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TOP 5 EMPLOYEE ONBOARDING TEMPLATES

So you've finalized your exciting new hire. You've been through the rough and rigorous hiring process and experienced some ups and downs. But now everything is finally falling into place.

But wait, the hiring process doesn't stop here. There's a connecting road ahead to onboard this new employee.

As HR leaders, you will be fully aware of how properly onboarding a new employee is key to making sure that they start off on the right foot, and to ensuring their continued success.

But first things first, what exactly is onboarding?

The definition of onboarding is "the process of incorporating a new employee into a company and familiarizing them with the company culture and policies, so they can become an effective and contributing member of the team."

It sounds pretty simple, right? But you might be surprised to learn that Gallup found that only 12 percent of employees strongly agree that their organization does a great job when it comes to onboarding new employees.

This can be considered a huge waste of a vital part of your employees' journeys. It is a missed opportunity for your workers to form a strong understanding of the culture and ethos of your organization and to get off to the strongest start possible.

Organizations need to put a great deal of thought into how to best onboard new employees. But with so much to consider, it can be easy for things to be forgotten or important points to be overlooked.

That's where we come in.

We have created five free employee onboarding checklist templates for various roles; these can be either used directly, or adapted and used as a jumping-off point for your own onboarding checklists.

The checklists we've created are for the following roles:

1. Developer
2. Sales team member
3. Marketing team member
4. Manager-level team member
5. Executive-level team member

But before we jump into the templates, here are a few things that you should consider...

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Timing is key

Some organizations will consider onboarding to be a task that only takes a week or less to complete. But the experts recommend that onboarding should last for at least 90 days, or even up to a year.

With this in mind, we have split each template up into four sections:

- Before start date
- First day
- First month
- First 90 days

This gives you the ability to ensure that the most important points of your new recruits' journeys are considered and accounted for—and that your onboarding process doesn't come to a close before your employees are fully trained and properly settled in.

The world of remote working

The modern workplace can have a number of employees who work remotely or in a hybrid environment. With this in mind, these checklists have been designed to be flexible, agile, and adaptable.

So while some of these points are only relevant to in-house workers, the rest can easily be adapted to include remote workers. For example, one-on-one meetings or introductions can be held via online video-conferencing, or employee training sessions (live on zoom or pre-recorded) can be done virtually. Perhaps the manager can take a tour of the office with the laptop while the candidate is on zoom to get a personal virtual tour.

It's also important that you treat your remote workers with the same level of detail and care as you do for your employees who work from your office. For example, you wouldn't leave a new employee sitting in the waiting room with just a note that says: "Welcome." Just like you wouldn't show them to an empty desk with no computer or tools.

So make sure that you properly greet your new remote employee via a video call, or at the very least with a strong onboarding email (for which we have the perfect onboarding email template). And make sure that any tools they need to properly do their job have arrived at wherever they are working from with plenty of time to spare.

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It's not all about the paperwork

Paperwork is important. There's no denying that.

You need to ensure that all the t's have been crossed and the i's have been dotted—
but onboarding is about far more than just signing some documents.

Proper onboarding involves immersing your new recruit into the culture of your organization
and making sure that they fit in and feel comfortable. It's about making sure that they
know exactly what is expected of them, and how they can reach their potential within your
organization.

So by all means, place an emphasis on making sure that the legal bits are in order—but don't
make it a central theme.

Our top five free employee onboarding checklists

1. Developer onboarding checklist template

This new employee onboarding template has been designed specifically for new developer hires. It goes through the basic steps of onboarding a new recruit into the developer position and gives an outline for you to adapt as you see fit, and pass forward to managers if needed.

