

Discuss the employee's current performance, reviewing achievements and areas for improvement, and propose further training if necessary to help the employee reach higher goals.

Encourage team building within the company and employ working in pairs where possible, pairing the new employee with a colleague to foster knowledge sharing and support; this approach improves overall company performance and boosts team collaboration.

Beyond 90 days — the final stage: Onboarding typically lasts for a year, since a comprehensive onboarding process extends beyond the grace period and may take up to a year depending on the role's complexity.

During the final stage, discuss practical, day-to-day operational matters with the employee to ensure they are comfortable with all practical aspects of their role.

Review the employee's progress regularly, provide feedback, and set new development targets. Also discuss the employee's future visions and aspirations, engaging in conversations about career goals and long-term ambitions within the company.

Discuss the employee's experience within your company, soliciting feedback on their integration, satisfaction, and any challenges faced. Employees are the driving force of the company, so the onboarding environment should remain welcoming, with a focus on open communication and support throughout this final stage.



THE FIRST DAY

- Celebrate their first day
- Company tour and work familiarization
- Offer training
- Employee's rights and bounds to the company.

Let the first day be the first

Summary slide recapping all first day steps: celebrating the day, company tour, offering training, discussing rights and benefits, and keeping the day as an introduction.

Provide open access to knowledge that helps employees thrive in their job.

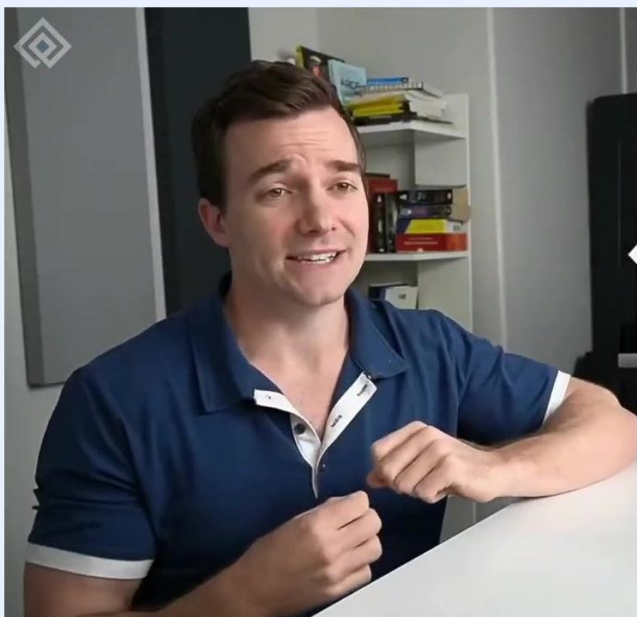
Offer additional training as needed to support ongoing development; be proactive in identifying training needs and making resources available, since this support is crucial during the first year to encourage retention and engagement.



**THE NEWBIE'S
GRACE PERIOD - 30 DAYS**

- Employee handle professional obstacle
- Tasks assigned must be purposefully
- Checks on your employee
- Give them feedbacks
- Progress tracking from third person's eye**
- Keep balance between the new hire and old employees
- Participate in team building activities

Slide highlighting progress tracking from a third-person perspective.



**THE NEWBIE'S
GRACE PERIOD - 30 DAYS**

- Employee handle professional obstacle
- Tasks assigned must be purposefully
- Checks on your employee
- Give them feedbacks
- Progress tracking from third person's eye
- Keep balance between the new hire and old employees
- Participate in team building activities**

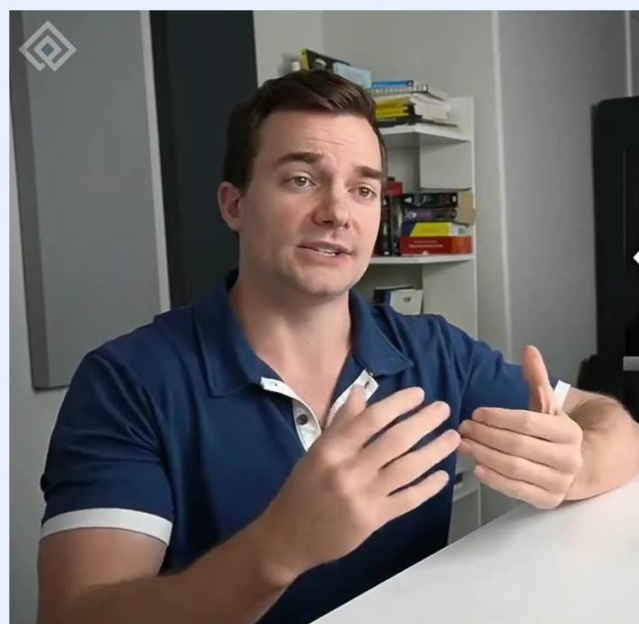
Slide highlighting participation in team-building activities.



