TOP 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. 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 person. As HR leaders, you're fully aware of how properly **onboarding** a new joiner is key to making sure that they start off on the right foot. According to **Gallup analytics**, people who have excellent onboarding experiences are 2.6 times more likely to be satisfied at work and stay with the company.

To help guarantee an effective onboarding experience, use employee onboarding templates to guide the process and create a meaningful start for your new colleague.

What are employee onboarding templates?

Organizations need to put a great deal of thought into how to best onboard new people. With so much to consider, it's easy to miss details or overlook critical steps. And as **Payapps** discovered, manual onboarding processes sacrifice efficiency and team member experience.

That's where employee onboarding templates are a game-changer—the pre-made documents and checklists lower the odds of important onboarding processes slipping through the cracks.

Here you'll find seven free employee onboarding checklist templates for various roles. They can be used directly or adapted and used as a jumping-off point for your own onboarding checklists.

These employee onboarding templates cover the following roles:

1. General onboarding

2. Remote onboarding

3. Developer

4. Sales team member

5. Marketing team member

6. Manager-level team

7. Executive-level team

HiBob

Important employee onboarding templates

Help new team members make a smooth transition into their roles by using the free employee onboarding templates below.

1. General onboarding checklist

This general onboarding checklist serves as an overall roadmap of what to cover with your new team member before their start date, on their first day, during their first week, and over their first three months. It's not specific to any one role, making it easy for you to modify based on the positions you're currently looking to fill.

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)				
Send company introduction email/message				
Send company handbook, values, and policies				
Add to payroll				
Assign mentor/buddy				
Set up role-specific training				
Prepare welcome message to start onboarding				
Start pre-boarding (company reading materials, org-chart, schedule 1:1 meetings)				

HiBob

Checklist	Due date	Status	Manager sign-off	Notes
First day				
Introductory tour (virtual, in-person)				
Deliver company swag (or place on desk)				
Send welcome email with links to start onboarding				
Introduce new colleague to the team				
Finalize documentation and paperwork				
Schedule lunch with manager/buddy				
First month				
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				

HiBob

Checklist	Due date	Status	Manager sign-off	Notes
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				

2. Remote onboarding checklist

Remote onboarding involves unique challenges and stages, starting even before day one. A structured plan keeps things organized and sets your new team members up for professional success.

This remote onboarding checklist structures the first 90 days into 30-day increments, with each increment focusing on a specific set of remote unique needs and how to master them.

Day	Responsibility	Action
		Day 1-30
1	**Manager**	• Welcome new hire with 1:1 video conference • Agree on mechanisms for bridging distance or time zones (such as check-in message or mid-morning coffee chat) • Discuss desired frequency of communication and management style • Hold team welcome call using video conferencing software • Assign a "work buddy" to new hire
1	**HR**	• Hand over tax forms, health declarations, and insurance paperwork
1	**IT**	• Hold conference call with new hire to set up and introduce company IT systems • Send additional usage instructions as needed
2-7	**HR**	• Send any additional legal forms, NDAs etc. that haven't been signed yet • Introduce new hire to learning processes, systems, and personal development policies • Have employee confirm bank details in employee record
2-7	**Hiring manager or manager**	• Introduction to company market and solutions • Explain company culture and values to the new hire • Set up meetings with key people (department heads, members of the management team)
4	**HR or Hiring manager**	• Set up mentoring program for new employee
5	**Direct manager**	• Connect the new employee to other employees who share common interests on corporate social networks • Introduce new hire to Slack groups and Asana
5	**HR**	• Enroll employee in pension, insurance, and benefits plans • Arrange CEO conference call with all new hires during last 30-day period
7-30	**Employee**	• Meet additional coworkers as needed • Connect socially with other employees through Slack or other social mechanism • Work on meeting 30-day goals

Hi Bob

Day	Responsibility	Action
**Day 1-30**	
30	**Manager**	• Review 30-day progress • Discuss how to overcome challenges (if any) • Identify areas for improvement or training • Identify project for new hire to lead • Discuss goals for next 30 days
30	**HR**	• Make quick social call to new hire • Send 30-day new employee
30	**Employee**	• Complete 30-day new employee survey
**Day 31-60**	
60	**Manager**	• Review 60-day progress • Discuss how to overcome challenges (if any) • Identify areas for improvement or training • Identify project for new hire to lead • Discuss goals for next 30 days
60	**HR**	• Make quick social call to new hire • Send 60-day new employee survey
60	**Employee**	• Complete 60-day new employee survey
**Day 69-90**	
90	**Manager**	• Review 90-day progress • Discuss how to overcome challenges (if any) • Identify areas for improvement or training • Discuss goals for next 90 days or until company-wide review cycle
90	**HR**	• Make quick social call to new hire • Send 90-day new employee survey
90	**Employee**	• Complete 90-day new employee survey

