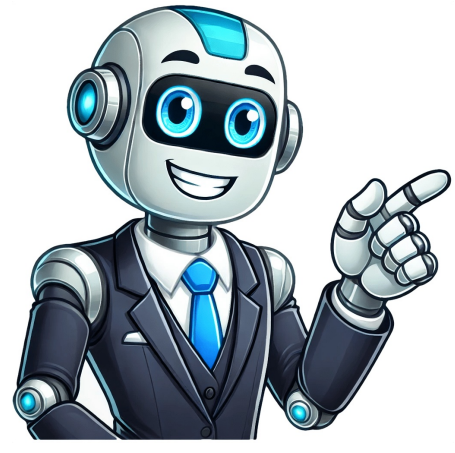


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When to Use This Template:Use this checklist template to help standardize the onboarding process and reduce errors. You can use this template across departments to align HR and hiring managers, as well as improve the new hire experience.  
Notable Template Features:This comprehensive template provides space to leave status updates and track all onboarding tasks, from preboarding to the first day to the 90-day mark. The template tables include space to note task description, assignment, due date, and notes.  
Learn more about onboarding tools, resources, and benefits from HR experts with thiscomplete guide to employee onboarding. Download an Onboarding Schedule Template forExcel | Google SheetsWhen to Use This Template:This template outlines tasks and activities for structured onboarding programs over time. List and schedule all steps in your onboarding process so that the entire organization can clearly understand the sequence of tasks.  
Notable Template Features:This onboarding schedule template features a comprehensive timeline for scheduling tasks in quarterly, monthly, and weekly columns for the entire year. Use the spreadsheet rows to create a complete listing of all onboarding tasks and activities.  
Learn more about onboarding and offboarding, their program stages, and what to consider with thisonboarding and offboarding employee lifecycle resource. Download an Onboarding Welcome Email Template forMicrosoft Word | Google DocsWhen to Use This Template:Use this email template to standardize the process of welcoming new hires to your organization. The template prompts you to create standard communication beginning one to two weeks before an employee's start date or immediately after they accept the job offer.  
Notable Template Features:This template features space to share first-day details, expectations, and action items with links for digital forms, email setup, and employee handbook resources.  
Check out this collection ofemployee development plan templates to help you set goals, outline action steps, and track employee development progress. Download Blank and Sample Versions of a New Hire Onboarding Plan Template for Excel Download a Sample New Hire Onboarding Plan Template forMicrosoft Word |PowerPoint Download a Blank New Hire Onboarding Plan Template forMicrosoft Word |PowerPoint When to Use This Template:This onboarding plan template helps teams outline their onboarding process to ensure a consistent experience for all new hires.  
Notable Template Features:This template features space to list objective descriptions, role responsibilities, and focus areas across the preboarding, orientation, and integration onboarding phases. TheNext Steps table outlines long-term goals and the actions to achieve them.  
Learn more about the onboarding process, mutual benefits, and simple tools, as well as how to earn team buy-in with this resource foremployee onboarding processes, plans, best practices, and flowcharts. Download Blank and Sample Versions of a 30-60-90 Day Onboarding Plan Template forExcel |Microsoft Word | Google Docs | Google SheetsWhen to Use This Template:Use this template to structure onboarding in an employees first 30, 60, and 90 days. This template works well for planning and tracking professional development, goals, and performance for the first three months of employment.  
Notable Template Features:This onboarding plan template features space to outline outcome categories across the three time frames. It includes aMilestones Overview section, describing focus areas and objectives, and anAction Plan section for planning and tracking tasks at the 30-, 60-, and 90-day marks.  
Check out thisnew employee onboarding template set from Smartsheet to help you personalize onboarding, schedule onboarding tasks, track progress, and centralize onboarding assets. Download a Blank 30-60-90 Day Onboarding Plan Presentation Template forPowerPoint | Google SlidesDownload a Sample 30-60-90 Day Onboarding Plan Presentation Template forPowerPoint | Google SlidesWhen to Use This Template:This template is ideal for new hire orientation sessions and HR meetings. It presents milestones and other onboarding focus areas and tasks.  
Notable Template Features:This presentation template features focus area descriptions and action plan tasks in dedicated presentation slides. TheMilestones Overview section includes space to describe onboarding objectives at 30, 60, and 90 days. Download an Onboarding Tracking Template forExcel | Google SheetsWhen to Use This Template:Use this template to track onboarding tasks for multiple new hires simultaneously. This onboarding tracking template is ideal for large-scale hiring and remote teams.  
Notable Template Features:This template features columns for five new hires, as well as job title, department, start date, and employee ID number for each. It also categorizes and tracks tasks from preboarding and the first week to the 90-day mark. Download an HR Onboarding Checklist Template forExcel |Microsoft Word | Google Docs | Google SheetsWhen to Use This Template:HR departments can use this template to manage and track administrative and compliance onboarding activities. Its a great tool to use to minimize compliance risks and ensure a structured onboarding process.  
Notable Template Features:This template features space to note the new employees name, ID number, email, start date, remote/in-office status, and other employee information. The template columns list onboarding activities statuses, monitors, and notes, preventing delays and missed onboarding steps. Download an Onboarding Checklist for Managers Template forExcel |Microsoft Word |PowerPoint When to Use This Template:Hiring managers can use this template to actively onboard new hires. Its a great tool for improving team integration and outlining employee performance goals at the outset.  
Notable Template Features:This template includes columns to note the status of each task and activity at every stage of the onboarding process. The onboarding checklist covers all onboarding tasks, including those from before the start date to the first week through the 90-day employment mark. Download a Remote/Hybrid Onboarding Checklist Template forExcel | Google SheetsWhen to Use This Template:This checklist template works well for onboarding remote and hybrid new hires to promote engagement and retention. It ensures employees experience a complete onboarding program despite not being in the same geographic location.  
