First engagement

- ☐ Obtain signed job acceptance
- ☐ Confirm start date
- ☐ Send new employee welcome email

Prepare new hire paperwork

- ☐ Tax forms (i.e., W-4 or W-9)
- ☐ Employment contract
- ☐ Non-disclosure, non-compete or other legal documents
- ☐ Employee handbook
- ☐ Benefits literature
- ☐ Job description

Procure devices and equipment

- ☐ Computer (including keyboard, mouse, etc.)
- ☐ Phone
- ☐ Access to shared devices (printer, copier, fax machine, etc.)
- ☐ Mobile phone, tablet, or other additional job-specific devices

Set up accounts and create logins

☐ WiFi access

☐ Voicemail

☐ Email

☐ Time clock system

☐ Access to CRM, project management software, or other job-specific technology

☐ Put in request for security clearance (if applicable)

☐ Add employee to relevant email distribution lists

Set up workspace

☐ Reserve an office, cubicle or workstation

☐ Ensure space has a desk, chair or other necessary office furniture

☐ Provide necessary office supplies

☐ Provide a branded welcome kit (if applicable)

First day

☐ Greet new employee

☐ Provide card, badge or other security assets

☐ Perform building tour

☐ Introduce new hire to team

☐ Send new hire announcement email

☐ Schedule team lunch

☐ Provide training plan

Orientation

☐ Complete all remaining new hire paperwork

☐ Discuss benefits and insurance plans

☐ Review employee handbook

☐ Review safety policies

☐ Review technology policies and support process

☐ Assign a peer mentor

Schedule check-in plan

☐ Obtain onboarding feedback

☐ Schedule one-week check-in

☐ Schedule 30-day check-in

☐ Schedule 60-day check-in

☐ Schedule 90-day check-in