

New Employee Onboarding Checklist

your marketing. 
Great Idea! Let's Get Started.

Employee Name: _____ Start Date: _____

Job Title: _____ Direct Leader (DL): _____

1. Welcome Email from Bo

Send 2 weeks prior to start date.

- ☐ Sent _____
- Direct Deposit
 - I9
 - Health Insurance
 - W4
 - KRA
 - Employee Handbook

2. Email from DL

Send 1 week prior to start date.

- ☐ Sent _____
- YMC Study Guide/Quiz
 - Local Restaurants
 - Parking
 - First Day Arrival

3. Welcome Text from DL

1 day prior to start date.

- ☐ Sent _____

4. Internal Setup

Minimum 1 week before employee start date.

- ☐ Setup email address – Bo
- ☐ Setup Basecamp – Bo
- ☐ Setup T Sheets – Bo
- ☐ Setup Stride – Bo
- ☐ Setup email on computer – DL
- ☐ Setup Basecamp, T Sheets, Slack on computer – DL
- ☐ Print DISC dot – Lead Designer
- ☐ Place DISC dot on board – Bo
- ☐ Set Up Trackstar – Bo
- ☐ Create Signature Block – Lead Designer

5. First Day

- ☐ Get #teamymc gifts (t-shirt, coffee mug, pen)
- ☐ Get office keys – Bo
- ☐ Review security system – DL
- ☐ Review KRA – DL
- ☐ Review payroll dates and system – DL
- ☐ Take picture for website, email, slack
- ☐ Meet fellow team members – Intro by DL
- ☐ Turn in all paperwork to Bo
- ☐ Intro to YMC One program from FLY participants
- ☐ Get computer – DL
- ☐ Lunch with DL/fellow team members
- ☐ Spend afternoon with project manager (as well as Lead Designer and Digital Director as needed) to review processes and Basecamp
- ☐ Distribute team contact info – Bo
- ☐ YMC Values – Bo
- ☐ Office Tour – Bo
- ☐ Distribute Best Practices Guide – DL
- ☐ Walk through how to use Insperity – DL

6. End of First Week

- ☐ KRA Review (to continue weekly for next 4–6 weeks)
- ☐ Team Lunch / TnD to celebrate new team member

7. Within First Month

- ☐ Professional Staff Photo. Scheduled: _____
- ☐ DISC Video/Review. Scheduled: _____

8. Within 90 Days

- ☐ Client Visit. Scheduled: _____