New employee onboarding checklist

Use this checklist to prepare a useful first day and agree who will arrange each part of the welcome.

Your job is to help the new starter succeed in their role.

Colleague _____ Role _____

Manager _____ Start date _____

Before the first day

What to arrange	Owner	Ready by
Confirm where to arrive, the start time, who will meet them and how to contact that person.		
Prepare the equipment, approved access and work information needed for their first tasks.		
Choose a colleague who can demonstrate the work and answer everyday questions.		
Explain the first week's priorities and arrange the required role-specific instruction and supervision.		
Check the current versions of shared guides. Make the important information easy to find.		
Book the four-, eight- and twelve-week reviews. Leave time for earlier conversations when needed.		

On the first day

Welcome them personally. Introduce the people they will work with, show them where to find help and explain the plan for the day. Check that equipment and access actually work. Make time to demonstrate the first task and hear their questions.

What still needs arranging

Give each outstanding item an owner and a date. Carry it into the first-week plan.

Week 4 review _____ Week 8 review _____ Week 12 review _____

Adapt this practical manager checklist to the role. Follow your organization's separate employment, safety and training requirements.

First week support plan

Agree a manageable starting point. Show the work, make time to practice and check what support is still needed.

Colleague _____ Role _____

Manager _____ Meeting date _____

The first week essentials

Check together	Owner	By when
The colleague can explain their first priorities and knows what good work looks like.		
They can find the current instructions and know who to contact when something is unclear.		
Someone has demonstrated the first tasks, with time for guided practice and feedback.		
The manager has asked what is difficult and followed up on missing equipment, access or guidance.		

Make the support specific

Task or priority	Help I will arrange	By when

The colleague's view

What feels clear? What has been harder than expected? What would help?

Progress worth recognizing

Name something they did well and explain why it mattered. Ask how they prefer to be thanked.

Next check-in _____ Manager commitment checked on _____

Continue with the matching review and action sheets on pages 3–8. Share completed notes with the colleague and keep them in the appropriate private record system. Published app Meeting notes are shared across the workspace.

4 week review

Settling into the role. Find out how the first few weeks have felt and whether the basics are in place.

Colleague _____ Role _____

Manager _____ Meeting date _____

Manager purpose: help this person succeed in their role. Listen, clarify expectations and agree the support you will provide.

How has it been so far

What have you enjoyed most? What has been harder than you expected?

What feels clear and what still feels uncertain

Can you explain the main expectations of your role in your own words?

What would help you do the job well

Consider information, equipment, training, time and someone to ask for help.

What progress should we recognize

What are you pleased with? Share specific feedback you have received.

What do you need from your manager

Is there something I should explain, arrange or do differently?

Continue on the next page to record feedback, commitments and the next review.

4 week review actions

Complete this page together. Give each action an owner and a date.

Colleague _____ Role _____

Manager _____ Meeting date _____

Manager feedback and colleague response

Record specific examples, their context and any difference in views.

What will happen	Who will do it	By when	How we will check

My commitment as the manager

What help will I provide or arrange, and by when?

The colleague's next step

What will they work on, with what support?

Next conversation: week 8 Date _____ Earlier check-in if needed _____

Notes shared on _____ Colleague corrections or additions _____

Manager _____ Colleague _____

8 week review

Building confidence. Check what has changed since week four and whether the promised support has arrived.

Colleague _____ Role _____

Manager _____ Meeting date _____

Manager purpose: help this person succeed in their role. Listen, clarify expectations and agree the support you will provide.

How has it been since the last review

What feels easier now? What is still taking more effort than expected?

What feels clear and what still feels uncertain

Where do you feel confident working independently, and where would guidance help?

What would help you do the job well

Review the actions from week four. What is complete, outstanding or no longer useful?

What progress should we recognize

What have you learned or improved? Which contributions may have gone unnoticed?

What do you need from your manager

Are your ideas heard? Have I provided the help I promised? What should change?

Continue on the next page to record feedback, commitments and the next review.

8 week review actions

Complete this page together. Give each action an owner and a date.

Colleague _____ Role _____

Manager _____ Meeting date _____

Manager feedback and colleague response

Record specific examples, their context and any difference in views.

What will happen	Who will do it	By when	How we will check

My commitment as the manager

What help will I provide or arrange, and by when?

The colleague's next step

What will they work on, with what support?

Next conversation: week 12 Date _____ Earlier check-in if needed _____

Notes shared on _____ Colleague corrections or additions _____

Manager _____ Colleague _____

12 week review

Succeeding beyond the first twelve weeks. Review progress across the first three months and agree the support and direction for the next stage.

Colleague _____ Role _____

Manager _____ Meeting date _____

Manager purpose: help this person succeed in their role. Listen, clarify expectations and agree the support you will provide.

How has it been since you joined

What are you most pleased with? What remains difficult or different from what you expected?

What feels clear and what still feels uncertain

Are the standards and priorities clear? Where do you still need practice or guidance?

What would help you do the job well

Review the actions from week eight. What training, equipment or support is still needed?

What progress should we recognize

Which skills, relationships or contributions have developed? Use specific examples.

What do you need from your manager

What should I keep doing or change? What would help you succeed over the next few months?

Continue on the next page to record feedback, commitments and the next review.

12 week review actions

Complete this page together. Give each action an owner and a date.

Colleague _____ Role _____

Manager _____ Meeting date _____

Manager feedback and colleague response

Record specific examples, their context and any difference in views.

What will happen	Who will do it	By when	How we will check

My commitment as the manager

What help will I provide or arrange, and by when?

The colleague's next step

What will they work on, with what support?

Next regular one-to-one: _____ Development follow-up: _____

Notes shared on _____ Colleague corrections or additions _____

Manager _____ Colleague _____