

Onboarding Process Template



PRIOR TO START	FIRST DAY	FIRST WEEK	FIRST MONTH
<ul style="list-style-type: none"> ○ Call to confirm start date and time ○ Discuss relocation ○ Discuss dress code ○ Provide link to company / department onboarding webpage ○ Build welcome packet ○ Confirm receipt of all recruitment paperwork and background-check completion ○ Confirm offer Letter receipt / acceptance ○ Prepare work station / area ○ Order passkey and ID ○ Order email and phone setup ○ Order any hardware, software, peripherals, etc. ○ Enroll new hire in HR briefing, orientation, etc. ○ Schedule any pertinent training sessions 	<ul style="list-style-type: none"> ○ Welcome upon arrival and guide to workstation ○ Deliver and review welcome packet ○ Discuss break / meal policies ○ Introduce designated coworker resource ○ Confirm receipt and functionality of paskeys ○ Connect with HR to complete any further paperwork ○ Review portal ○ Sign offer Letter ○ Review software, hardware, technology, printers, etc. ○ Confirm email and phone setup ○ Review technology acceptable use policies ○ Assist with online directory setup ○ Make further introductions ○ Conduct or schedule tours 	<ul style="list-style-type: none"> ○ Ask how first week went ○ Assist with questions ○ Review training schedule ○ Review technology functionality ○ Discuss company culture and work style ○ Discuss current projects and cyclical processes ○ Review company mission statement, vision, and policies 	<div data-bbox="1522 362 1999 841" style="background-color: #e0e0e0; padding: 5px;"> <ul style="list-style-type: none"> ○ Assess need for weekly or bi-weekly meetings ○ Answer any questions ○ Set short and long-term goals ○ Answer any questions </div> <div data-bbox="1522 841 1999 963" style="background-color: #800000; color: white; text-align: center; padding: 5px;">FIRST THREE MONTHS</div> <div data-bbox="1522 963 1999 1484" style="background-color: #ffe0e0; padding: 5px;"> <ul style="list-style-type: none"> ○ Performance review ○ Review short and long-term goals ○ Answer any questions </div>