

Teammate Onboarding Checklist

Making people feel welcome as they join a new team is essential to their sense of belonging and success in your organization. A thoughtful onboarding process makes new folks feel like someone has taken the time and effort to make sure they're taken care of. Customize this checklist to make the onboarding process run as smoothly as possible. This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](#).

Pre-Onboarding Tasks

You don't need to wait till your new teammate's first day on the job to lay the groundwork for their inclusion in the team. Here are some things you could do well in advance before they walk through the door. Certain tasks are called out as responsibilities for the direct manager. That may or may not be you!

- Create teammate's organization email address
- Add teammate to any cloud-based shared drives
- Add teammate to any relevant email listservs, discussion groups, chat services
- Add teammate to any recurring team meetings
- Start the process for acquiring any necessary work equipment, including work from home necessities (laptop, laptop peripherals, privacy screen, headphones, etc)
- Prepare a list of key people that teammate should meet in the [first 4 weeks](#)
- Schedule a team lunch or other social event for the first week: Take a look at [Paradigm's](#) insights and suggestions for [planning inclusive events](#)
- Create teammate's [onboarding doc](#)
- Create a consolidated list of required reading, or essential resources to review, including information about Employee Assistance Programs or additional benefits provided to trust and safety team members
- Draft an email to be sent on Day 1 to the immediate team and other partner teams, welcoming your new teammate
- Schedule a Day 1 immediate team sync for 15 minutes to welcome your new teammate

For direct managers

- Schedule daily 1:1 30 minute check-ins at the end of each day of the first 2 weeks with an open-ended agenda so that you can cover anything from "what's the team strategy for X" to "how can I get access to this tool"
- Schedule weekly 1:1s
- Set the themes for [weeks 1-4](#)

Day 1

- Send out an email to the immediate team and other partner teams, welcoming your new teammate!
- Introduce your teammate to the immediate team at the pre-scheduled 15 minute team sync
- Share the [onboarding doc](#)
- Leave space for any other organization-led new hire onboarding program

For direct managers

- ❑ Dedicate your first 1:1 on Day 1 to going over the [onboarding doc](#)

Weeks 1-4

Here are suggested themes for weeks 1-4 that you can customize to be relevant to your needs. Themes orient your new teammate towards what they should be focused on, so they don't feel overwhelmed by all the information and expectations that they might feel worried about incorporating in these early days.

Week 1: Acclimation

Acclimation is all about easing into the new role, acknowledging that a transition into a new organization can feel like a shock to the system. This is likely to be one of those weeks where there is marginal utility in the teammate staying at work till late, so encourage them to wrap things up early if they'd like, and meter their cognitive overload. Goals this week should include:

- ❑ Ensuring that they're able to complete all the administrative tasks that come with being in a new role like getting their work laptop set up, figuring out internal systems necessary for logging hours or submitting requests for time off, enrolling in healthcare benefits, etc
- ❑ Ensuring that they have access to all the tools and resources they need to function in their role
- ❑ Meeting with their direct team (don't forget team lunch or some other social event!) and peers to get to know their work, and start thinking about how their work fits in with the broader team's
- ❑ Going through the required reading list

Week 2: Engagement

Engagement is all about starting to meet with essential stakeholders who are outside of the direct team. This week is likely to be heavy on 1:1 meetings, and some group meetings. There should be no expectation of active contribution to meetings or work this week, as the teammate is piecing together how they fit in the broader organization. Goals this week should include:

- ❑ Understanding who their main stakeholders are, and getting to know them
- ❑ Introducing themselves and flagging that they will be the appropriate point of contact for their particular area of work
- ❑ Understanding how their work fits with their main stakeholders' work

Week 3: Immersion

Immersion is all about starting to engage and participate in meetings, discussions, and other areas where the teammate's contributions begin to make an impact. At this stage, the teammate should be attending all necessary meetings, and beginning to build their credibility as the right point of contact for their scoped work. No quarterly or bi-annual goals should be set yet, as the teammate's participation is about feeling out team and stakeholder dynamics in action. Goals this week should include:

- ❑ Attending the meetings that are relevant to their scope of work
- ❑ Flagging areas where the director could be more actively helpful like removing certain blockers or dependencies

Additional goals this week for the direct manager:

- ❑ Ensuring that the teammate feels comfortable engaging and participating in meetings
- ❑ Identifying and removing any superficial blockers or dependencies that might inhibit the teammate from bringing their full value to the role