THE NEWBIE'S GRACE PERIOD - 30 DAYS

- Employee handle professional obstacle
- Tasks assigned must be purposefully
- Checks on your employee
- Give them feedbacks
- Progress tracking from third person's eye
- Keep balance between the new hire and old employees
- Participate in team building activities

Slide titled "Last Period of the Grace Trimester" with space reserved for new objectives.



LAST PERIOD OF THE GRACE TRIMESTER

- Set attainable and well-crafted performance goals
- Discuss the employee's current performance
- Encourage team building within the company
- Employ working in pairs if possible

Slide titled "Last Period of the Grace Trimester" listing setting attainable and well-crafted performance goals.



LAST PERIOD OF THE GRACE TRIMESTER

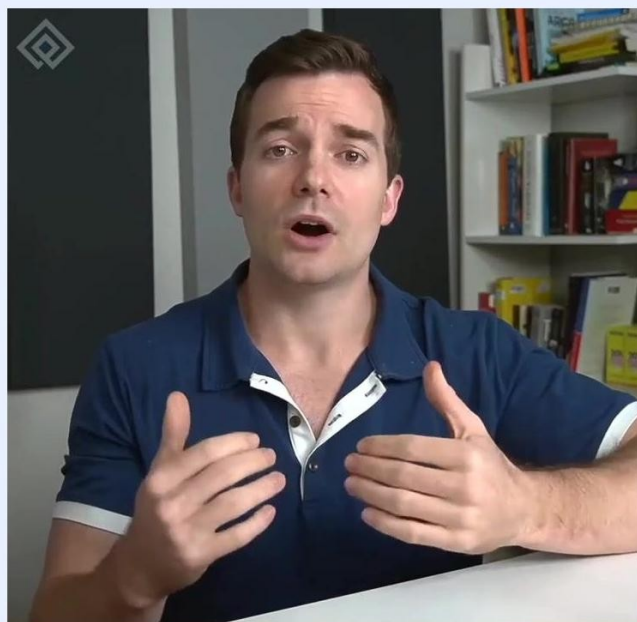
Set attainable and well-crafted
performance goals

Discuss the employee's
current performance

Encourage team building
within the company

Employ working in pairs if possible

Slide highlighting the step to discuss the employee's current performance.



THE FINAL STAGE

Onboarding lasts for a year

Discuss practical matters

Discuss employee's progress

Discuss their future visions and
aspirations

Discuss their experience within
your company

Open access to job thriving
knowledge

Provide additional training

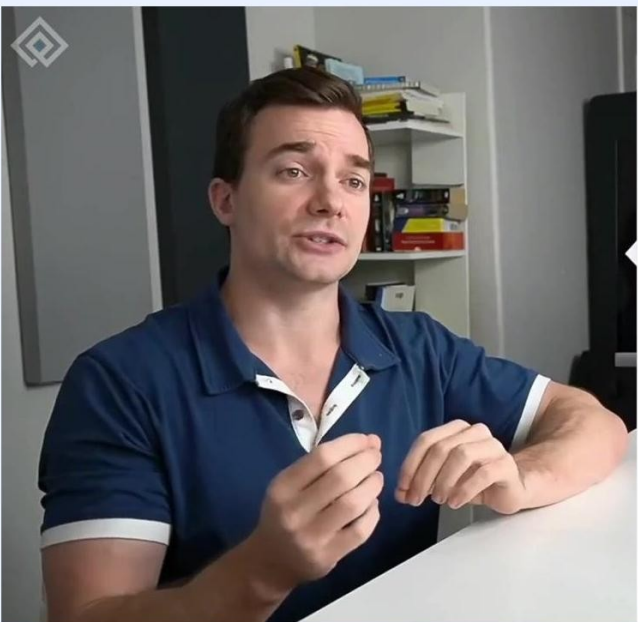
Slide highlighting the step to employ working in pairs where possible.



