

# Instruction Guide

## for your Onboarding Checklist

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Your Guide to Onboarding

[www.newlyonboard.com](http://www.newlyonboard.com)

# Step 1. Start with the bigger picture



**This Instruction Guide** doesn't attempt to design your entire onboarding strategy — that would require deep knowledge of your company, your people, and your ways of working. What it does give you is a structured set of questions and example tasks that help you uncover the unique elements of your organization.

Alongside this guide, you'll find a foundation of tasks for your onboarding checklist. Your task is to complete that checklist using the questions and examples in this guide.

**Think of this as a design tool:** a way to surface the decisions, rituals, expectations, and cultural nuances that make your company distinct. This is not an exhaustive list, but a set of examples to guide your thinking. Once those pieces are clear, the checklist becomes complete.

Some of the tasks in the list below are intentionally written as your to-dos — things you must define, gather, or design before the final checklist can exist. You'll see these **"meta-tasks"** embedded throughout the questions.

As you shape your onboarding, keep **five core elements** in mind: *Compliance, Role Clarity, Connection, Training & Feedback, and Culture.*

# Questions to Help you Complete your Onboarding Checklist

## **Compliance**

- **What must every new hire know or do to stay compliant?**

*Add tasks like: "Follow code of conduct training," "Understand reporting and escalation paths."*

## **Role Clarity**

- **What does great performance look like in this role?**

*Add tasks like: "Share performance rubric," "Provide examples of excellent work," "Define 90-day expectations."*

- **What do you want the new hire to know by the end of Week 1?**

*Add tasks like: "Share product overview," "Explain team structure," "Provide handbook link."*

- **What should they be able to do independently by Day 30?**

*Add tasks like: "Schedule CRM training," "Assign first project," "Provide SOP's."*

- **What tools or systems do they need access to?**

*Add tasks like: "Request Jira access," "Set up Slack," "Create email account."*

- **What should the new hire understand about our customers by Week 2?**

*Add tasks like: "Share customer personas," "Provide top customer insights," "Explain common customer challenges."*

## **Connection**

- **What do you want them to feel / experience on Day 1?**

*Add tasks like: "Prepare welcome message," "Organize team lunch," "Assign buddy."*

- **Who are the 3–5 people they must meet in their first weeks?**

*Add tasks like: "Schedule intro with Bob from Finance," "Book meeting with Product Lead."*

## **Training & Feedback**

- **What role-specific training must happen and when?**

*Add tasks like: "Schedule Jira training," "Assign product demo video."*

- **What tribal (unwritten) knowledge should be shared early?**

*Add tasks like: "Document team processes," "Add FAQ to Notion."*

## **Culture**

- **Which cultural rituals or habits should the new hire experience?**

*Add tasks like: "Invite new hire to Friday drinks," "Add stand-up to calendar."*

- **What unwritten rules or norms should be explained?**

*Add tasks like: "Add 'How we communicate' page to onboarding app."*

- **What behaviors are celebrated and which ones are discouraged?**

*Add tasks like: "Create 'How we succeed here' page," "List celebrated behaviors," "Document anti-patterns."*



## Step 2. Adapt the Checklist to Your Company Context

There is no universal onboarding checklist. Your company industry, culture and role types all influence what belongs on it. For example, a startup with 20 employees does not onboard the same way as a global enterprise. Here are some questions to guide your thinking:

### **What legal, regulatory, or industry-specific requirements apply?**

*Add tasks like: "Add industry compliance training," "Schedule certification sessions," "Provide regulatory overview."*

### **What is the maturity level of your organization?**

*Add tasks like: "Define which processes are still evolving," "Mark areas where onboarding must stay flexible," "Identify where documentation is missing and assign owners."*

### **What is the complexity of your product or service?**

*Add tasks like: "Add product deep-dive sessions," "Provide customer journey maps," "Create technical glossary."*

### **What is the social rhythm of the company (rituals, events, cadence)?**


*Add tasks like: "Document recurring events," "Add social calendar," "Explain participation expectations."*

# Step 3. Decide Where Your Onboarding Information Will Live

Before creating your onboarding checklist, you need to decide where all onboarding information will live. Different platforms, such as an onboarding app, intranet, or HRIS, serve different purposes, and the placement of each resource shapes the new-hire experience.

Some items may belong in the handbook on the intranet, others as tasks in a collaboration platform such as Notion, and formal documents in the HRIS. Defining this structure early ensures every checklist item appears in the right system and supports a smooth, coherent onboarding journey.

## **Here are some questions to guide your thinking:**

1. Where will each type of onboarding information live across your systems?
  2. Which platform will serve as the primary entry point for new hires?
  3. What information needs to be interactive vs. static?
  4. How will you keep information consistent across multiple platforms?
  5. Which system best supports role-specific onboarding?
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# Step 4. Clarify Ownership and Responsibilities

Defining ownership and responsibilities early on ensures that HR, managers, and supporting teams each understand their role in delivering a smooth onboarding experience.

## **Centralised vs. Manager-Owned**

Establish which elements are centralized and handled by HR versus what is manager-owned. HR may oversee the core process, but managers are often responsible for role-specific onboarding. In the onboarding checklist, you can easily assign ownership per task.

## **Mandatory vs optional**

It's equally important to define what is mandatory and what is optional. Marking required items, building an optional resource library, and confirming compliance expectations with HR helps prevent confusion and ensures new hires focus on what truly matters.

## **Cross-functional involvement**

Some onboarding steps also require cross-functional involvement, so identifying which teams need to contribute, assigning owners, and coordinating dependent tasks keeps the process running smoothly.

## **Keeping Content Up to Date**

Determine who is responsible for keeping onboarding content up to date. Assigning content owners, setting review cycles, and establishing a clear update process ensures the onboarding experience remains accurate, relevant, and aligned with how your company evolves.

# Final Notes

As you bring all the pieces of your onboarding design together, remember that the five core elements—*Compliance, Role Clarity, Connection, Training & Feedback, and Culture*—form the backbone of a decent onboarding experience.

They are derived from the broader 6 C's framework, designed by Talya Bauer and [described in one of my blogs](#).

Once your checklist is drafted, the real work begins: assessing whether it actually works. If you want more guidance on how to improve your onboarding, you can read my article [How to Assess and Improve Your Onboarding Program](#).

Good luck with finalizing your onboarding checklist!