3. Developer onboarding checklist template

This new joiner 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)				
Send company introduction email/message				
Send company handbook, values, and policies				
Add to payroll				
Assign mentor/buddy				
Set up role-specific training				
Prepare welcome message to start onboarding				
Start pre-boarding (company reading materials, org-chart, schedule 1:1 meetings)				

Hi Bob

Checklist	Due date	Status	Manager sign-off	Notes
First day				
Introductory tour (virtual, in-person)				
Deliver company swag (or place on desk)				
Send welcome email with links to start onboarding				
Introduce new developer to the team				
Finalize workstation setup				
Introduce new developer to the team				
Give an initial tour of tech stack, knowledge bases, and best practices				
Finalize documentation and paperwork				
Schedule lunch with manager/buddy				
First month				
Complete company training modules (health & safety, time & attendance policies, etc.)				
Introduce learning & development systems				
Guide through dev processes, workflows, codebase, and code style				
Assign short term tasks and projects for hands-on experience				
Conduct regular feedback loops				
Join company events (happy hours, town halls, lunches)				

Hi Bob

Checklist	Due date	Status	Manager sign-off	Notes
First month				
Meet key people in the company (IT, department heads, management team)				
Schedule first 30-day review meeting with manager/HR				
Follow up on onboarding tasks and completion				
Schedule 1:1 meetings with managers and team				
First 90 days				
Provide opportunities to shadow experienced team members to learn debugging and problem solving best practices				
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				

4. 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 details				
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.				

Hi Bob

Checklist	Due date	Status	Manager sign-off	Notes
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				

Checklist	Due date	Status	Manager sign-off	Notes
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				

HiBob

5. Marketing team member onboarding checklist template

Marketing is a key aspect of any business. Any new person 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)				

Hi Bob

Checklist	Due date	Status	Manager sign-off	Notes
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 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				

HiBob

Checklist	Due date	Status	Manager sign-off	Notes
First month				
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				
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				

HiBob

6. 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 ramp up quickly. 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 reading materials, org-chart, schedule 1:1 meetings)				
Introduction to company leadership				
Brief from HR on each team member				

Hi Bob

Checklist	Due date	Status	Manager sign-off	Notes
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)				
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 milestonest				
Review budgets and timelines				

HiBob

Checklist	Due date	Status	Manager sign-off	Notes
First month				
Join management training modules (confilict 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				
SSchedule regular/recurring team meetings and updates				
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 goal				
Schedule six-month, nine-month, and one-year review meetings				
Complete onboarding tasks				

HiBob

Checklist	Due date	Status	Manager sign-off	Notes
First 90 days				
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				

HiBob

Hi Bob

7. 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. It includes 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 reading materials, org-chart, schedule 1:1 meetings)				
Schedule meetings with executive team member				
Introduction to shareholders				
Assign executive mentor				

Hi Bob

Checklist	Due date	Status	Manager sign-off	Notes
First day				
Introductory tour (virtual, in-person)				
Deliver company swag (or place on desk)				
Send welcome email with links to start onboarding				
Finalize documentation and legal papers				
Send company introduction email				
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				

Hi Bob

Checklist	Due date	Status	Manager sign-off	Notes
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				

HiBob

Checklist	Due date	Status	Manager sign-off	Notes
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				

Bonus: Employee onboarding documents checklist

With so many steps involved in the onboarding process, an employee onboarding documents checklist is a handy tool for maintaining consistency. Make sure the following documents are ready and accessible so new team members can feel prepared and confident from day one.

1. Hiring documents

Once you've decided to hire someone new, it's time to make it official—starting with the following hiring documents.

- **Job offer letter:** An official offer of employment
- **Employment contract:** A written agreement that details a new person's roles and responsibilities

Pro tip: Use automated workflows to get both you and new joiners the documentation you need, like **TourRadar**. When a prospective team member accepts an offer, their automated workflow sends an email to request all relevant documents.

2. Preboarding documents

An effective **preboarding** process makes onboarding more efficient and gives new people time to get acclimated to their upcoming role. Some important preboarding documents to send them include:

- **I-9 form:** An employment eligibility form to work in the US
- **W-4 form:** A tax document required in the US for all new hires
- **Local tax forms:** Tax forms required by the state a new person resides in
- **Direct deposit forms:** A form to collect preferred bank account details for processing payments
- **Employee information form:** A document to gather relevant personal data for your **company's records**
- **Preboarding questionnaire:** A survey to gather insights in order to continuously improve your company's **onboarding process**

Pro tip: Try **AlgoSec's approach** and build a personalized preboarding experience to improve team member experience and ensure all touchpoints are covered.

