

ONBOARDING JOURNEY CHECKLIST



Onboarding is a team responsibility, so you may want to work through this checklist with your colleagues to make sure they understand and buy into the entire process.

BEFORE DAY ONE

- Put one person in charge of the onboarding process
- Set up a workspace for the student, close to other team members
- Prepare HR and payroll forms
- Get familiar with the documentation required by the university partner
- Acquire all the tools and technology (including permissions) the student will need to access the workplace and do their job
- Update the job description
- Prepare a package of orientation materials
- Announce the student's arrival
- Schedule meetings with HR and leadership
- Plan meet-and-greet opportunities (if possible, include a team lunch)
- Communicate Day One expectations to the student

NOTES

DAY ONE

Note: The checklist presents items in random order; it doesn't imply any chronological sequence.

Meet the student as soon as they arrive at the workplace

Share the agenda for the day

Share the organizational chart and any other documents that help the student understand how their role contributes to the overall mission and priorities

Review the job description, clarifying duties and responsibilities, including reporting requirements and performance expectations

Take the student on a workplace tour, introducing them to colleagues as you go, especially those they'll be working closely with

Introduce the student to their mentor and give them time to get acquainted

Provide a list of jargon terms and acronyms

Provide a list of key contacts

Discuss the best way for you and the student to communicate

Enjoy a team lunch!

Chaperone the student through meetings with HR and leadership

Engage the student in a small piece of authentic work

NOTES

ONGOING ONBOARDING

Provide frequent feedback

Allow opportunities to reflect and identify lessons learned

Gradually increase task difficulty and complexity

Facilitate social connections with the immediate team and other colleagues

Coach the student in specific areas of performance where you'd like them to improve or see potential for them to stretch

Track progress toward the student's learning goals

Complete documentation required by the university partner

Provide mentorship

Involve the student in meetings and special events

Celebrate achievements!

NOTES