

Employee Onboarding Checklist

Pre-Onboarding

- Contract signed, role confirmed
- Send welcome email with overview, mission and values
- Provide role description and expectations
- Provide access to essential documents
- Set up IT access (email, communications tools, ops systems, knowledge database)
- Share training resources, or any pre-readings
- Allocate a buddy/mentor
- Confirm equipment and software needs

Orientation & First Day

- Schedule intro call and 1st day meetings
- Further clarify vision, culture, and values
- Review role-specific priorities and short-term goals
- Walkthrough of business software/tools
- Clarify comms and meetings style
- Introduce to manager and broader team
- Explain feedback and performance review process

Integration & Support

- Meaningful introductions to broader network
- Explain communications channels and data management/compliance rules
- Schedule weekly coffee chats or lunch
- Provide regular recognition/feedback
- Record/address issues raised
- Arrange fun, casual team-building events
- Address wellbeing and/or flexibility support

Training & Development

- Assign initial projects/tasks with clear deadlines
- Arrange training sessions or shadowing
- Share templates, SOPs, workflows
- Schedule regular check-ins /1-1
- Encourage questions and clarifications
- Schedule check-in sessions with manager
- Address wellbeing and/or flexibility
- Discuss future collaborations and career growth possibilities

Review & Feedback

- Schedule periodic review meetings
- Share review documents prior to meeting
- Collect feedback on onboarding experience
- Identify and praise strengths and wins
- Identify and action areas for improvement
- Provide an approachable and supportive environment
- Update any onboarding materials and processes based on feedback (when applicable)

PRO-TIP:

- Explain and reinforce payment terms and payroll/invoicing procedures
- Confirm legal and tax compliance
- Review confidentiality, ethics, HR, cybersecurity and any relevant policies
- Provide main POC (point of contact)

Thoughts & Considerations

A checklist is a valuable starting point. It keeps things organized and provides a clear pathway for integrating your teams with confidence and clarity.

Every activity should be intentional—crafted to create moments of pride, trust, connection, and genuine engagement. To achieve this, an in-depth understanding of both the organizational and workforce context is essential. This ensures that every step and piece of information supports each phase of the onboarding journey with purpose and precision.

At Globeyond, we specialize in designing onboarding programs that are relevant, empowering, and deeply meaningful, tailored to each organization's goals, culture, and growth stage, and building capable, confident teams that are ready to contribute and thrive from day one.

Get in touch today for a complimentary assessment, and let's create a remarkable onboarding experience tailored to your organization's unique needs—one that inspires excellence, belonging, and long-term success.