



Freshteam's New Employee Onboarding Checklist





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HR Onboarding Checklist

- Start the Welcome Email Journey for the employee that would include pre-onboarding instructions such as a Thank you for accepting the offer, their joining date, introducing the manager, sending in company materials and also details about the first day, 30th day, etc.,
- Inform the Manager and all the Panel Members of the Interview Process of the candidate's acceptance
- Prepare the paperwork and documents required for the new employee
- Send out the paperwork required to complete the joining formalities
- Remind the new hire to complete the paperwork via email
- Email the new employee a day before Day 1 giving necessary guidelines, instructions, and help materials
- Introduce the employee to the onboarding buddy assigned by the Manager.
- Remind the Manager of the New Employee to send out a welcome message with all employees to announce the arrival of a new team member.
- Give them their Orientation Schedule
- Ensure he/she finishes any other paperwork you required them to do on their first day



- ❑ Plan the Office Walk-through and also show them the necessary places like the cafeteria, IT Bay, HR Bay, Restrooms, Parking Space, Nap Room, Play Area, etc.,
- ❑ Make sure they visit their work station and drop a Hi to their Team
- ❑ Clarify any doubts they have and give them instructions for the next day
- ❑ Setup Culture Meetings and Company Policy/ Business Goal Sessions
- ❑ Create Employee Profile and update all information and give them credentials to your Employee Database Management and HR Software so that they can self-service for all future needs.
- ❑ Set up a time to meet them and address any of their concerns by the end of Week 1, 30th day, 60th day, and 90th day.
- ❑ Collect Feedback by the end of it based on which you can improve the process.



Admin Onboarding Checklist

- ❑ Collect Information from the HR team on the employee and put out a gate pass for them to access on their Day 1

- ❑ Send out instructions to the new hire to get to the office and to enter the premises without hassle.

- ❑ Prepare a clean workstation with the necessary equipment by collaborating with the IT team.

- ❑ Give the Employee a bunch of welcome goodies like a T-shirt, Laptop Bag, Water Bottle, Notepad, Pen, and other company goodies like a Mobile Phone Holder with Logo.

- ❑ Give the new hire his Employee Identification Card, Access Card, Parking details, cab details, etc.,



IT Onboarding Checklist

- ❑ Get New Employee Information from HR and set up all necessary accounts, create email id, and set up devices for them to be handed over on Day 1.
- ❑ Add the employee to any portal as required and give the credentials along with reset instructions for completing pre onboarding activities.
- ❑ Hand over the device, workstation requirements such as equipment or software and help them in installing them and ensure they have a working system in place.
- ❑ Give them a dedicated Slack Name or Mail ID to contact when they face any issues.
- ❑ Educate them with all privacy and security guidelines before they begin work.
- ❑ Collect Feedback by the end of it based on which you can improve the process.



Manager/Team Onboarding Checklist

- Email the New Hire after they accept the offer to congratulate and welcome them.
- Inform a suitable date you would want the new hire to join to the HR and confirm the same.
- Assign a buddy from your team for the new hire to help during the onboarding process.
- Catchup with the New Hire before Day 1 to instruct on any requirements you need and to explain their roles and goals.
- Send out a welcome email to the team with the new employee on loop, introducing them to the team and all the people they need to catch up with.
- Have the new employee meet up with important business heads of the organization that is required for their role.
- Introduce them to your organization's learning management system to complete the necessary courses before they start work.
- Urge the employee to go out on coffee dates with his/her team members to foster team building.
- Get a personal introduction of the employee from him/her and send it to the team to help them know her better.



- ❑ Set up a 1-1 with the employee after one week to understand their comfort and requirements from the role and to discuss goals.
- ❑ Check up again on the 30th, 60th, and 90th day to understand how the employee feels and to tweak things accordingly.
- ❑ Collect Feedback by the end of it based on which you can improve the process.



Voila! Your checklist is ready, print it out, check things as you go or if you want to automate the entire process, you need a good [onboarding software](#) with checklists, this is where software like Freshteam saves your day.

Wondering how it works? Let us show you how - [Request a Demo](#)

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