Employee onboarding checklist for the first week

An employee onboarding checklist for a team lead or buddy should answer two questions: what will the new colleague learn in the first week, and who will they meet? This kit gives 56 original actions in eight groups, from before day one to the 30-day check, a first-week plan by day, check-in questions and a filled example. It covers learning and relationships only; contracts, payroll and mandatory training stay with HR.

40 minutes | 2–8 participants | Online and adaptable in person

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The outcome

By the end of 40 minutes the lead and the buddy have a first-week plan by day, a checklist in which every item that applies has an owner and a date, one first task with a clear “done”, a list of five to eight people to meet, and three booked check-in conversations: the end of day one, the end of week one and day 30.

Before the session

- For team leads, trainers and onboarding buddies who plan a new colleague’s first week. The planning session is for 2–8 people: the lead, the buddy and, if you wish, the team. Hold it about a week before day one.
- This kit covers learning and relationships only. It does not cover contracts, right-to-work checks, payroll, tax, benefits, mandatory compliance or safety training, data protection duties or probation law. Those belong to HR and local law. Where an item touches such a topic, confirm with HR what is required.
- Print the four checklist pages and the first-week plan, or share the workbook tracker on screen. Bring the start date, the office and remote days, and any time that HR has fixed.
- Send the checklist as plain text a day early for screen-reader users, give silent reading time, and accept written contributions. Nobody has to take an item; passing is fine. Online, cameras are optional.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

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- Facilitator section: run of show, reference tables, debrief and adaptations

Checklist 1: before day one and day one

Write a name under Owner and a day under Date, and tick the box when the action is done. Strike what does not apply. “Usually” shows who most often does the action; change it to suit your team.

Done	#	Action	Usually	Owner	Date
		BEFORE DAY ONE			
☐	1	Send the new colleague a short welcome note with the start time, the place or link, and the name of the person who will meet them.	Lead		
☐	2	Ask a teammate to be the onboarding buddy, and agree how much time per day the buddy can give in the first week.	Lead		
☐	3	Choose one small, real task that the new colleague can finish in the first week, and check that it has a clear “done”.	Lead		
☐	4	Book the first-week meetings before the new colleague starts: the day-one welcome, a short daily check-in and the end-of-week conversation.	Lead		
☐	5	Tell the team who is joining, what the role is and when each person will meet the new colleague.	Lead		
☐	6	Confirm with HR what is required in the new colleague’s first week, and block that time in the plan before anything else.	Lead		
☐	7	Prepare a one-page guide to the team for the new colleague: who does what, which meetings happen when, and where the shared files are.	Buddy		
		DAY ONE			
☐	8	Meet the new colleague at the door, or open the call five minutes early, so that nobody waits alone on day one.	Lead		
☐	9	Walk through the first-week plan with the new colleague on day one, and ask what they would add or move.	Lead		
☐	10	Introduce the buddy on day one and say plainly what the buddy is for: everyday questions, with no question too small.	Lead		
☐	11	Show the new colleague on day one where things are: the team’s channels, the shared folders, the calendar and the place to ask for help.	Buddy		
☐	12	Take a break or eat lunch with the new colleague on day one, or arrange for a teammate to do so.	Buddy		
☐	13	Explain the new colleague’s first task on day one: its purpose, what “done” looks like, who can help and when you will look at it together.	Lead		
☐	14	Hold a ten-minute check-in at the end of day one, and ask the new colleague what was clear, what was confusing and what they need tomorrow.	Lead		

Checklist 2: the first days and the people

Write a name under Owner and a day under Date, and tick the box when the action is done. Strike what does not apply.

