IT onboarding checklist | Workable

Use this checklist to organize effective IT onboarding sessions for your new hires:

Before your new hire's first day

- Coordinate with the hiring manager and the HR department to collect information that will help you prep IT setup. Make sure you have new hires':
    - Names
    - Contact details
    - Job titles
    - Departments
    - Starting dates
    - Software they'll need for their jobs

- Order equipment new hires will need, including:
    - Laptop
    - Monitor
    - Mouse
    - Keyboard
    - Cables
    - USB sticks
    - Phone

- Determine which software, tools and access rights new hires need. This can include:
    - Company email
    - Internal messaging
    - Productivity tools (e.g. Trello, ToDoist, Asana)
    - Analytics (Tableau, Google Analytics)
    - Spreadsheets

- Get approval from the senior management team to set up new accounts.

- Invite new hires to join corporate accounts and send them setup guidelines.

- If applicable, contact new hires or their hiring managers to learn their preferred tech equipment.

On your new hire's first day

- Prepare new hires' desk with necessary hardware, like:
    - Computer
    - Phone

- Printer
- Notepads
- Pens
- Paper

- Schedule 1:1 meetings to help new hires properly:
  - Set up company accounts, if they haven't already:
    - Email
    - Company messaging
    - Password security (e.g. LastPass)

  - Configure WLAN connection settings (computer and mobile)
  - Install anti-virus software

- Provide digital or physical copies of manuals for hardware and software so that new employees can reference them when needed.

- Explain how to use corporate office equipment, like:
  - Projectors
  - Video conference tools
  - Printers
  - Fax machines

- Ensure all new hires understand and sign data privacy agreements.

- Describe visitors policy.

- Train new hires on how to secure their workstations. For example, make sure they know:
  - How to store physical and digital files
  - How to share sensitive data
  - How to lock their computer and desk

- Explain how new hires should reach you if they have any technical issues. Include your:
  - Location
  - Email and phone
  - Username, if you communicate via a messaging application
  - Formal procedure to request technical assistance

During new employee's first week or month

- Check in with new hires to see if they've properly installed all software.

- If necessary, schedule trainings on:

- Security policies
- Best practices when using office equipment
- Productivity tips for commonly used tools

- Answer specific questions new hires may have after using tools for a while.

- Sign new hires up for routine security training exercises.