THE FINAL STAGE

- Onboarding lasts for a year
- Discuss practical matters
- Discuss employee's progress
- Discuss their future visions and aspirations
- Discuss their experience within your company
- Open access to job thriving knowledge
- Provide additional training

Slide titled "The Final Stage" highlighting that onboarding lasts for a year.



THE FINAL STAGE

- Onboarding lasts for a year
- Discuss practical matters
- Discuss employee's progress
- Discuss their future visions and aspirations
- Discuss their experience within your company
- Open access to job thriving knowledge
- Provide additional training

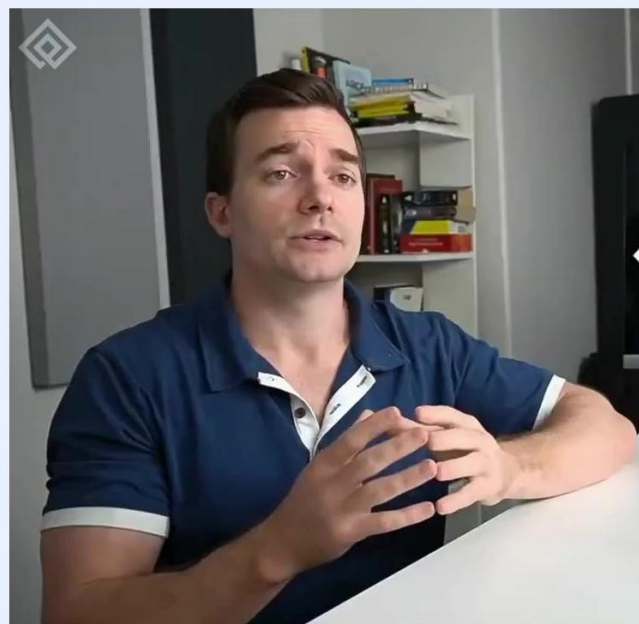
Slide highlighting the step to discuss practical matters with the employee.



THE FINAL STAGE

- Onboarding lasts for a year
- Discuss practical matters
- Discuss employee's progress
- Discuss their future visions and aspirations
- Discuss their experience within your company
- Open access to job thriving knowledge
- Provide additional training

Slide highlighting the step to discuss the employee's future visions and aspirations.



THE FINAL STAGE

- Onboarding lasts for a year
- Discuss practical matters
- Discuss employee's progress
- Discuss their future visions and aspirations
- Discuss their experience within your company
- Open access to job thriving knowledge
- Provide additional training

Slide listing the final-stage onboarding steps with the future visions and aspirations item highlighted.



THE FINAL STAGE

Onboarding lasts for a year

Discuss practical matters

Discuss employee's progress

Discuss their future visions and aspirations

Discuss their experience within your company

Open access to job thriving knowledge

Provide additional training

Slide titled "The Final Stage" listing onboarding lasting a year, discussing practical matters, discussing progress, discussing future visions and aspirations, and discussing the employee's experience within the company, which is highlighted.

Systems and Access

Before the employee's first day, HR should set up a professional email account for the new employee and provide access to necessary company systems, cloud computing software, and any platforms required for their role, so the new hire can access important documents and resources ahead of starting. Also allow the new employee to review previous projects and company materials so they can learn about the organization's operations before day one.



**THE NEWBIE'S
GRACE PERIOD - 30 DAYS**

- Employee handle professional obstacle
- Tasks assigned must be purposefully
- Checks on your employee
- Give them feedbacks
- Progress tracking from third person's eye
- Keep balance between the new hire and old employees
- Participate in team building activities

Slide highlighting participation in team-building activities as support for cultural integration.

This section of your checklist should list each specific tool and permission required for the role, along with the system owner responsible for granting access and the due date for setup, so that access is confirmed before the employee arrives.