CHECKLIST	DUE DATE	STATUS	MANAGER SIGN-OFF	NOTES
Before start date				
Complete employee profile with personal details				
Send documents for signature				
Set up IT materials (computer, network, software, access, permissions)				
Prepare welcome message to start onboarding				
Assign mentor/buddy				
Introduce developer to the company and vision				
Prepare company introduction email/message				
Send employee handbook, values, policies				
Add to payroll				
Set up role-specific training				
Start pre-boarding (company reading materials, org-chart, schedule 1:1 meetings)				

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First day				
Introductory tour (virtual, in-person)				
Deliver company swag (or place on desk)				
Send welcome email with links to start onboarding				
Meet the team				
Finalize documentation and paperwork				
Send company introduction email				
Schedule lunch with manager/buddy				

First month				
Review documentation for completion				
Transfer day-to-day activities				
Complete company training modules (health & safety, time & attendance, policies, etc.)				
Introduce learning & development systems				
Join company events (happy hours, town halls, lunches)				
Meet key people in the company (IT, department heads, management team)				
Set short term projects to be completed				
Schedule first 30-day review meeting with manager/HR				
Follow up on onboarding tasks and completion				
Schedule 1:1 meetings with managers and team				

1. Developer onboarding checklist template

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First 90 days				
Assign first projects				
Schedule advanced training modules				
Set long term goals				
Schedule six-month, nine-month, and one-year review meetings				
Complete onboarding tasks				
Send onboarding survey for feedback				

1. Developer onboarding checklist template

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2. Sales team member onboarding checklist template

The sales department is a busy and bustling place to be. This means that it can sometimes be overwhelming for new hires and things can be left by the wayside in an attempt to get them up and running straight away.

This template has been designed to make sure that each box is checked off for new sales team members. With a focus on targets and sales goals, you can be sure that your new recruit will start off on the right foot.

CHECKLIST	DUE DATE	STATUS	MANAGER SIGN-OFF	NOTES
Before start date				
Complete employee profile with personal information				
Send documentation and contracts for signatures				
Set up IT materials (computer, network, software, access, permissions)				
Send company handbook, values, and policies				
Prepare welcome message to start onboarding				
Add to payroll				
Introduce sales manager to team/managers/key players				
Set up role-specific training				
Start pre-boarding with org-chart, company info, intro slide-deck, offices, pictures, etc.				

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First day				
Introductory tour (virtual, in-person)				
Deliver company swag (or place on desk)				
Meet the sales team				
Log in to sales tools (CRM, lead tool, RFP creator, outreach, demos, scheduling, etc.)				
Reveiw sales goals and targets				
Start onboarding module for sales managers				
Send company introduction email/ message				
Schedule lunch with manager/C-level				

First month				
Complete documentation and contracts				
Start onboarding for sales managers				
Join company events (happy hours, town halls, lunches)				
Meet key people in the company (IT, department heads, management team)				
Shadow an experienced member of the sales team				
Map customers (relationship history, territory, lead stage)				
Begin independent product demo and testing				
Schedule 30-day reveiw meeting with manager				
Review sales goals and update targets				

2. Sales team member onboarding checklist template

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First 90 days				
Set quarterly sales goals and targets				
Finish onboarding tasks				
Meet legal team and overview of business terms				
Set up advanced skills training (negotiation, product, competition, etc.)				
Create territorial sales plan				
Discuss and plan opportunities to grow territory/customer base				
Start prospect outreach				
Schedule six-month, nine-month, and one-year progress meetings				

2. Sales team member onboarding checklist template

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3. Marketing team member onboarding checklist template

Marketing is a key aspect of any business. Any new employee will have to hit the ground running in a fast-paced environment. There are many ins and outs of an organization's marketing team, so a thorough onboarding process is vital.

