

Universal Onboarding Checklist

Matched to Module 3: Creating a Positive Onboarding Experience

This tool provides a comprehensive, adaptable onboarding checklist that can be used as a foundation for any role in the organization, ensuring a consistent and thorough onboarding experience for all new hires.

Instructions for HR and Managers:

1. Review the checklist and customize it for your organization's specific needs.
2. Add or remove items based on the specific role and department.
3. Assign responsible parties for each task (e.g., HR, direct manager, IT department).
4. Use this checklist to track progress throughout the onboarding process.
5. Regularly review and update the checklist based on new hire feedback and organizational changes.
6. Ensure all parties involved in onboarding have access to and understand their responsibilities in the process.
7. Consider creating a digital version of this checklist for easier tracking and collaboration.

This universal onboarding checklist provides a comprehensive framework that can be adapted for any role within an organization. It covers the essential elements of onboarding while allowing for customization to meet specific departmental or role-based needs. By using this standardized approach, organizations can ensure a consistent and thorough onboarding experience for all new hires, regardless of their position.

Universal Onboarding Checklist

Employee Name

Role

Start Date

Manager

Pre-boarding Phase:

- Send welcome email with first-day instructions
- Prepare workstation (physical or virtual)
- Set up necessary accounts and system access
- Send new hire paperwork for review
- Inform team of new hire's start date

First Day:

- Welcome meeting with direct manager
- Company overview and culture introduction
- Office tour or virtual workspace orientation
- Introduction to immediate team members
- Review first-week schedule
- Complete any remaining new hire paperwork
- Provide employee handbook and key policies

First Week:

- IT systems training and setup
- Review of job description and expectations
- Introduction to key stakeholders and departments
- Overview of products/services
- Health and safety briefing
- Assign a buddy or mentor
- Set up regular check-ins with manager

First Month:

- Complete mandatory company-wide training
- Begin role-specific training
- Set initial performance goals
- Provide overview of performance review process
- Introduction to company social groups or activities
- Gather initial feedback on onboarding experience

30-60-90 Day Plan:

- 30-day check-in with manager
- 60-day performance discussion
- 90-day review and goal setting for next quarter

Role-Specific Items:

- _____
- _____
- _____

Department-Specific Items:

- _____
- _____
- _____

Additional Resources to Provide:

- Organization chart
- Company mission and values statement
- Employee benefits information
- Professional development opportunities
- Internal communication channels guide

Onboarding Experience Feedback:

- 1-week check-in
- 1-month survey
- 90-day comprehensive feedback

Post-Onboarding:

- Schedule any additional training needed
- Ensure all systems and tools are working properly
- Confirm understanding of role and expectations
- Address any outstanding questions or concerns