



# Onboarding Checklist

**Design for Capability. Not Perfection.**

*Created by Vanessa Gentile, Founder of Bring Women Back to Work*

## Purpose

Onboarding is not administration.

It is not:

- setting up IT
- scheduling meetings
- handing over documents

It is the moment where:

- confidence is built—or lost
- clarity is created—or missing
- belonging begins—or never forms

This checklist ensures onboarding becomes: structured, intentional, and human

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## How to Use This Tool

Use this checklist across the first 90 days:

- Week 1 → Foundation
- Month 1 → Understanding

- Month 2 → Contribution
- Month 3 → Ownership

Review weekly between manager and employee.

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# Onboarding Checklist

## Before Day 1 — Preparation

**Goal:** Create clarity and readiness

- ✓ Role expectations clearly defined
- ✓ 30–60–90 plan prepared
- ✓ Access to systems and tools set up
- ✓ Calendar invites for first 2 weeks scheduled
- ✓ Manager, mentor, and buddy assigned
- ✓ Welcome message shared

*First impressions shape confidence*

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## Week 1 — Orientation & Belonging

**Goal:** Reduce uncertainty and create psychological safety

- ✓ Clear introduction to role and responsibilities
- ✓ Overview of team, structure, and key stakeholders
- ✓ Introduction to tools, systems, and workflows
- ✓ Daily check-ins with manager (short, focused)
- ✓ First simple task assigned (early win)
- ✓ Buddy support activated

*The goal is not performance—it is understanding*

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## Weeks 2–4 — Understanding & Integration

**Goal:** Build clarity and confidence

- ✓ Regular 1:1 meetings with manager (weekly)
- ✓ Shadowing team members and key processes
- ✓ Participation in meetings (active listening + contribution)
- ✓ Clear explanation of success metrics
- ✓ Feedback loops established
- ✓ First small deliverables completed

*Clarity reduces self-doubt*

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## **Month 2 – Contribution & Visibility**

**Goal:** Move from learning to doing

- ✓ Ownership of defined tasks or workstreams
- ✓ Active contribution in meetings
- ✓ Increased interaction with stakeholders
- ✓ Feedback provided and received regularly
- ✓ Strengths identified and reinforced

*Visibility builds confidence*

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## **Month 3 – Ownership & Momentum**

**Goal:** Build independence and impact

- ✓ Ownership of a project or key responsibility
- ✓ Clear measurable contribution delivered
- ✓ Strong working relationships established
- ✓ Self-confidence visibly increased
- ✓ Preparation for long-term role integration

*Momentum creates belonging*

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## **Manager Responsibilities (Critical Section)**

Managers play the most important role in onboarding success.

- ✓ Set clear expectations early
- ✓ Provide consistent, structured feedback
- ✓ Create psychological safety (questions are encouraged)
- ✓ Recognize progress—not only results
- ✓ Support visibility and integration

*People don't leave companies, they leave unclear environments*

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## **Early Warning Signals (Do Not Ignore)**

Watch for:

- ⚠ Silence in meetings
- ⚠ Lack of questions
- ⚠ Overworking / overcompensating
- ⚠ Low visibility
- ⚠ Unclear priorities

These are not performance issues.

They are onboarding failures.

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## **For Returners – What You Can Do**

If you are starting a new role:

- ✓ Ask for clarity early
- ✓ Build relationships intentionally
- ✓ Don't wait to feel ready to contribute
- ✓ Ask for feedback regularly
- ✓ Create small wins quickly

You don't need to prove everything.

You need to build momentum.

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## One Principle to Remember

Onboarding is not about information.

It is about: **confidence, clarity, and connection**

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## Final

Before closing the first 90 days, ask:

*“Does this person feel like they belong here?”*

Because performance follows belonging, not the other way around.

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**“Inclusion is not hiring. It’s what happens after.”**