Done	#	Action	Usually	Owner	Date
		DAYS TWO AND THREE			
☐	15	Let the new colleague shadow a teammate on a routine piece of work on day two, and keep ten minutes afterwards for questions.	Buddy		
☐	16	Start a question log on day two: the new colleague writes each question down, and the buddy answers the list once a day.	New colleague		
☐	17	Explain to the new colleague three team habits that nobody has written down, such as how fast people reply and how they ask for a review.	Buddy		
☐	18	Invite the new colleague to a regular team meeting in the first three days, and explain beforehand what it is for and who speaks.	Lead		
☐	19	Give the new colleague a first piece of feedback by day three: one thing that works and one thing to try.	Lead		
☐	20	Ask the new colleague on day three to explain the team’s main process back to you, and fill the gaps you hear.	Buddy		
☐	21	Check on day three that the new colleague’s first task is moving, and remove one thing that blocks it.	Lead		
		MEETING PEOPLE			
☐	22	List the five to eight people the new colleague will work with most, and write one line on what each person does.	Lead		
☐	23	Book a 20-minute introduction between the new colleague and each key contact, and spread the meetings over the first five days.	Lead		
☐	24	Give the new colleague three questions for every introduction: what do you do, what do you need from my role, and how do you like to work?	Buddy		
☐	25	Tell the new colleague who decides what in the team, and who to ask when two requests clash.	Lead		
☐	26	Ask each teammate to tell the new colleague one thing about the work that they wish they had known in their own first month.	Buddy		
☐	27	Introduce the new colleague in the first week to one person outside the team whose work depends on the role.	Lead		
☐	28	Write down after each introduction who the person is, what they need from your role and one thing to follow up.	New colleague		

Checklist 3: the work and week one

Write a name under Owner and a day under Date, and tick the box when the action is done. Strike what does not apply.

Done	#	Action	Usually	Owner	Date
		LEARNING THE WORK			
☐	29	Write down the three things the new colleague should be able to do without help by the end of the first week.	Lead		
☐	30	List the tools the new colleague needs for the first task, and check before day one that each login works.	Buddy		
☐	31	Pick the five documents that matter most and put them in reading order, so that the new colleague does not face the whole archive.	Buddy		
☐	32	Agree with the new colleague which questions go to the buddy, which go to the lead, and which to try alone first.	Lead		
☐	33	Show the new colleague one finished example of good work for the role, and say what makes it good.	Lead		
☐	34	Keep a glossary of the team's abbreviations and project names in the first week, and add every new term you meet.	New colleague		
☐	35	Demonstrate a routine task once, do it together once, then let the new colleague do it alone while you watch.	Buddy		
		THE END OF WEEK ONE			
☐	36	Hold a 30-minute conversation with the new colleague at the end of week one, and let them speak first.	Lead		
☐	37	Review the first task with the new colleague at the end of week one: what is done, what was hard and what they learned from it.	Lead		
☐	38	Ask the new colleague at the end of week one which three things are still unclear, and give each one an owner.	Lead		
☐	39	Agree two or three learning goals with the new colleague for weeks two to four, each with a task that will show it.	Lead		
☐	40	Ask the new colleague what helped most in the first week, and what you should change for the next person who joins.	Lead		
☐	41	Go through the question log at the end of week one, and turn the repeated questions into a note for the next new starter.	Buddy		
☐	42	Set the rhythm for the weeks after week one: how often the lead and the buddy will each meet the new colleague.	Lead		

Checklist 4: remote starters and day 30

Write a name under Owner and a day under Date, and tick the box when the action is done. Strike what does not apply. The 30-day check is a learning conversation, not a probation review; confirm with HR what is required.

