



Onboarding Checklist for HR



Intro


Welcoming a new hire isn't just about their first day, it's an entire journey. It starts before stepping into the office for the first time and continues until full integration into the workplace.

These first moments are incredibly important! A study revealed that 44% of employees regretted accepting their job offer within their first week of employment. These high rates of disappointment typically only give companies **44 days to persuade new hires to stay**, which isn't a long time!

Luckily, a good first impression can increase these odds. A **well-structured preboarding and onboarding** is the key to setting new hires up for success, boosting engagement, and reducing turnover. However, many HR professionals and managers struggle to keep up with what feels like countless onboarding tasks...

Onboarding is more than just ticking boxes, but this checklist makes it easier for everyone involved. And while it's directed at HR, it's useful for anyone—after all, onboarding is a team effort involving managers, buddies, IT, and others. By organising tasks and timelines, the checklist helps you streamline the process and takes the stress out of onboarding!

Happy onboarding,
Appical



Preboarding

Prepare new hires for their official first day! Make sure you are both ready with these first steps:

- ☐ Collect & share documents that need a signature
- ☐ Assign a mentor or buddy to the new hire
- ☐ Create a [30-60-90 day plan](#) to identify personal & professional goals for the new hire
- ☐ Arrange necessary devices (laptop, mobile phone etc.)
- ☐ Prepare workspace & tech set-ups (logins, software access, email, etc.)
- ☐ Send a warm welcome message
- ☐ Prepare a [welcome kit](#) with goodies
- ☐ Introduce the team to the new hire via mail, onboarding app or video
- ☐ Share practical info about the first day
- ☐ Inform your team about the start of a new colleague and clarify their role
- ☐ Invite the new hire to a team activity, such as lunch or drinks
- ☐ Share info about the company, including its culture, mission, vision, and history

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The big moment is finally here! To avoid feelings of overwhelm, we've organized the onboarding tasks into manageable and clear milestones for you. This includes the first day, week, month, and final steps.

The First Day

A new hire will probably feel nervous about their first day at a new job. Make them feel as welcomed as possible with an (ideally) on-site first day:

- ☐ Welcome the new hire into the office with a coffee or tea and ask how they are feeling
- ☐ Give them their welcome kit with fun & useful goodies
- ☐ Introduce the new hire to their assigned mentor or buddy
- ☐ Give an office tour around their new workplace, showing all building facilities
- ☐ Introduce the rest of the team & their roles
- ☐ Share company resources (handbooks, policies, etc.)
- ☐ Provide the devices, logins, & tools the new hire needs (assist if necessary)
- ☐ Send a company-wide message to celebrate their first day and welcome them into the company
- ☐ Communicate company goals & projects your team is working on with the new hire
- ☐ Invite the new hire to eat lunch together with colleagues
- ☐ Check in with the new hire to learn how their first day went

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The First Week

Now that the new hire has been welcomed to the workplace, begin familiarising them within the company itself. Slowly ease them into their new role with the following steps:

- ☐ Make sure job roles & responsibilities are clear
- ☐ Ensure all necessary paperwork & administrative tasks are completed & filed
- ☐ Review the new hire's 30-60-90 day plan together and add personal goals if needed
- ☐ Encourage the new hire to schedule 'coffee dates' to build relationships with colleagues
- ☐ Ensure all tech & software is working
- ☐ Give a simple/achievable first task & offer support
- ☐ Offer workshops or 1-on-1 sessions with colleagues to grow role-specific skills
- ☐ Provide training opportunities for the tools & software needed (e.g. CRM, CMS, etc.)
- ☐ Invite the new hire to team meetings to bring them up to speed with others' work
- ☐ Schedule a 1-on-1 to check-in
- ☐ Ask for feedback on the onboarding process (up to this point)

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The First Month

At this point, your new hire is beginning to understand their new role, team, and company. Continue setting them up for success by building their confidence and encouraging engagement:

- ☐ Schedule weekly 1-on-1's to check-in
- ☐ Give regular performance feedback
- ☐ Assign regular/long-term tasks & projects
- ☐ Organise team events to socialise with other departments
- ☐ Discuss long-term goals & expectations (following the 30-60-90 day plan)
- ☐ Address any challenges or questions the new hire may have
- ☐ Deliver comprehensive training tailored to the new hire's role
- ☐ Offer info on where to find ongoing support & resources
- ☐ Arrange meetings with important contacts within the organisation
- ☐ Gather the new hire's feedback on their onboarding process so far

Onboarding

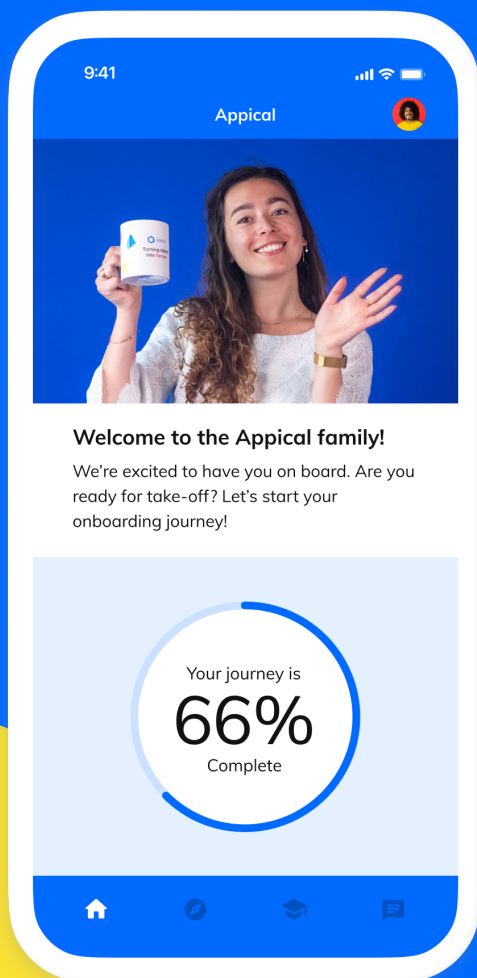
The Final Steps

Congratulate the new hire for completing their first month! Now that they're familiar with the company and their role, it's time to encourage some independence. Here are some tips to check off in the later stages of onboarding:

- ☐ Review the new hire's 30-60-90 day plan to assess progress and/or necessary adjustments
- ☐ Ensure the new hire feels integrated within the company culture
- ☐ Address any concerns the new hire may have
- ☐ Conduct a 6-month performance review
- ☐ Work together to outline long-term career paths & growth opportunities within the company
- ☐ Provide advanced workshops or trainings to develop skills in other areas of expertise
- ☐ Introduce them to more contacts within the organization to build professional relationships
- ☐ Encourage cross-department collaboration
- ☐ Conduct a 1-year performance review
- ☐ Collect constructive feedback about the new hire's entire onboarding process, identifying areas for improvement
- ☐ Inquire how the new hire feels about their work-life balance
- ☐ Celebrate the new hire's 1-year anniversary 🎉



Use Appical to help you structure the onboarding process



- Unlock information step by step
- Create engaging & personalized content
- Maintain and update your content in one place
- Easily keep track of your new hire's progress and task completion
- Checklist and reminder functionalities
- Integrate with other HR systems

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