READY-TO-USE TEMPLATE

First-Week Onboarding With Care

A first-week checklist for the manager, buddy, and new starter.

30 minutes to prepare | First-week onboarding checklist

Use the supplied wording as it is, or change it together. The Word file and Notion template are editable. Keep only notes you need.

Before day one · Manager

Assign a named owner to each item before the person arrives.

[ ] Confirm start time, location or joining link, and whom to contact.
[ ] Ask what practical arrangements would help them participate; use the organization's support process where needed.
[ ] Check equipment and essential access.
[ ] Choose a buddy who has agreed and has time.
[ ] Plan a small useful task with context and a clear stopping point.

Day one · Welcome and orientation

Leave space between meetings.

[ ] Explain what the team does, who it helps, and why this role matters.
[ ] Show where to find essential information and how to ask for help.
[ ] Make introductions with context, not just names.
[ ] Explain required safety, security, and workplace procedures through the appropriate local process.
[ ] End with: What is still unclear? What would make tomorrow easier?

Notes and changes for our situation

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WORKING AGENDA / CONTINUED

Days two and three · Work alongside

Do not make the newcomer learn only by watching.

[ ] Walk through one real piece of work and explain the decisions.
[ ] Invite them to try a small part with support.
[ ] Name what they can decide and where to check.
[ ] Make room for questions without treating them as a test.
[ ] Ask what surprised them about the way work happens.

Days four and five · First useful contribution

Agree what good enough looks like and who will help.

Our first task:
Why it matters:
What a useful first version looks like:
Who can help:
When to stop and ask:
What we learned together:

Notes and changes for our situation

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WORKING AGENDA / CONTINUED

Friday · Listen before adding more

Use ten minutes to improve the onboarding itself.

What helped you feel able to contribute? Where did you have to guess? What information arrived too early or too late? What should we change for next week?

Manager's follow-through

Do not give every action back to the new starter.

Access or context I will arrange:
Introduction I will make:
Workload or schedule I will adjust:
Question I need to answer:
Next check-in:

The thinking behind it

A newcomer learns the culture through small experiences: whether questions are welcome, whether promises happen, and whether the work makes sense.

Read When Mattering Isn't Enough by Nic Payne

Keep the useful part

A shared record, not a transcript. Agree what belongs here and what should stay private.

Date / people / purpose

What we agreed

Next step / owner / support / date

What remains open

When we will return to it

Where are we expecting a newcomer to compensate for missing context?