Week 4: Goal setting

Goal setting week is all about the teammate proposing and refining their goals for the next defined time period (could be quarter, 100 days, for the half of the year, etc). They should be working closely with their direct manager to define projects to work on. It's the role of the direct manager to ensure that the teammate can draw a direct line from their work to the organization's mission. Goals for this week are simple:

- Identify and define top projects to develop in the next defined time period

Additional goals this week for the direct manager:

- Collaborate with the teammate on making sure that their goals are aligned with the broader team's goals, and the organization's mission

Onboarding doc template

This is a document you can hand to your new teammate on their first day to help them track all the things that they may encounter, and expectations for onboarding for the next 4 weeks. If you've followed the checklist so far, filling this in can be done quickly!

[Write a brief welcome note here to express how excited you are for your new teammate coming onboard!]

We've put together a doc to help you navigate the first 4 weeks with the team, from essential meetings to required reading.

Day 1

- You should have access to the following email listservs, discussion groups, chat services, and shared drives. Still need access? Reach out to [Person, email address]:
 - Link 1: short description
 - Link 2: short description
 - Link 3: short description
- The following recurring meetings should be on your calendar. If not, reach out to [Person, email address]:
 - Team meeting 1: short description
 - Team meeting 2: short description
 - Team meeting 3: : short description
- For the next 2 weeks, you'll have daily check-ins with [direct manager]. The daily check-ins don't have a specific agenda, and are open-ended so you can cover anything from "what's the team strategy for X" to "how can I get access to this tool"

Your first month here has been divided into 4 themed weeks to help manage the flow of information that is coming your way!

Week 1: Acclimation

Acclimation is all about easing into the new role, acknowledging that a transition into a new organization can feel like a shock to the system. Meter your cognitive load, there's a lot to take in! Also, you're encouraged to wrap up early to give yourself some time and space to adjust to all the new things. Goals for this week include:

- Completing all the administrative tasks that come with being in a new role like getting your work laptop set up, figuring out internal systems necessary for logging hours or submitting requests for time off, enrolling in healthcare benefits, etc
- Ensuring that you have access to all the tools and resources you need to function in your role
- Meeting with the immediate team and peers to get to know their work, and start thinking about how your work fits in with the broader team's
- Going through the [required reading list](#)

People to meet and get to know this week (please schedule directly with them):

- Teammate 1 on immediate team: short description of their role
- Teammate 2 on immediate team: short description of their role
- Teammate 3 on immediate team: short description of their role

Other things happening this week:

- Team lunch/event: short description
 - Important info 1: short description
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Week 2: Engagement

Engagement is all about starting to meet with essential stakeholders who are outside of the direct team. This week is likely to be heavy on 1:1 meetings, and some group meetings, but there's no expectation of active engagement as you're still absorbing information. Goals this week include:

- Understanding who your main stakeholders are, and getting to know them
- Introducing yourself and flagging that you will be the appropriate point of contact for [area of work]
- Understanding how [area of work] fits with your main stakeholders' work

People to meet and get to know this week (please schedule directly with them):

- Stakeholder 1: short description of their role
- Stakeholder 2: short description of their role
- Stakeholder 3: short description of their role

Other things happening this week:

- Important info 1: short description
 - Important info 2: short description
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Week 3: Immersion

Immersion is all about starting to engage and participate in meetings, discussions, and other areas where your contributions begin to make an impact. Goals this week include:

- Attending the meetings that are relevant to [scope of work]
- Flagging areas where [direct manager] could be more actively helpful like removing certain blockers

Meetings to attend this week, and on a recurring basis:

- Meeting 1: short description
- Meeting 2: short description
- Meeting 3: short description

Other things happening this week:

- Important info 1: short description
 - Important info 2: short description
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Week 4: Goal setting

Now that you've spent some time getting adjusted to the team, we're ready to set up goals together. Goals for this week are simple:

- Identify and define top projects to develop in the next defined time period

Additional goals this week for the direct manager:

- Collaborate with the teammate on making sure that their goals are aligned with the broader team's goals, and the organization's mission
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Required reading

1. Document 1: short description
 2. Document 2: short description
 3. Document 3: short description
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Acknowledgements: This work would not be possible without the generous feedback of folks who have gone through onboarding with me. Thanks for paying it forward with your candor so that others can have better experiences!