Done	#	Action	Usually	Owner	Date
		A REMOTE OR HYBRID STARTER			
☐	43	Send a remote starter the week's calendar invitations before day one, each with one line on what the meeting is for.	Lead		
☐	44	Plan a hybrid starter's office days around people: choose the days when most of the team is in.	Lead		
☐	45	Book two short calls with a remote starter on each remote day of the first week, one in the morning and one before the day ends.	Buddy		
☐	46	Open a video call for the first hour of a remote starter's day one, and stay on it while they set up.	Buddy		
☐	47	Agree with a remote starter how to ask a quick question: which channel to use, and how long a reply normally takes.	Buddy		
☐	48	Say clearly that cameras are optional, and offer a remote starter a written way to ask questions and give updates.	Lead		
☐	49	Share your screen while you do a routine task, so that a remote starter sees how the work is done and not only the result.	Buddy		
		THE 30-DAY CHECK			
☐	50	Book the 30-day conversation with the new colleague during the first week, so that it does not slip.	Lead		
☐	51	Note before the 30-day conversation what you can now do alone in the new role, and where you still need help.	New colleague		
☐	52	Compare the new colleague's first month with the learning goals agreed at the end of week one, and name what was reached.	Lead		
☐	53	Ask the new colleague at day 30 which working relationships are going well, and which people they have not yet met.	Lead		
☐	54	Agree the onboarding buddy's role after day 30: end it, reduce it or keep it for another month.	Buddy		
☐	55	Set two or three learning goals with the new colleague for the second and third month, with the support each one needs.	Lead		
☐	56	Update this onboarding checklist after day 30 with what you learned, so that the next new colleague gets a better first week.	Lead		

First-week plan at a glance

One row per day. Write the date and the place under each day. Keep each day to two introductions at most, and leave two hours without meetings for the first task.

New colleague: _____ Role: _____ Lead: _____ Buddy: _____

Day	Learning the work	People to meet	Check-in
Before day one			
Day 1			
Day 2			
Day 3			
Day 4			
Day 5			
Day 30			

Check-in questions for the new colleague

Choose two or three questions for each conversation. The new colleague can answer aloud or in writing, and can pass on any question. Note what you will do about each answer.

When	Question	Notes and next step
End of day one **10 minutes**	What was clear today, and what was confusing?	
	What do you need tomorrow that you do not have yet: a tool, a login, a document or a person?	
	Which part of the first task would you like to see done once before you try it?	
	Whose role is still unclear to you after today's introductions?	
	What is one question you did not get the chance to ask today?	
End of week one **30 minutes**	What can you now do without help that you could not do on day one?	
	Where did you lose the most time this week, and what would have prevented it?	
	Which of our team habits still puzzle you?	
	Who else do you need to meet, and what do you want to ask them?	
	What should we change in this first week for the next new colleague?	
Day 30 **45 minutes**	Which parts of the role do you now do alone, and which still need a second pair of eyes?	
	Which learning goal from week one did you reach, and what helped?	
	Which working relationships are going well, and where would an introduction still help?	
	What do you want to learn in the next two months, and what support would you need?	
	What do you see, as someone still new, that the team no longer notices?	

Filled example: first-week plan

A fictional example. A learning coordinator joins a training operations team of six on Monday 9 November 2026. The office days are Monday, Tuesday and Thursday. The first task is to write the joining instructions for a December workshop.

Day	Learning the work	People to meet	Check-in
Before day one **by Fri 6 Nov**	First task: joining instructions for a December workshop. Five documents in reading order. Logins tested.	Team told on 4 Nov. Six introductions booked.	Planning session, Tue 3 Nov, 40 minutes
Day 1 **Mon 9 Nov, office**	09:30 induction run by HR (not part of this plan). 11:15 welcome and week plan. 14:00 first task explained.	The buddy. Lunch with two teammates.	16:30, ten minutes, with the lead
Day 2 **Tue 10 Nov, office**	Shadow the buddy on a course booking. Read documents 1 to 3. Start the question log and glossary.	11:00 programme manager. 14:00 team meeting.	16:30, ten minutes, with the buddy
Day 3 **Wed 11 Nov, home**	A booking confirmation on a shared screen: shown, done together, done alone. First feedback from the lead.	Two trainers by video, 20 minutes each.	Buddy calls at 09:15 and 16:15
Day 4 **Thu 12 Nov, office**	09:30–11:30 no meetings: draft the joining instructions and send for review. Read documents 4 and 5.	13:30 finance contact (moved to Mon 16 Nov).	16:30, ten minutes, with the lead
Day 5 **Fri 13 Nov, home**	Apply the review comments. First task done by 12:00.	10:00 venue coordinator by video.	09:15 buddy call. 14:00 lead, 30 minutes
Day 30 **Wed 9 Dec**	Compare the month with the three learning goals agreed on 13 Nov.	Anyone on the list not yet met.	45 minutes, with the lead and the buddy