CHECKLIST	DUE DATE	STATUS	MANAGER SIGN-OFF	NOTES
Before start date				
Complete employee details and create employee profile				
Send paperwork and documents for signature				
Request IT materials (computer, network, software, access, permissions)				
Prepare welcome message to start onboarding				
Assign mentor/buddy				
Prepare company introduction email/message				
Add to payroll				
Set up role-specific training				
Start pre-boarding (company reading materials, org-chart, schedule 1:1 meetings)				

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First day				
Introductory tour (virtual, in-person)				
Deliver company swag (or place on desk)				
Send welcome email with links to start onboarding				
Meet the marketing team (roles and responsibilities)				
Finalize documentation and legal papers				
Send company introduction email				
Log in to all marketing tech tools (CRM, content tools, email, advertising, lead gen, pipeline, media monitoring, etc.)				
Schedule lunch with manager/buddy				

First day

3. Marketing team member onboarding checklist template

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First month				
Meet marketing stakeholders				
Complete company training (health & safety, time & attendance, policies)				
Review vendor list				
Deep dive on existing campaigns that already exist				
Join company events (happy hours, town halls, lunches)				
Meet key people in the company (IT, department heads, management team)				
Define short term actions that can drive business growth				
Assign first tasks/project				
Research on competition and what they are doing in the market				
Schedule first 30-day review meeting with manager/HR				
Follow up on onboarding tasks and completion				
Schedule 1:1 meetings with managers and team				

3. Marketing team member onboarding checklist template

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First 90 days				
Assign first projects/tasks				
Schedule advanced training modules				
Set quarterly/yearly goals				
Schedule six-month, nine-month, and one-year review meetings				
Test, integrate marketing tools				
Complete onboarding tasks				
Create broader marketing plan (role-specific) for business growth				
Send onboarding survey for feedback				

3. Marketing team member onboarding checklist template

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4. Manager-level team member onboarding checklist template

Starting a new job at a managerial level is complicated. There are a lot of things to consider and it's important to hit the ground running. But while there are a lot of big things that need to be done, it's just as important to make sure the smaller ones are checked off too.

This template was designed to cover everything from the micro to the macro. It includes meetings with both the staff that will be working under the manager and the staff above them so that everyone can properly integrate and lines of communication can open up.

CHECKLIST	DUE DATE	STATUS	MANAGER SIGN-OFF	NOTES
Before start date				
Complete employee details and create employee profile				
Send paperwork and documents for signature				
Request IT materials (computer, network, software, access, permissions)				
Prepare welcome message to start onboarding				
Prepare company introduction email/message				
Add to payroll				
Set up role-specific training				
Start pre-boarding (company policies, values, handbook, org-chart, schedule 1:1 meetings)				
Introduction to company leadership				
Brief from HR on each team member				

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First day				
Introductory tour (virtual, in-person)				
Deliver company swag (or place on desk)				
Send welcome email with links to start onboarding				
Meet the direct team (roles and responsibilities)				
Finalize documentation and legal papers				
Send company introduction email				
Log in to all tech tools (role-specific)				
Schedule lunch with team				
Review challenges and objectives				
Walk-through of company policies (remote work, security, internal mobility, HR policies, rewards, recognition)				

4. Manager-level team member onboarding checklist template

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First month				
Define short term actions that can drive business growth				
Complete company training (health & safety, time & attendance, policies)				
Review goals and targets for department				
Set goals for first 90 days with milestones				
Review budgets and timelines				
Join management training modules (conflict management, DEI&B, motivation, etc.)				
Join company events (happy hours, town halls, lunches)				
Meet key people in the company (IT, department heads, management team)				
Review and align goals and targets of team members				
Schedule first 30-day review meeting with manager/HR				
Follow up on onboarding tasks and completion				
Schedule 1:1 meetings with team members				
Schedule regular/recurring team meetings and updates				

4. Manager-level team member onboarding checklist template

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First 90 days				
Create operational plan				
Set quarterly/yearly goals of department and team				
Continue training modules for managers (leadership, crisis, team management, communications, etc.)				
Set quarterly/yearly goals				
Schedule six-month, nine-month, and one-year review meetings				
Complete onboarding tasks				
Create business plan (role-specific) to meet goals				
Send onboarding survey for feedback				
Create 1:1 meetings with all team members				
Align tasks and goals with company and team members				

4. Manager-level team member onboarding checklist template

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5. Executive-level team member onboarding checklist template

Executive onboarding can be a very complex process. There is a higher degree of financial risk if an executive-level team member isn't trained properly, so this onboarding process has to be done correctly and to the best of your ability.

