

New Hire Onboarding Checklist

For Small Business Owners



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2 - 4 WEEKS BEFORE START DATE



Job Offer & Paperwork

- Send a formal offer letter with job details, salary, start date, and benefits.
- Have the employee sign and return the offer letter.
- Complete any background checks, if required.
- Send a welcome email with first-day instructions.



Set Up Work Equipment & Access

- Order and set up computer, phone, or other devices.
- Create email and system logins (email, payroll, HR software).
- Provide access to team communication tools (Slack, Teams, etc.).
- Assign workspace (if applicable) with desk, chair, office supplies.

BEFORE THE FIRST DAY

Prepare Employee Documents

- W-4 (Employee's Withholding Certificate).
- I-9 (Employment Eligibility Verification) + required ID.
- Direct deposit authorization form.
- Non-disclosure agreement (NDA), if applicable.
- Employee handbook acknowledgment form.
- Benefits enrollment forms (health, retirement, etc.).
- Any state/local tax or employment documents.

Notify Team & Plan First Week

- Inform staff of the new hire's start date and role.
- Assign a mentor or buddy to help them adjust.
- Schedule introductory meetings with key team members.
- Prepare an orientation schedule and initial tasks.

FIRST DAY



Welcome & Introductions

- Greet the new hire in person or virtually.
- Provide a welcome kit (company swag, notebook, branded items).
- Conduct a quick office tour (or virtual office walkthrough).
- Introduce them to key team members and leadership.



Review Company Policies & Culture

- Go over the employee handbook (work hours, dress code, company policies).
- Explain company mission, values, and culture.
- Discuss code of conduct, harassment policies, and safety protocols.



Set Up HR & Payroll

- Ensure all HR forms and payroll details are completed.
- Provide details on health benefits, time-off policies, and perks.



Technology & System Training

- Train on company software, tools, and platforms.
- Review email, HR portals, and project management tools.
- Discuss IT policies, security measures, and password setup.



Set Role Expectations

- Review job responsibilities and key performance goals.
- Discuss short-term and long-term objectives.
- Address any initial questions about the role.

FIRST WEEK



Training & Shadowing

- Assign relevant training sessions or self-paced learning.
- Have the new hire shadow a team member for hands-on learning.
- Introduce them to company workflows and best practices.



Check-In Meetings

- Have a one-on-one meeting with their manager for feedback.
- Encourage them to share initial thoughts and ask questions.
- Review progress and provide early feedback and support.



Encourage Team Integration

- Arrange a team lunch, virtual meet-and-greet, or coffee chat.
- Encourage participation in team meetings and company events.
- Foster a welcoming and inclusive environment.

FIRST 30 DAYS

Ongoing Performance & Feedback

- Conduct a 30-day performance check-in.
- Discuss wins, challenges, and areas of improvement.
- Adjust training and role expectations if needed.

Encourage Employee Engagement

- Provide opportunities to get involved in projects and initiatives.
- Assign a stretch project to build confidence and skills.

Gather Feedback on Onboarding

- Ask for feedback on the onboarding experience.
- Make improvements based on new hire insights.

FIRST 90 DAYS

Schedule regular check-ins (60-day and 90-day reviews).

Set professional growth goals and learning opportunities.

Continue to build company culture and engagement.

Celebrate small wins and milestones!



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