Filled example: progress at the end of week one

The same fictional team on Friday 13 November, after the end-of-week conversation. The team struck one item, so 55 of the 56 items apply. 45 are done: 82%.

Group	Items	Done	Share	What is open
Before day one	7	7	100%	—
Day one	7	7	100%	—
Days two and three	7	6	86%	Item 20, moved to Mon 16 Nov
Meeting people	7	6	86%	Item 27: contact away, moved to Mon 16 Nov
Learning the work	7	7	100%	—
The end of week one	7	5	71%	Items 41 and 42, for Mon 16 Nov
A remote or hybrid starter	6	6	100%	Item 46 struck: day one was in the office
The 30-day check	7	1	14%	Due in December; 54 to 56 have no owner
Total	55	45	82%	10 open, 3 without an owner, 2 overdue

Facilitator run of show

1 Open and name the limit | 4 minutes

Say: “We have 40 minutes to plan the first week of our new colleague. We plan two things: what they learn and who they meet. Contracts, payroll, mandatory training and everything else that HR owns are not ours to plan. We only keep that time free.” Show the four checklist pages and the blank first-week plan. Name the person who owns the plan after the meeting; usually that is the lead. If someone asks about a contract, pay or a mandatory course, write the question down for HR and move on.

2 Fix the frame of the week | 8 minutes

Three minutes: write the dates of day one, the fifth day and day 30 on the plan, with the office and remote days and any time that HR has fixed. Three minutes: agree the first task. It is small, real, can be finished by the fifth day and has a clear “done”. Two minutes: list the five to eight people the new colleague will work with most. Ask: “Who would they be stuck without in the first month?” Write the first task and the names at the top of the plan, where everyone can see them.

3 Strike what does not apply | 6 minutes

Four minutes of silent reading: each person reads the 56 items, marks the ones that do not apply and writes any missing action on the back of the sheet or in the empty rows of the tracker. Two minutes: agree aloud which items to strike. Strike an item only when everyone agrees. If the new colleague is in the office every day, the remote group goes.

4 Share out the items | 12 minutes

Go through the eight groups at about 90 seconds a group. For each item that remains, somebody says “mine”, and you write their name under Owner and a day under Date. Two rules: the lead takes no more than half of the items, and the items marked “New colleague” are offered on day one, not imposed. An owner is one person, never “the team”. If nobody takes an item, leave the Owner cell empty and move on.

5 Fill the week at a glance | 6 minutes

Four minutes: write the time that HR has fixed into the first-week plan first. Then copy the items that have a fixed time, day by day: learning the work, people to meet and the check-in. Two minutes: check the load. Say: “Is there a day with more than two introductions? Does each day have two hours without meetings for the first task?” Move items until both answers are right.

6 Read back and book the check-ins | 4 minutes

Two minutes: the lead reads the plan aloud, day by day, and the group decides about each item without an owner: someone takes it, or it is struck. Two minutes: put the daily check-ins, the end-of-week conversation and the 30-day conversation in the calendar now. Each person names the first item they will do, aloud or in the chat, or passes. Close by saying when the new colleague will see the plan: on day one, with room to change it.