This employee onboarding template is perhaps the most open to modification, as the executive structure at each company can vary to some extent. We've added key elements such as forming an executive development plan as well as setting up introductory meetings with stakeholders and other key points of contact.

CHECKLIST	DUE DATE	STATUS	MANAGER SIGN-OFF	NOTES
Before start date				
Complete profile and fill in personal details				
Send paperwork and documents for signature				
Request IT materials (computer, network, software, access, permissions)				
Prepare welcome message to start onboarding				
Prepare company introduction email/message				
Add to payroll				
Start pre-boarding (company policies, values, handbook, org-chart, schedule 1:1 meetings)				
Schedule meetings with executive team members				
Introduction to shareholders				
Assign executive mentor				

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First day				
Introductory tour (virtual, in-person)				
Deliver swag (or place on desk)				
Send welcome email with links to start onboarding				
Finalize documentation and legal papers				
Send introduction email to company				
Set up resources to do the job (SaaS, training, home office, network, logins,)				
Schedule lunch with C-level				
List of important dates/ upcoming events				
List of vendors used in the company				
List of project due dates				
List of known accomplishments in the industry				
IT training				
Review company goals and vision				

5. Executive-level team member onboarding checklist template

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First month				
Learn internal processes				
Be versed in the company culture				
Prepare PR or public/social announcement				
Review financial data				
Share organizational policies, team evaluations, group structures, business strategies				
Introductory meetings with other teams and offices				
Build relationships with teams and coworkers (seminars, strategic discussions, candid conversations, etc.)				
Technology setup, coaching, support				
Join company events (happy hours, town halls, lunches)				
Finalize performance objectives and identify early wins				
Report on findings and and create a development plan				
Fianlize action plan to discuss with senior leaders				
Schedule first 30-day review meeting with manager/HR				

5. Executive-level team member onboarding checklist template

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First 90 days				
In depth industry training				
Complete onboarding tasks				
Strengthen alliance with key stakeholders				
Continue to develop effective communication processes with peers, managers, and other stakeholders				
Define critical success objectives				
Identify opportunities and action plan				
Build operational plan				
Define strategic priotiries and status				
Understand products and services				
Review budgets and changes				
Create reporting structure				
Develop unique voice and vision				
Schedule six-month, nine-month, and one-year review meetings				

5. Executive-level team member onboarding checklist template

The bottom line

From the top of the company structure all the way to the bottom, every employee deserves a thorough and well-thought-out onboarding process.

With the help of an onboarding plan template, you will have access to a strong set of onboarding tools to guide your new recruits through the first three months of their new jobs.

But wait, the employee experience doesn't stop there.

All of these templates include six-month, nine-month, and one-year progress meetings—but you and their managers should regularly check in with employees to make sure that they are happy in their roles, and have a full understanding of what is expected of them.

Meet Bob

At HiBob, we've built a modern HR platform designed for modern business needs—today and beyond.

In today's rapidly changing employment landscape, HR leaders need to build a company culture that engages and retains both in-house and remote employees—both during the onboarding period and for the entire duration of their time at the firm—fostering comradery and commitment.

That's why we built Bob, an modern HR platform that was designed to put people first. With Bob's onboarding feature, you can make the best first impression with a positive and streamlined experience.

Onboarding

Provide a positive and streamlined experience for your new hires that sets the stage for employee engagement, better employee retention, and increased productivity.

- Automate onboarding workflows ensure every task and touchpoint is covered
- Preboard new hires to start their journey before day one
- Showcase the people and company culture for a great headstart
- Make it official with company-wide announcements
- Personalize the onboarding to meet the needs of the role, team, and country

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