

# ONBOARDING CHECKLIST FOR MANAGERS

## Why is it important to prepare yourself?

A new employee's onboarding experience shapes their engagement, performance, and long-term success. Clear expectations, strong communication, and early relationship-building can significantly improve retention and productivity.

This checklist incorporates the 30-60-90 onboarding framework, breaking the transition into three phases: learning (days 1-30), contributing (days 31-60), and leading or executing (days 61-90).

By following this structured approach, you can create a supportive onboarding experience and make a strong first impression as a manager.

## Phase 1: Pre-boarding checklist

**Pre-boarding sets the tone before day one. Clear communication and preparation reduce uncertainty and ensure your new hire feels welcomed, informed, and ready to start.**

- Ensure the official welcome packet (offer confirmation, paperwork, IT setup instructions, and onboarding schedule) is sent
- Send a welcome email 2-3 days before the start date, confirming time, location, and first-day agenda
- Prepare workstation, tools, and system access (email, VPN, HR platforms) in advance, and ship equipment if necessary
- Provide company policies, including compliance training and security protocols
- Gather role-specific materials or project briefs for early review
- Assign a buddy or mentor to support informal onboarding
- Announce the new hire to the team and share their start date

## Phase 2: Orientation checklist

Phase 2 focuses on integrating the new hire into the team, processes, and company culture.

## Day 1: Setting the foundation

The first day is about creating a welcoming environment and ensuring your new hire has everything they need to get started, avoiding delays caused by system or administrative gaps.

- Welcome the new hire and introduce them to the team
- Host a welcome session (in person or virtual) to set the tone
- Schedule and conduct an initial one-on-one conversation
- Set clear expectations for the first day and week
- Provide an overview of the team, business, and key objectives
- Ensure access to all essential systems and tools
- Ensure completion of HR documentation (NDAs, benefits, compliance forms)
- Schedule team introductions (e.g. team lunch or meet-and-greet session)
- Add the new hire to key meetings, calendars, and recurring team check-ins

## First week: Supporting orientation

Focus on helping the new hire understand their role, the team, and how work gets done. This stage builds confidence and ensures they feel supported and clear on next steps.

- Provide company onboarding (culture, values, and how they are applied in practice)
- Clarify role responsibilities and immediate priorities
- Provide product or service training (key features, value proposition, audience)
- Explain team workflows, tools, and communication norms
- Introduce key stakeholders and points of contact
- Ensure the new hire receives PTO policies and key administrative information
- Schedule mandatory compliance and safety training
- Assign a starter project or task to build confidence and familiarity
- Finalise a structured onboarding plan (30–60–90 days roadmap)
- Organise a team social interaction (coffee chat, lunch, or virtual activity)
- Encourage buddy check-ins and informal support
- Hold an end-of-week informal check-in to gather feedback and address concerns

## Phase 3: Training checklist

Phase 3 focuses on applying the 30-60-90 framework to support progression from learning (days 1-30), to contributing (days 31-60), and ultimately to working independently through leading or executing tasks (days 61-90).

### First 30 days: Building alignment

In the first month, focus on aligning expectations, priorities, and performance goals. Clear direction helps the new hire build confidence and begin contributing effectively.

- Align on goals and success metrics for the first 30-90 days
- Review and reinforce the onboarding plan and priorities
- Establish a regular check-in cadence (weekly or bi-weekly)
- Provide early feedback and recognition
- Monitor progress on initial tasks or projects
- Address any open questions, blockers, or gaps
- Reinforce understanding of tools, processes, and expectations

### 60 days: Strengthening performance

At this stage, the new hire should be gaining confidence and contributing more consistently. Focus on deepening their understanding and refining performance.

- Review progress against initial goals and KPIs
- Provide structured, constructive feedback and coaching
- Encourage ownership of tasks, projects, and responsibilities
- Identify skill gaps and development opportunities
- Support deeper collaboration with stakeholders and teams
- Adjust onboarding or training plans if needed

### 90 days: Driving independence

By 90 days, the new hire should be fully integrated into the team and contributing independently, taking ownership of tasks and responsibilities.

- Evaluate performance against 90-day goals and expectations
- Provide formal feedback and recognise achievements
- Align on long-term goals and career development opportunities

- Adjust responsibilities based on strengths and performance
- Confirm next milestones and growth plan
- Gather feedback on the onboarding experience to improve future processes

## Additional tips:

### Create a sense of belonging early

Make time for informal interactions, both in person and remotely, such as coffee chats, quick check-ins, or group activities, to help the new hire feel part of the team.

### Be accessible and approachable

Encourage open communication and make it clear they can reach out for support.

### Observe and adapt your approach

Pay attention to how the new hire is adjusting and tailor your support accordingly.

### Recognise early contributions

Acknowledge small wins to build confidence and motivation.

## **Want to keep the momentum going? Explore more leadership resources:**

- [How to build an effective employee onboarding process](#)
- [Why quarterly reviews are better than annual evaluations](#)
- [How to give constructive feedback \(with examples for managers\)](#)

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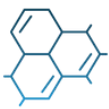
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