THE FINAL STAGE

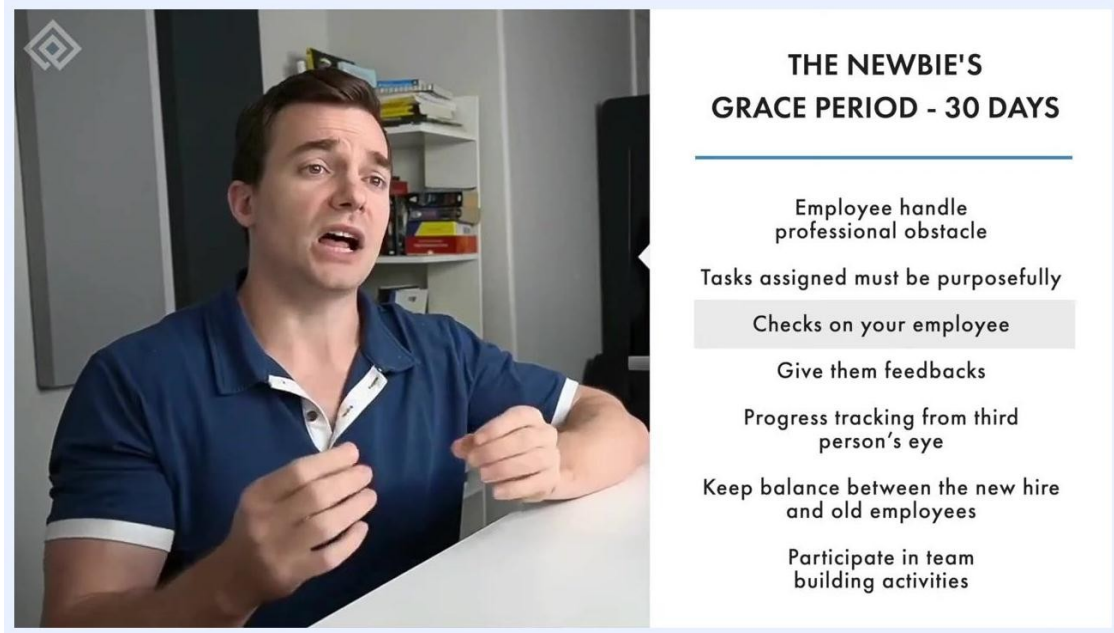
- Onboarding lasts for a year
- Discuss practical matters
- Discuss employee's progress
- Discuss their future visions and aspirations
- Discuss their experience within your company
- Open access to job thriving knowledge
- Provide additional training

Slide highlighting open access to job-thriving knowledge as part of the final stage.

Check-ins and Feedback

Build a cadence of regular check-ins throughout onboarding. During the first week, schedule daily or frequent meetings with the new employee to address questions, provide feedback, and ensure they feel supported, and pair them with a mentor or onboarding buddy who can offer guidance and help them acclimate.

During the grace period, perform regular checks on the employee's progress, provide constructive and specific feedback, and track progress from a third-person perspective to maintain objectivity. Feedback from the employee is equally valuable to the company and should be actively encouraged, since it helps set a strong foundation for open communication.



**THE NEWBIE'S
GRACE PERIOD - 30 DAYS**

- Employee handle professional obstacle
- Tasks assigned must be purposefully
- Checks on your employee**
- Give them feedbacks
- Progress tracking from third person's eye
- Keep balance between the new hire and old employees
- Participate in team building activities

Slide highlighting the importance of checks on the employee.

At each milestone — 30 days, 60 days, and 90 days — review whether predetermined goals have been met and set new objectives that reflect the employee's progress, integration, and readiness for new challenges. In the final stage of onboarding, continue regular progress reviews and discussions about the employee's experience, future aspirations, and any additional training needs, since this support is crucial for retention and engagement throughout the employee's first year.



THE NEWBIE'S GRACE PERIOD - 30 DAYS

- Employee handle professional obstacle
- Tasks assigned must be purposefully
- Checks on your employee
- Give them feedbacks
- Progress tracking from third person's eye
- Keep balance between the new hire and old employees
- Participate in team building activities

Slide highlighting employee performance evaluation as part of the grace period.



THE FINAL STAGE

- Onboarding lasts for a year
- Discuss practical matters
- Discuss employee's progress
- Discuss their future visions and aspirations
- Discuss their experience within your company
- Open access to job thriving knowledge
- Provide additional training

Slide highlighting the step to provide additional training as part of the final stage.

Engage with your employees from day one by asking yourself how you would treat your employee on their first day at the job, and carry that same level of attentiveness through every check-in that follows.



A white screen with the HR University logo and the text "HUMAN RESOURCES TRAINING AND COMMUNITY" and "HR.UNIVERSITY" below.