Onboarding Checklists

Free Onboarding Checklists with AI customization. Industry-specific guidance for onboarding checklists. Build your checklist now.

Executive Onboarding Checklist

- ☐ Board introduction scheduled
- ☐ Strategic briefing prepared
- ☐ Key stakeholder meetings set
- ☐ Industry analysis provided
- ☐ Competitive landscape review
- ☐ Financial briefings scheduled
- ☐ Leadership team introductions
- ☐ Cultural immersion planned
- ☐ Media training if needed
- ☐ Executive coach assigned
- ☐ 100-day plan created
- ☐ Success metrics defined

Sales Team Onboarding

- ☐ CRM access and training
- ☐ Product knowledge training
- ☐ Sales methodology training
- ☐ Territory assignment
- ☐ Pipeline handover
- ☐ Pricing and discounting rules
- ☐ Competition analysis
- ☐ Sales tools training
- ☐ Shadowing opportunities
- ☐ First calls scheduled
- ☐ Quota discussion
- ☐ Commission structure explained

Technical Team Onboarding

- ☐ Development environment setup
- ☐ Code repository access
- ☐ Architecture overview
- ☐ Coding standards review
- ☐ Testing procedures
- ☐ Deployment process
- ☐ Bug tracking system
- ☐ Documentation wiki

- [ ] Security protocols
- [ ] Team workflows
- [ ] Sprint planning inclusion
- [ ] Technical mentorship

Customer Service Onboarding

- [ ] Help desk system training
- [ ] Product knowledge deep dive
- [ ] Common issues training
- [ ] Escalation procedures
- [ ] Communication guidelines
- [ ] Quality standards
- [ ] Customer empathy training
- [ ] System navigation
- [ ] Resource library access
- [ ] Shadow experienced reps
- [ ] Practice scenarios
- [ ] Certification requirements

Remote Employee Onboarding

- [ ] Equipment shipped
- [ ] Virtual welcome session
- [ ] Digital paperwork process
- [ ] Remote access setup
- [ ] Virtual team meetings
- [ ] Online training modules
- [ ] Digital collaboration tools
- [ ] Time zone coordination
- [ ] Communication protocols
- [ ] Virtual coffee chats
- [ ] Home office setup guide
- [ ] Engagement activities

Contractor Onboarding

- [ ] Contract execution
- [ ] Project brief provided
- [ ] Access provisioning
- [ ] Security clearance
- [ ] NDA signing
- [ ] Payment setup
- [ ] Deliverable clarification
- [ ] Communication channels
- [ ] Reporting requirements
- [ ] Tool access
- [ ] Team introductions

- [ ] End date confirmed

Intern Onboarding

- [ ] Program overview
- [ ] Learning objectives set
- [ ] Mentor assignment
- [ ] Project allocation
- [ ] Training schedule
- [ ] Performance expectations
- [ ] Networking opportunities
- [ ] Professional development
- [ ] Mid-point review scheduled
- [ ] Final presentation planned
- [ ] Evaluation criteria
- [ ] Future opportunity discussion

Vendor Onboarding

- [ ] Vendor registration
- [ ] Compliance verification
- [ ] Contract finalization
- [ ] Payment terms setup
- [ ] System access
- [ ] Contact establishment
- [ ] Service level agreements
- [ ] Performance metrics
- [ ] Communication protocols
- [ ] Training requirements
- [ ] Quality standards
- [ ] Review schedule

Partner Onboarding

- [ ] Partnership agreement
- [ ] Joint objectives defined
- [ ] Resource allocation
- [ ] Communication plan
- [ ] Co-marketing materials
- [ ] Training exchange
- [ ] System integrations
- [ ] Performance tracking
- [ ] Escalation procedures
- [ ] Regular reviews scheduled
- [ ] Success metrics
- [ ] Renewal planning

Board Member Onboarding

- ☐ Governance documents
- ☐ Board handbook
- ☐ Financial statements
- ☐ Strategic plans
- ☐ Committee assignments
- ☐ Meeting schedule
- ☐ Director insurance
- ☐ Conflict of interest forms
- ☐ Executive introductions
- ☐ Facility tours
- ☐ Industry briefings
- ☐ Legal obligations

Volunteer Onboarding

- ☐ Mission overview
- ☐ Volunteer handbook
- ☐ Background check
- ☐ Training schedule
- ☐ Assignment matching
- ☐ Safety procedures
- ☐ Code of conduct
- ☐ Scheduling system
- ☐ Supervision plan
- ☐ Recognition program
- ☐ Impact measurement
- ☐ Feedback process

Franchise Onboarding

- ☐ Franchise agreement
- ☐ Brand standards training
- ☐ Operations manual
- ☐ Marketing guidelines
- ☐ Financial reporting setup
- ☐ POS system training
- ☐ Supply chain introduction
- ☐ Quality standards
- ☐ Territory definition
- ☐ Grand opening planning
- ☐ Ongoing support structure
- ☐ Performance benchmarks