EMPLOYEE ONBOARDING CHECKLIST

Brightwave Analytics

EMPLOYEE NAME	Maya Thompson	START DATE	12/01/2026
POSITION	Marketing Coordinator	HR CONTACT	Priya Shah
DEPARTMENT	Marketing	ONBOARDING BUDDY	Alex Kim
MANAGER	Daniel Ruiz	WORK LOCATION	Hybrid — Austin, TX

01

Before Day 1
Preboarding

	TASK	OWNER	DUE	NOTES
■	Send signed offer letter and start-date confirmation	HR	11/14	Signed 11/14
■	Send welcome email with first-day details	MANAGER	11/24	Parking + agenda
■	Order laptop, monitor and headset	IT	11/24	MacBook Pro 14"
☐	Create email, Slack and HubSpot accounts	IT	11/28	
☐	Assign onboarding buddy	MANAGER	11/28	Alex Kim
☐	Prepare desk and welcome kit	HR	11/28	

02

Day 1
Orientation - 12/01

	TASK	OWNER	DUE	NOTES
☐	Welcome meeting and office tour	MANAGER	12/01	9:00 AM
☐	Collect I-9 identity documents	HR	12/01	Within 3 days
☐	IT setup and security training	IT	12/01	
☐	Team introductions and lunch	BUDDY	12/01	Team table, 12:30
☐	Review the employee handbook	EMPLOYEE	12/01	

03

Week 1
12/01 – 12/05

	TASK	OWNER	DUE	NOTES
☐	Walkthrough of tools and processes	BUDDY	12/03	
☐	First 1:1 with manager — role expectations	MANAGER	12/04	
☐	Complete compliance training	EMPLOYEE	12/05	LMS
☐	Benefits enrollment	HR	12/05	30-day window

04

First 30 / 60 / 90 Days
Through 03/01/2027

	TASK	OWNER	DUE	NOTES
☐	30-day check-in and feedback	MANAGER	12/31	
☐	Agree on 60-day goals	MANAGER	01/30	
☐	Lead first campaign task	EMPLOYEE	01/30	
☐	90-day review — end of probation	MANAGER · HR	03/01	

DOCUMENTS CHECKLIST

	DOCUMENT	RECEIVED
■	Form I-9 — Employment Eligibility Verification	12/01
■	Form W-4 — Tax Withholding	11/20
■	Direct Deposit Authorization	11/20
■	Emergency Contact Form	11/20
☐	Employee Handbook Acknowledgment	
■	Confidentiality Agreement (NDA)	11/14

SIGN-OFF

EMPLOYEE _____ DATE _____

MANAGER _____ DATE _____

HR _____ DATE _____

KEY CONTACTS

ROLE	NAME	EMAIL	PHONE
Manager	Daniel Ruiz	d.ruiz@brightwave.com	(512) 555-0140
HR Contact	Priya Shah	people@brightwave.com	(512) 555-0141
IT Help Desk	Service desk	it@brightwave.com	(512) 555-0142
Onboarding Buddy	Alex Kim	a.kim@brightwave.com	(512) 555-0143

NOTES

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