**[A blue and white sign

AI-generated content may be incorrect.](https://www.smartsheet.com/try-it?trp=8779&utm_source=template-word&utm_medium=content&utm_campaign=Onboarding+Checklist+for+Managers-word-8779&lpa=Onboarding+Checklist+for+Managers+word+8779)Onboarding Checklist for Managers Template**

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| --- | --- | --- | --- | --- | --- | --- |
| **Checklist Categories** | **Need?** | **Status** | | **Process Monitor / Mentor  (If Applicable)** | **Notes** | |
| Before Start | | | | | | |
| Confirm the start date, work location (remote/hybrid/in-office), and contact person. |  | Complete | |  |  | |
| Send a welcome email and introduction to the team. |  | In Progress | |  |  | |
| Assign an onboarding buddy or mentor. |  | Hold | |  |  | |
| Schedule first-week meetings and training sessions. |  | Alert | |  |  | |
| Provide access to key software, platforms, and tools. |  | Not Applicable | |  |  | |
| Confirm workspace setup (office desk or remote equipment delivery). |  | In Progress | |  |  | |
| Discuss relocation support (if applicable). |  | In Progress | |  |  | |
| First Day | | | | | | |
| Personally welcome new hire (in-person or virtual) |  | Complete |  | | |  |
| Share the company's mission, values, and culture |  | Complete |  | | |  |
| Introduce team members and key stakeholders |  | Complete |  | | |  |
| Review job role, expectations, and success metrics |  | Hold |  | | |  |
| Ensure completion of HR and IT setup |  | Not Applicable |  | | |  |
| Discuss company policies and employee resources |  | Not Applicable |  | | |  |
| Schedule the first one-on-one meeting |  | Not Applicable |  | | |  |
| First Week | | | | | | | |
| Check progress and address any questions | |  | In Progress |  | | |  |
| Review training schedule and learning resources | |  | In Progress |  | | |  |
| Discuss team workflows, communication norms, and collaboration tools | |  | In Progress |  | | |  |
| Assign first tasks or small projects | |  | In Progress |  | | |  |
| Encourage participation in team meetings | |  | In Progress |  | | |  |
| Introduce employees to cross-functional partners | |  | In Progress |  | | |  |
| Ensure new hire completes all required compliance training | |  | In Progress |  | | |  |
| First 30 Days | | | | | | | |
| Conduct initial performance check-in. | |  | Complete |  | | |  |
| Gather feedback from the employees on the onboarding experience. | |  | Complete |  | | |  |
| Encourage deeper team engagement and relationship-building. | |  | Complete |  | | |  |
| Assign additional projects aligned with role responsibilities. | |  | Complete |  | | |  |
| Reinforce company culture and leadership expectations. | |  | Complete |  | | |  |
| Provide input on early performance and development areas. | |  | Complete |  | | |  |
| Conduct initial performance check-in. | |  | Complete |  | | |  |

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| First 60 Days | | | | |
| Assess how well the employee is integrating into the team. |  | Complete |  |  |
| Increase responsibility and encourage independent decision-making. |  | Complete |  |  |
| Discuss career development and learning opportunities. |  | Complete |  |  |
| Evaluate employee's comfort with role expectations. |  | Complete |  |  |
| Identify skill gaps and recommend training programs. |  | Complete |  |  |
| Assess how well the employee is integrating into the team. |  | Complete |  |  |
| Increase responsibility and encourage independent decision-making. |  | Complete |  |  |
| First 90 Days | | | | |
| Conduct a formal 90-day performance review. |  | Complete |  |  |
| Finalize long-term goals and career development plan. |  | Complete |  |  |
| Encourage the employee to provide onboarding feedback to HR. |  | Complete |  |  |
| Discuss leadership opportunities or cross-functional collaboration. |  | Complete |  |  |
| Fully transition employee to standard performance cycles. |  | Complete |  |  |
| Conduct a formal 90-day performance review. |  | Complete |  |  |
| Finalize long-term goals and career development plan. |  | Complete |  |  |

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