Notable Template Features:This template includesOwner andStatus Update fields for all onboarding tasks, from preboarding through the 90-day mark. TheCommunication Guidelines section lists the procedures necessary for remote/hybrid employees. Download an Executive Onboarding Plan Template forExcel |Microsoft Word When to Use This Template:This template is ideal for executive onboarding to ensure strategic alignment from the get-go. Use it to help executives transition into organizational leadership roles successfully.  
Notable Template Features:This comprehensive template includes space to detail all onboarding objectives and actions, from preboarding through the first year. It includes development goals and stakeholder engagement fields that describe action plans, engagement purposes, and statuses. Download a Customer Onboarding Checklist Template forExcel |Microsoft Word | Google Docs | Google SheetsWhen to Use This Template:HR departments can use this template to manage and track administrative and retention. The template guides new customers through setup and training so that you can ensure an easeful and professional start to the relationship.  
Notable Template Features:This template featuresTask,Owner, andStatus fields for new account setup, needs analysis, and product education. It also features anOngoing Engagement and Retention section that you can use to track customer engagement. Download a Client Onboarding Checklist Template forExcel |Microsoft Word | Google SheetsWhen to Use This Template:Use this checklist template to manage and personalize the client onboarding process. It helps ensure smooth transitions and practical expectation settings.  
Notable Template Features:The top of the template includes space to note the industry, the primary contact for the account, the account manager, the start date, and other client data. Then use the template to track task statuses in thePreparation, Setup, Welcome,andInitial Engagement through theFinal Reviewand Long-Term Strategy sections. Download a Buddy/Mentor Onboarding Checklist Presentation Template forPowerPoint | Google SlidesWhen to Use This Template:Use this checklist presentation template to guide buddies, mentors, and new hires through onboarding. This template works well for mentoring or buddy programs, as well as for peer coaching.  
Notable Template Features:This template features an overview slide where you can describe the buddy or mentor's onboarding responsibilities. It includes dedicated checklist slides for the first week and the 30-, 60-, and 90-day marks. Download an Employee Onboarding Form Template forExcel |Microsoft Word |Adobe PDF | Google Docs | Google SheetsWhen to Use This Template:This employee onboarding form template streamlines HR documentation and compliance. Use it to collect new employee information.  
Notable Template Features:This printable template features a confidentialPayroll and Tax Information section for you to document the pay schedule, payroll method, bank account, and routing numbers. This onboarding form also includes sections for contact information and employee details. Download a Blank Onboarding Training Plan Template forExcel |Microsoft Word |Adobe PDF | Google SheetsDownload a Sample Onboarding Training Plan Template forExcel |Microsoft Word |Adobe PDF | Google SheetsWhen to Use This Template:This training plan template introduces company policies and expectations for new hires. Use it to boost employee engagement and minimize turnover, as well as a new employee training plan template.  
Notable Template Features:The Onboarding Training Schedule section describes the details of new hire orientation, integration, and long-term development. It includes space for improvement areas and follow-up based on evaluation criteria. Companies can use formal or informal onboarding techniques to help new hires adjust to their role and perform well.  
Formal onboarding follows a set plan with training and checklists, whileinformal onboarding is flexible, using team tasks and support to teach.Both onboarding plan types have key benefits:Formal onboarding uses a clear plan with steps, guides, and set training.Informal onboarding relies on real-world work, peer help, and hands-on learning.Formal methods ensure full training, fewer mistakes, and clear role understanding.Informal methods help employees adapt fast and learn through daily work.Both styles help new hires adjust, grow, and succeed. A well-balanced onboarding plan blends structure and hands-on learning for the best results.Choosing the right mix depends on company goals, culture, and job needs. An onboarding process helps new hires adjust quickly, feel engaged, and perform well. The best programs mix clear steps, team support, and tasks. Companies that follow onboarding best practices give employees the tools to grow and succeed.  
Here are some best practices for a successful onboarding program:Start early by sending a welcome email and preboarding tasks before the first day.Set clear goals so that new hires know their role, team, and company missionUse a structured plan with training, checklists, and regular check-ins.Encourage team support with mentors, peer guidance, and networking.Provide real tasks early to build confidence and hands-on learningA strong onboarding plan blends structure, training, and team support. When done right, it helps new hires grow fast, stay engaged, and drive company success. Empower your people to go above and beyond with a flexible platform designed to match the needs of your team and adapt as those needs change. The Smartsheet platform makes it easy to plan, capture, manage, and report on work from anywhere, helping your team be more effective and get more done. Report on key metrics and get real-time visibility into work as it happens with roll-up reports, dashboards, and automated workflows built to keep your team connected and informed. When teams have clarity into the work getting done, theres no telling how much more they can accomplish in the same amount of time.Try Smartsheet for free, today. Try Smartsheet for Free Get a Free Smartsheet Demo Share copy and redistribute the material in any medium or format for any purpose, even commercially. Adapt remix, transform, and build upon the material for any purpose, even commercially. The licensor cannot revoke these freedoms as long as you follow the license terms. Attribution You must give appropriate credit , provide a link to the license, and indicate if changes were made . You may do so in any reasonable manner, but not in any way that suggests the licensor endorses you or your use. ShareAlike If you remix, transform, or build upon the material, you must distribute your contributions under the same license as the original. No additional restrictions You may not apply legal terms or technological measures that legally restrict others from doing anything the license permits. You do not have to comply with the license for elements of the material in the public domain or where your use is permitted by an applicable exception or limitation . No warranties are given. The license may not give you all of the permissions necessary for your intended use. For example, other rights such as publicity, privacy, or moral rights may limit how you use the material.

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