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7-Step onboarding checklist

Onboarding a new hire is a collaborative process between a manager and their team. Ensure that your new employee is set up for success with the information they need and the social integration they deserve. Get your whole team involved in the process, be sure to check in often, and ask for feedback along the way! A warm welcome and a thorough onboarding goes a long way when it comes to retention, engagement and overall performance.

Item	Action	Purpose	Tips
Prepare the team	• Hold a team meeting with your employees to address any questions they may have about their new colleague's role and how it might affect their own roles and responsibilities.	• To ensure a smooth transition, take the time to address any resistance or questions early on to avoid tension between the team and the new employee. • Since the onboarding is up to the whole team, ensure everyone is on the same, positive page.	• Ask your team to reflect on their first day (what worked well and how it could have been better) and use that to create a better experience for their new colleague.
Have a first 1-on-1	• Explain how the onboarding process works and how long it will be (we suggest two weeks before jumping in on projects). • Go over pertinent company information: culture guidelines, company vision and goals, organizational and team objectives. • Let them know that if anything is unclear, they should never hesitate to ask.	• This 1-on-1 time will help you set the foundation for your relationship going forward. Demonstrating empathy and patience from day 1 will help them be open with you if they are struggling.	• Do not panic if you don't have all the answers to their questions. Be honest and get back to them later or redirect them to someone (an HR person) who would know the answer.
Equip them with tools & resources	• Double check that they have been given the tools they need to do their job (computer, access to databases, email address, etc.) • Offer them a list of any additional readings, trainings, certifications or resources you feel are pertinent. Ask your employees to help assemble this list.	• The more clarity and knowledge they have from the start, the more confident they will be when they start contributing on the team.	• Prepare a thorough checklist for them to follow, so they can check off what they have done as they go and see their progress.

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Have them meet the team	• Have the new employee meet the team in a less formal setting (a fun breakfast or a lunch outing) to get to know one another. • Ask each team member to set up 1-on-1 time with the new employee to keep solidifying their social integration.	• Getting to the know their colleagues as people and not just employees will help ease them in to the social aspect of the job and build positive team dynamics.	• Involve your team in planning this first event! The final result will be a more authentic meeting that reflects the spirit of the team.
Assign them an onboarding buddy	• To help the new employee tackle any learning curves, assign them one or several onboarding "buddies": key people to reach out to when they have questions on different aspects of the job.	• Trust that your team can teach them what they do best. This will allow team bonds to form more rapidly and let you attend to your other managerial responsibilities.	• Frame becoming an onboarding buddy to your employees as an opportunity to develop their mentoring, coaching and leadership skills.
Check in frequently	• Find time to chat with your new employee daily in the first week, and then at least once a week during the following month. Be sure to ask how it's been going, and prompt them to ask questions or raise any concerns they may have.	• New hires might shy away from asking too many questions at first in fear of not seeming resourceful. Scheduling a set time to connect and have candid discussions signals that it's safe to ask questions.	• Try scheduling a regular 15 min. coffee chat or video call (if you're remote) with your new employee and adapt the format as you go.
Have a first formal feedback discussion	• Book a more formal feedback session with your new hire at the end of the first month. • Prior to the conversation, ask them to reflect on what went well, and where they feel they are struggling. • Share your thoughts as well, using a strengths-based approach to feedback so they maintain motivation.	• Creating a habit of communicating openly and frequently early on about anything from goals to team conflict will help build an authentic, solution-driven culture on your team.	• If there is a difficult conversation to be had, address it! The more you become accustomed to having tough talks, the easier they become.