



# **Freshteam's New Employee Onboarding Checklist**





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## Pre Onboarding Checklist

- ☐ Send a Thank you Email after they accept the offer
- ☐ Inform the Manager and all the Panel Members of the Interview Process of the candidate's acceptance
- ☐ Setup a tentative joining date
- ☐ Confirm the date with the new hire's manager, and team
- ☐ Email the new hire informing the joining date for confirmation
- ☐ 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
- ☐ Introduce the New Employee to his/her Manager via email
- ☐ Send out company communications and learning materials required for the role
- ☐ Inform the IT team to set up a new device, and all necessary permissions and credentials ready.
- ☐ Inform the Admin Team to keep ready a workstation
- ☐ Email the new employee about their first day with necessary guidelines, instructions, and help materials



- ❑ Assign an onboarding buddy for the new employee and introduce them to each other before Day 1.
- ❑ 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.



## First Day Checklist

- ☐ Ensure the employee reaches your office with no hassle
- ☐ Inform Security and provide permission to enter the premises
- ☐ 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 them their Orientation Schedule and introduce them to their Buddy to guide them
- ☐ Arrange a lunch date for the new employee with his/her manager/buddy as per availability
- ☐ 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.,
- ☐ Ensure they collect their working device and other required equipment/software from the IT Team
- ☐ 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



## First Week Checklist

- ☐ Arrange for Culture Meetings and Company Policy/ Business Goal Sessions
- ☐ Have the new employee meet up with important business heads of the organization
- ☐ Set up a 1-1 with the employee and his/her manager
- ☐ 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.
- ☐ Have the manager or mentor of the employee set them goals and start assigning work/courses/assignments as required.
- ☐ Introduce them to your organization's [learning management system](#) to complete the necessary courses before they start work.
- ☐ Set up a time to meet them and address any of their concerns by the end of Week 1.



## The Post-Onboarding Checklist

### 30th Day

- ☐ Set Up a 1-1 with the New employee asking for their feedback on the onboarding process, their team, and their manager
- ☐ Also, ensure to go through the goals and assignments they are going to work on
- ☐ Have an open talk about what they exactly feel and communicate it right to their managers.
- ☐ Set Up a 1-1 with the new employee's manager to get his/her feedback on the employee as well
- ☐ Make a general assessment of the new employee
- ☐ Plan the revised goal and work approach with the manager and the employee based on the feedback received.

### 60th Day

- ☐ Set Up a 1-1 to see how the employee liked the changed approach or how the existing approach has been after two months
- ☐ Set Up a 1-1 with the new employee's manager to get his/her feedback on the employee and also on the alignment based on the last meeting



- ❑ Plan the revised goal and work approach with the manager and the employee based on the feedback received.
- ❑ Make a general assessment of the new employee
- ❑ If the employee thinks they fit for some other team or role, work on solving the challenge

## 90th Day

- ❑ Send out a satisfaction survey to the employee on their onboarding, their job, their time at the company so far, and their manager and team. Include questions on if they are learning new things in this role and if they find it challenging etc.,
- ❑ Set Up a 1-1 based on the survey response to employees who are mostly dissatisfactory.
- ❑ Communicate the results to their manager for all new employees to help the manager better understand the employee's mindset and progress accordingly.
- ❑ Ask if the employee wants a meeting and set up to discuss any queries they may have.
- ❑ Based on the collective feedback, implement changes in your onboarding plan.



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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