

Onboarding Checklist Templates

Phase 1: Before Day One (Pre-Boarding)

Task	What to do / why it matters	Owner	Completed
Send offer letter and employment contract for signature <i>(Compliance-critical)</i>	Send both documents promptly and make sure the contract is signed on or before day one.	Founder, HR, or office manager	<input type="checkbox"/>
Collect personal details	Gather bank details, home address, and emergency contact information so payroll and employee records can be set up correctly.	HR or office manager	<input type="checkbox"/>
Run Right to Work check and keep evidence <i>(Compliance-critical)</i>	Complete the check before employment starts and keep a clear record of the documentation.	Founder, HR, or office manager	<input type="checkbox"/>
Issue HMRC starter checklist <i>(Compliance-critical)</i>	Share the checklist early so payroll has the information needed to set the employee up correctly.	HR, finance, or office manager	<input type="checkbox"/>
Set up payroll record	Add the new starter to payroll in time for their first pay cycle.	Finance, HR, or office manager	<input type="checkbox"/>
Order equipment and set up accounts	Make sure the new starter has their laptop, email, Slack, and any role-specific tools ready before day one.	IT, office manager, or line manager	<input type="checkbox"/>
Assign a buddy	Choose someone the new starter can go to with day-to-day questions during their first few weeks.	Line manager	<input type="checkbox"/>
Send welcome email with day one logistics	Confirm when to start, where to go, who they'll meet, and anything they should prepare in advance.	Line manager or HR	<input type="checkbox"/>
Add to relevant team calendars	Add key meetings, introductions, and onboarding sessions so the right people know what is happening and when.	Office manager, HR, or line manager	<input type="checkbox"/>
Share the employee handbook	Send over the handbook before day one so the new starter can review key policies and expectations in advance.	HR or office manager	<input type="checkbox"/>
Schedule welcome meeting with line manager	Put time in the diary early so the new starter has a clear first point of contact from the start.	Line manager	<input type="checkbox"/>



Try Charlie for free

Start your free trial now

Onboarding Checklist Templates

Phase 2: Day One Onboarding

Task	What to do / why it matters	Owner	Completed
Health and safety induction <i>(Compliance-critical)</i>	Go through key health and safety information so the employee understands the procedures relevant to their role and workplace.	HR, office manager, or line manager	<input type="checkbox"/>
Data protection and GDPR briefing	Explain how to handle employee, customer, or business data properly from the start.	HR, line manager, or IT	<input type="checkbox"/>
Verify all compliance documents <i>(Compliance-critical)</i>	<ul style="list-style-type: none"> • Right to Work documentation • Employment contract signed • HMRC starter checklist • Health and safety induction • GDPR/data protection briefing 	HR, office manager, or line manager	<input type="checkbox"/>
Office or workplace tour, or virtual equivalent	Show the new starter around the workspace, or give them a virtual equivalent, so they know where things are and how the day-to-day setup works.	Line manager or office manager	<input type="checkbox"/>
IT setup walkthrough	Help the new starter log in, access key systems, and troubleshoot any setup issues on day one.	IT or line manager	<input type="checkbox"/>
Introduction to the team	Introduce the new starter to the people they'll be working with so they know who's who from the start.	Line manager	<input type="checkbox"/>
Review the first week schedule	Walk through meetings, training, and priorities for the week ahead so expectations are clear.	Line manager	<input type="checkbox"/>
Confirm probation period details	Explain how long the probation period lasts, how it will be reviewed, and what support the new starter can expect during that time.	Line manager or HR	<input type="checkbox"/>



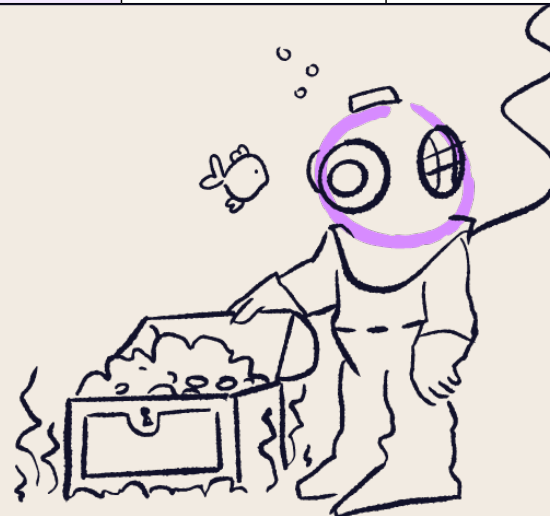
Try Charlie for free

Start your free trial now

Onboarding Checklist Templates

Phase 3: Week One Onboarding

Task	What to do / why it matters	Owner	Completed
Review the role and set initial goals	Go over the new starter's responsibilities, priorities, and short-term goals so they know what success looks like early on.	Line manager	<input type="checkbox"/>
Introduce key stakeholders	Make sure the new starter meets the people they'll work with regularly across the business.	Line manager	<input type="checkbox"/>
Confirm access to all required systems	Check that the new starter can access every system, tool, and document they need to do their job properly.	IT or line manager	<input type="checkbox"/>
Hold the first 1:1 with the line manager	Use the first 1:1 to answer questions, check how the first few days have gone, and spot any early blockers.	Line manager	<input type="checkbox"/>
Schedule any role-specific training	Set up any training the new starter needs for their role so learning doesn't get pushed back once the week gets busy.	Line manager or HR	<input type="checkbox"/>



Try Charlie for free

Start your free trial now

Onboarding Checklist Templates

Phase 4: Onboarding Follow-up (30/60/90 Days)

Task	What to do / why it matters	Owner	Completed
Hold a 30-day check-in	Ask how the new starter is settling in, what's going well, and whether anything is getting in the way early on.	Line manager	<input type="checkbox"/>
Run a 60-day review	Review role clarity, progress, and team integration so you can address any gaps before they become bigger problems.	Line manager	<input type="checkbox"/>
Complete the 90-day probation review	Use the probation review to assess performance, confirm next steps, and set clear objectives going forward.	Line manager or HR	<input type="checkbox"/>
Confirm ongoing development plans	Agree on the support, training, or goals that will help the employee keep growing after onboarding ends.	Line manager	<input type="checkbox"/>

Try Charlie for free

Start your free trial now