3. Onboarding documents

After preboarding is over, it's helpful to have your onboarding documents prepared for your new team member's first day. The sooner their paperwork is submitted, the faster they can settle in and get started. Here is important onboarding paperwork to have at the ready.

- **Employee handbook:** A manual to help new people get to know your company and what it stands for
- **Organizational chart or employee directory:** An overview of your company's internal structure, how departments are connected, and contact information for the entire team
- **Benefits enrollment:** A set of documents to sign up new people for the benefits offered by your company
- **Code of conduct:** A document that lays out acceptable and unacceptable behaviors on the job
- **30-60-90 onboarding plan:** A structured plan to track your new team member's progress over the first 30, 60, and 90 days
- **Attendance policy:** A document that outlines attendance-related expectations, policies, and procedures

Pro tip: Encourage team member engagement by making the onboarding process more engaging. Take **Novatti**, for example: Their lighthearted and fun onboarding workflows help new starters feel welcomed to the team.

4. Other onboarding documentss

Depending on your company and the specific role you're hiring for, these additional **onboarding documents** may be a necessary addition to your collection.

- **Anti-harassment policy:** A document aimed at preventing offensive behavior and treatment and describing specific protections available
- **IT policy:** A set of guidelines for using IT resources to ensure compliance with company standards
- **AI policy:** A set of rules for how AI is allowed—and prohibited—to be used on the job
- Non-disclosure agreements: An agreement that new people will keep specific company information confidential
- **Time-off and vacation request forms:** Forms to request specific types of **paid time off**, such as sick leave or vacations
- **Health declarations:** A document that highlights new people's health status to assess if they require accommodations
- **Work permits:** A legal document that grants a foreign person permission to work in the country

Pro tip: Use **HR software** to create automated workflows that save you time and stress. Thanks to **HR tech**, **Rebellion** now sets up entire onboarding processes for new joiners in just 15 minutes.

Considerations for the employee onboarding process

A thoughtful onboarding process creates an environment where new team members can thrive right away. Read on for important considerations to make as you level up how your company onboards new people.

Timing is key

Some organizations will consider onboarding to be a task that only takes a week or less to complete, but companies that spend a month or less on these programs are **9 percent less likely to keep first-year team members** at the organization. **But the experts** recommend that onboarding should last for at least 90 days, or even up to a year.

With this in mind, each of these employee onboarding templates are split into four sections:

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

This gives you the ability to ensure the most important points of your new recruits' journeys are considered and accounted for—and your onboarding process doesn't come to a close before your new team members 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, but onboarding processes haven't always kept up. In fact, **63 percent** of remote workers feel their onboarding training was inadequate. With this in mind, these employee onboarding templates 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 the perfect **onboarding email template** is available). 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.

It's not all about the paperwork

Paperwork is important. There's no denying that. You need to ensure 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.
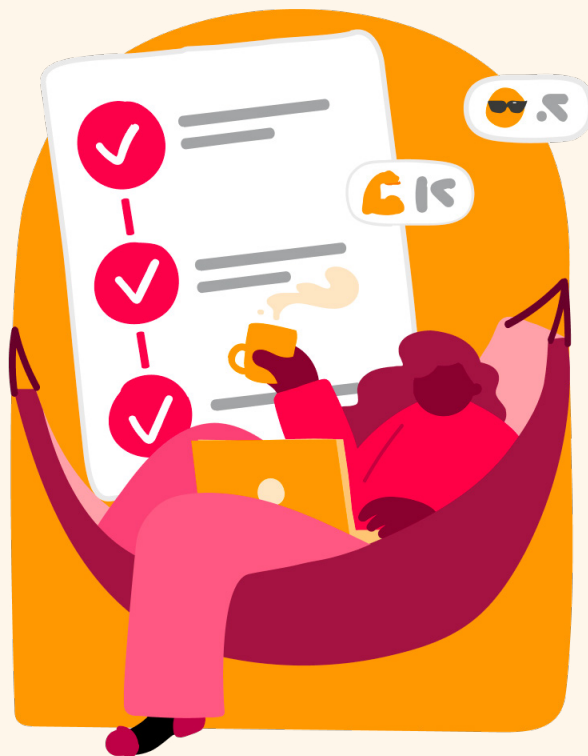
Use clear onboarding templates to create a culture of learning

From the top of the company structure all the way to the bottom, every person deserves a thorough and well-thought-out process. With the help of employee onboarding plan templates, you'll have access to a strong set of **onboarding tools** to guide your new recruits through the first three months of their new jobs.

But 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 to make sure each person is happy in their role and have a full understanding of what's expected.

Meet Bob

Today's **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—encouraging camaraderie and commitment.

That's why we built Bob, a 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 with Bob

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 to 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 head start

- Make it official with company-wide announcements

- Personalize the onboarding to meet the needs of the role, team, and country