***Onboarding preparation checklist***

### **Communication**



Reach out to the employee ahead of time with a welcoming message.

Prepare documents for the new employee, such as benefits information, an organizational chart, annual reports, strategic plans, and a contact list.

Ensure that your employee handbook is up-to-date and that the new employee reviews and signs off on it in a timely fashion.

Share the onboarding schedule with the new employee, including what will happen on the first day, week, and month.

Schedule one-on-one meetings with the employee’s direct supervisor to discuss the projects assigned and review documentation.

Create a structured calendar ahead of time, and schedule regular check-ins and touchpoints so the new employee knows what to expect when they start.

### **Technology and resources**

Arrange for and equip a workspace with the necessary furniture, equipment, and supplies, and ensure that all equipment is clean and working.

Set up an email address, phone extension and/or cell phone, prepare business cards (if needed), and arrange an office access card/fob.



Ship equipment to remote workers before their start date.

Ensure IT is available to help new hires on their first day.

### **People and team**

Advise staff of the new employee’s name, position, and start date.



Send out a notice to board members (and potentially stakeholders and partners) V

Add the employee to organizational lists, including telephone, email, and website directories.

Contact the new employee to confirm details about their first day, including their start time, office location, and the name and contact information of their manager.



Set up the onboarding team. Confirm who will be doing what in the onboarding process.

Organize a lunch or after hours get together with the team to get to know everyone in a more casual setting.



Ask teammates to schedule a meet-and-greet with new hires.

Select an onboarding buddy to share advice with new hires and help them navigate the organization.