Reference tables

What this checklist covers, and what it leaves to HR

Topic	In this kit?	What to do
What the new colleague learns in the first week	Yes	Use the groups “Learning the work” and “Days two and three”.
Who the new colleague meets, and when	Yes	Use the group “Meeting people” and the first-week plan.
The buddy, the daily check-ins and the 30-day learning conversation	Yes	Use the check-in questions and the group “The 30-day check”.
Contracts, right-to-work checks, payroll, tax and benefits	No	Confirm with HR what is required.
Mandatory compliance or safety training	No	Confirm with HR what is required, and keep that time free in the plan.
Data protection duties	No	Confirm with HR what is required.
Probation rules and probation reviews	No	Confirm with HR what is required.
Legal or HR advice of any kind	No	Those topics belong to HR and local law.

Debrief and next steps

Questions for reflection

- Which items did we strike, and what does that say about how this team works?
- Who owns the most items, and is that fair for the week they already have?
- Which day of the plan is the fullest, and what could move?
- What would the new colleague change in this plan if they were in the room, and when will we ask them?

Adapt the session

- For the lead alone, or the lead and the buddy: keep the 40 minutes, skip the round of “mine” and share out the items between the two of you. Send the plan to the team for comments in writing.
- For a 20-minute version, send the checklist a day early and ask each person to mark the items they will take. Use the meeting for the frame of the week, the items without an owner and the read-back.
- Online, share the tracker from the workbook on screen and let people type their names in the Owner column. Keep the chat open for people who prefer to write, and make cameras optional.
- For quiet participants and for people who work in a second language, keep the silent reading time, accept a name written in the Owner column as a full contribution, and do not ask anyone to explain why they pass on an item.
- For several new colleagues who start together, plan one shared week, run the introductions as a group, and keep a separate checklist and separate check-in conversations for each person.

After the session

Send the first-week plan and the checklist to everyone who owns an item within one working day. Show the plan to the new colleague on day one and change it with them. At the end of week one, count the ticks, move the open items to a new date or strike them, and ask the new colleague what to change for the next person.

After the 30-day conversation, update the checklist. A full set of ticks shows that the actions were done, not that the new colleague has settled; the check-in conversations tell you that.

Questions people ask

What should an employee onboarding checklist for the first week include?

For the team, it should include what the new colleague will learn, who they will meet and when someone will ask how it is going. This checklist has 56 actions in eight groups: before day one, day one, days two and three, meeting people, learning the work, the end of week one, a remote or hybrid starter, and the 30-day check.

Does this checklist cover contracts, payroll or compliance training?

This kit covers learning and relationships only. It does not cover contracts, right-to-work checks, payroll, tax, benefits, mandatory compliance or safety training, data protection duties or probation law. Those belong to HR and local law. This kit gives no legal or HR advice. Where an item touches such a topic, confirm with HR what is required.

Who does what: the lead, the buddy or the new colleague?

Each item shows who usually does it: 35 for the lead, 17 for the buddy and 4 for the new colleague. That is a starting point. In the 40-minute session the team shares the items out again, so that the lead holds no more than half.

How is this different from the training plan template and the delegation practice session?

The training plan template plans a programme of sessions with objectives and evidence for a group of learners. The leadership training activities kit has a role-play in which a leader delegates a new starter’s first week; it practises the briefing, not the week. The project kickoff agenda starts a project, not a person. This kit is the first week itself: the actions, the owners and the check-ins for one new colleague.

Does the checklist work for a remote or hybrid new starter?

Yes. One group of seven items is for a starter who works away from the team for part or all of the week: calendar invitations with a purpose, two short calls on each remote day, a shared screen for routine tasks and a written way to ask questions. Strike the items that do not apply.

What is included in the free and editable files?

The open PDF has the 56 items on four checklist pages with a tick box, an owner and a date column, the first-week plan, the check-in questions, a filled example and the 40-minute planning session. Subscribers also receive the editable Word file, an Excel workbook with a checklist tracker that counts done items per group, the share done, items without an owner and overdue items, and a CSV of the 56 items.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.