

# Virtual Onboarding Checklist

You've hired the best candidate for your association — now it's time to welcome them into their new remote workspace. Use this checklist as a guide to assist you in creating a thoughtful and structured plan for bringing on new staff.



## Before first day

Welcome email with first-day agenda

- how to report

- what documents to submit

- work schedule

Human Resources/essential forms to be completed

- tax forms

- legal forms

- job contract

- offer letter

- banking form for payroll/direct deposit

- retirement plan enrollment forms

- health plan enrollment forms

Training resources and link to any online training for new employees

- training to be completed

Create a schedule for first day and first week

Secure/Purchase devices and equipment

- computer with camera

- microphone

- phone

Employee added to email lists, calendars and internal meeting schedule

Set up access to all organizational internal/remote work accounts:

- project management (Trello, Asana, etc.)

- Zoom

- team messaging (Slack, Teams, etc.)

- calendar management (Calendly, Doodle, etc.)

- password manager

Help new employee feel welcome and a part of the team

- have the team introduce themselves to the new staffer (a video is a great way to make someone new feel welcome)

- send welcome swag (t-shirt, branded mug, etc.) with a thoughtful written note

## First week

IT meeting/session (ideally one of the first meetings of the first day)

- all electronic equipment is working properly
- able to sign on/has access to all accounts

Introduce new staffer to the team

schedule a meet and greet as a way for each employee as a way to get to know the new employee; this can be done one-on-one or as a team gathering (virtual/in-person lunch, coffee break or happy hour)

Association overview

provide new staffer with your association organization chart

- who's who
- hierarchy and leadership team

staff/association handbook

Schedule weekly one-on-ones and explain format and expectations

Review job expectations for projects

Review workplace culture, social norms, dress code and expectations around working hours (especially in remote setting)

Block out time for new staffer to complete all new hire training

- cybersecurity training
- Sidecar's "[Intro to Associations](#)"
- Sidecar's "[How to Set SMART Goals](#)"

30/60/90 day goals defined

- learning
- personal

30/60/90 day targets identified

- learning
- personal

30/60/90 day action plan created

- learning
- personal

30/60/90 day check-ins scheduled

Professional development opportunities identified

### 30 days after hire date

30-day goals reviewed

- learning
- personal

30-day action plan reviewed

- learning
- personal

Next 30-day expectations reviewed

Identify weaknesses and create plan to resolve any issues

Discuss and explore professional development opportunities

Identify a mentor for new staffer and introduce

### 60 days after hire date

60-day goals reviewed

- learning
- personal

60-day action plan reviewed

- learning
- personal

Next 30-day expectations reviewed

Identify weaknesses and create plan to resolve any issues

Discuss and explore professional development opportunities

Check in on mentorship fit

### 90 days after hire date

90-day goals reviewed

- learning
- personal

90-day action plan reviewed

- learning
- personal

Examine and celebrate successes

Identify weaknesses and create plan to resolve any issues

Discuss and explore professional development opportunities

Check in on mentorship fit