



## Onboarding Process Step-by-step Checklist

### Step 1. Prepare

1. Design corporate onboarding plans (use [Smartsheet](#), [Clear Company](#), [StepShot Guides](#), or [SilkRoad](#)).
2. Create step-by-step guides or a knowledge base for fast and easy onboarding on company products, software tools, or routine procedures ([StepShot Guides](#), [eXo](#), [Google Drive](#)).
3. Prepare a new employee, provide them with the background materials described in the previous practices and your contacts, just in case.
4. Prepare a workstation for a newcomer, make sure it's clean and ready to use.

### Step 2. Orient

5. Design and execute formal orientation procedures (for planning, you can also use the aforementioned tools).
6. Set clear roles, responsibilities, and expectations to make a newcomer feel comfortable in the new position; be ready to discuss related employee's concerns.
7. Talk about how a usual workday goes in your company.

### **Step 3. Incorporate**

---

8. Welcome the newcomer on the first day.
9. Do an office tour for the new employee.
10. Introduce the new team member to other staff.
11. Provide access to necessary credentials, tools, keys, etc. to enable a new hire to use the required software and hardware.
12. Assign a mentor to assist the newcomer during the onboarding process.
13. Arrange a team lunch to communicate in a less formal atmosphere.
14. Provide appropriate and durable training at the office or onboarding online (take advantage of [Lessonly](#), [StepShot Guides](#), [Confluence](#)).

### **Step 4. Involve & Motivate**

---

15. Engage the new hire in teamwork.
16. Explain organizational strategy and the newcomer's role in its accomplishment.
17. Delineate bonuses and a reward system if applicable.
18. Celebrate the achievements of the newcomer - but not only with material incentives.

### **Step 5. Keep Track**

---

19. Track the onboarding process and direct its course if necessary ([BambooHR](#), [Lessonly](#), [Jira](#)).
20. Follow-up: ask, answer, assess, and provide feedback for employee performance.
21. Hold stakeholder check-in meetings to check on employee work.
22. Make sure that the newcomer is not overwhelmed with everything at once, keep the onboarding at a steady pace.

Try [StepShot Guides](#) for **FREE** to make onboarding process fast & easy