

Deliberate Onboarding Preparation Checklist

ADMINISTRATIVE- 5

	HAVE	DON'T HAVE
Organizational chart with photos & description of job	<input type="checkbox"/>	<input type="checkbox"/>
Email template announcing new hire	<input type="checkbox"/>	<input type="checkbox"/>
New hire "care package"	<input type="checkbox"/>	<input type="checkbox"/>
Prepare the receptionist	<input type="checkbox"/>	<input type="checkbox"/>
Get the office ready- desk, phone, computer, passwords	<input type="checkbox"/>	<input type="checkbox"/>

HUMAN RESOURCES- 7

Employee handbook	<input type="checkbox"/>	<input type="checkbox"/>
Policy and procedures manual	<input type="checkbox"/>	<input type="checkbox"/>
New hire paperwork system ready to go	<input type="checkbox"/>	<input type="checkbox"/>
Document career path for employee advancement	<input type="checkbox"/>	<input type="checkbox"/>
Document frequently asked questions	<input type="checkbox"/>	<input type="checkbox"/>
Easy to modify format for future improvement	<input type="checkbox"/>	<input type="checkbox"/>
Survey to deliver at conclusion of onboarding	<input type="checkbox"/>	<input type="checkbox"/>

DIRECT MANAGER- 18

Welcome Aboard letter from direct manager	<input type="checkbox"/>	<input type="checkbox"/>
Clear job description with expectations	<input type="checkbox"/>	<input type="checkbox"/>
Portfolio of expectations- 30-60-90 days	<input type="checkbox"/>	<input type="checkbox"/>
Task list to prepare for new hire day 1	<input type="checkbox"/>	<input type="checkbox"/>
Written agenda for week 1	<input type="checkbox"/>	<input type="checkbox"/>
Written agenda for week 2	<input type="checkbox"/>	<input type="checkbox"/>
Written agenda for week 3	<input type="checkbox"/>	<input type="checkbox"/>
Written objectives for week 4 - 12	<input type="checkbox"/>	<input type="checkbox"/>
End of Day Report format	<input type="checkbox"/>	<input type="checkbox"/>
Culture "Check In" format for conversation	<input type="checkbox"/>	<input type="checkbox"/>
Answers to Frequently Asked Questions	<input type="checkbox"/>	<input type="checkbox"/>
Quizzes to measure progress toward expectations	<input type="checkbox"/>	<input type="checkbox"/>
Demonstration of Appreciation of effort	<input type="checkbox"/>	<input type="checkbox"/>
Demonstration of Acknowledgement of result	<input type="checkbox"/>	<input type="checkbox"/>
Input from all departments relevant for new hire's role	<input type="checkbox"/>	<input type="checkbox"/>
Blend of self-directed and instructor led content	<input type="checkbox"/>	<input type="checkbox"/>
Content for training to deliver on portfolio of expectations	<input type="checkbox"/>	<input type="checkbox"/>
Reporting function to track progress or build case	<input type="checkbox"/>	<input type="checkbox"/>

CEO- 5

Welcome Aboard letter from CEO	<input type="checkbox"/>	<input type="checkbox"/>
Company Story/ History- video? In person?	<input type="checkbox"/>	<input type="checkbox"/>
Demonstration of Appreciation	<input type="checkbox"/>	<input type="checkbox"/>
Demonstration of Acknowledgement	<input type="checkbox"/>	<input type="checkbox"/>
This is what gets you a raise/ this is what gets you fired	<input type="checkbox"/>	<input type="checkbox"/>

CULTURE MENTOR- 5

5-10 connection building activities- sense of belonging	<input type="checkbox"/>	<input type="checkbox"/>
Demonstration of Values- statement & examples	<input type="checkbox"/>	<input type="checkbox"/>
List of conversations to have prior to day 1- dress/ lunch	<input type="checkbox"/>	<input type="checkbox"/>
Group of "culture mentors" or "onboarding buddies"	<input type="checkbox"/>	<input type="checkbox"/>
Deliberate experiences designed to communicate culture	<input type="checkbox"/>	<input type="checkbox"/>