**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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