



Template: Onboarding Document, Equipment and Systems Checklists

This checklist outlines the general items that apply to every employee as well as team-specific apps. If you have any questions about a specific checklist item follow up with the person via Slack (like @Statler for Gmail).

Org-Wide

Salary/Wages/Mandatory Agreements

Use this section to outline what every employee needs to sign/submit, and indicate the portal/database [ex: Gusto, Zenefits, ADP] in which that needs to happen. Examples are below.

- *Document - PORTAL*
- W4 - ADP
- Direct Deposit -
- I-9 -
- Non-Compete/PIIA -
- ISO Grant/Agreement -
- Information Security Policy -
- Workplace Guide -
- Insurance Enrollment/Waiver -
- Additional Benefits Enrollment/Waiver -



Equipment/Facilities

Use this section to outline what every employee will be provided. Examples are below.

- Desk and Chair
- Laptop
- Monitor/Keyboard/Mouse/Laptop Stand
- Building keys/access cards & office suite keys
- Headset (if applicable)

Internal Applications

Use this section to outline what every employee will be provided, and who can grant access. Examples are below.

- *Application - Owner*
- Gmail, calendar and drive - @statler
- Zoom - @statler
- Guru - @statler
- Expensify (Expense Reports/Reimbursements) - @waldorf
- Slack (Internal Communication & Collaboration) - @statler
- Openpath - @statler
- Asana - @statler
- Sonos (Music) - [download the app here](#), no permission needed 🎵

Individual Teams

Sales Team Apps

- Salesforce - @sterling
- LinkedIn Sales Navigator - @cooper
- Gong - @sterling
- Calendly - @derek



CS Team Apps

- Zendesk - @janet
- Intercom - @janet
- Calendly - @derek

Marketing Team Apps

- Hubspot - @peggy
- Adobe Creative Cloud - @peggy
- Ahrefs - @draper

Engineering Team Apps

- AWS - @scotty
- Clubhouse - @geordi
- Pull Reminders - @miles
- Geekbot - @stamets