

## **General New Hire Onboarding Checklist for Offshore Roles**

### **1. Preboarding Checklist**

- Send the job offer and collect signed documents
- Share welcome email with:
  - Start date and manager details
  - What to expect on Day 1
  - Company mission and values
- Assign an onboarding buddy or peer mentor
- Provide calendar invites for onboarding sessions
- Ship equipment (laptop, headset, etc.)
- Set up work accounts (email, Slack, HRIS, tools)
- Grant access to shared drives and key resources
- Confirm completion of required documents:
  - ID verification, tax forms (as applicable)
  - Emergency contact form
  - Employee handbook acknowledgment

### **2. Orientation Checklist**

- Host live or async orientation session
- Introduce company values, structure, and culture
- Explain benefits and compliance protocols
- Walk through essential tools and systems
- Provide role clarity and success metrics
- Review key policies:
  - Data security
  - Communication etiquette
  - DEI and accessibility
- Arrange team introductions or a virtual meet-and-greet
- Share org chart and internal FAQs
- Encourage social connection through peer chats or channels

### **3. Training and Role Alignment Checklist**

- Provide SOPs, role-specific manuals, or knowledge base access

- Assign training modules or shadowing sessions
- Clarify KPIs and immediate deliverables
- Schedule weekly manager syncs during first month
- Deliver product or service onboarding (if applicable)
- Align tools with role needs (CRM, analytics, design tools, etc.)
- Share example work and performance benchmarks
- Invite new hire to key project channels or meetings

## **180-Day Hypercare Check-ins (Updated Penbrothers Framework)**

### **Phase 1: Foundation and Integration**

**Goal:** Build clarity, confidence, and workflow readiness.

- Weekly check-ins with Account Manager and/or Client Manager
- Early Performance Review (clarify expectations, assess initial contributions)
- Coaching and support for blockers, communication style, and tool usage
- Workflow and team integration (SOPs, process adoption, team syncs)
- Early quality and accuracy monitoring
- Set clear goals for Days 30–60 and establish early success metrics

### **Phase 2: Performance Alignment**

**Goal:** Strengthen collaboration, consistency, and speed of delivery.

- Bi-weekly performance reviews
- Workflow optimization (speed, accuracy, SOP adherence)
- Skill calibration and deeper coaching on task ownership
- Cross-team collaboration strengthening
- Re-alignment of goals based on actual performance
- Reinforcement of communication norms and accountability

### **Phase 3: Autonomy and Retention**

**Goal:** Build independence, engagement, and long-term stability.

- Monthly performance reviews
- Career development planning (skills, upskilling paths, stretch assignments)
- Readiness assessment for long-term responsibilities
- Transition to self-management with minimal supervision
- Retention checkpoints to detect early risks
- Support from Account Managers for performance issues, role adjustments, or scaling
- Long-term goal setting for post-Day 180 development