

Onboarding Checklist

System: SOPs + Onboarding System for Remote Teams (100 Staff Scale)

Purpose

Standardize how new team members integrate into the company, adopt the ops stack, and execute confidently in an async-first environment.

Section 1: Pre-Start (Week -1) – Manager / Ops Responsibility

- ☐ Create role profile (responsibilities, success metrics, reporting lines).
- ☐ Assign buddy/mentor from within team.
- ☐ Provision accounts: email, Slack/Teams, HRIS, payroll, security tools (MFA).
- ☐ Add to org chart + team structure (Notion/Confluence).
- ☐ Pre-load role-specific SOPs + playbooks in onboarding portal.
- ☐ Send Welcome Pack: role overview, culture guide, onboarding timeline.

Deliverable: New hire has logins + clear Day 1 plan before arrival.

Section 2: Day 1 – Culture + Orientation

- ☐ Welcome call with manager + buddy.
- ☐ Company story + values briefing (deck or async video).
- ☐ Walkthrough of team structure and reporting lines.
- ☐ Intro to async-first principles: documentation, ownership, decision logs.
- ☐ Confirm access to comms tools, project management system, SOP library.

Deliverable: New hire understands mission, values, and how the company works day-to-day.

Section 3: Week 1 – Systems + SOP Familiarization

- ☐ Systems training: project management, knowledge base, CRM, analytics tools.
- ☐ Walkthrough of SOP library: navigation, update process, versioning rules.
- ☐ Hands-on shadowing task using SOP.
- ☐ Async execution training: log blockers, escalate issues, document updates.
- ☐ Security orientation: password policies, compliance rules.

Deliverable: New hire can independently find SOPs, complete tasks, and update progress async.

Section 4: Week 2-4 – Role Ramp-Up

- ☐ Review role-specific playbook (metrics, workflows, KPIs).
- ☐ Complete task ladder from simple to complex SOP-driven tasks.
- ☐ Participate in 1:1 with manager to set first 30-day goals.
- ☐ Submit first SOP feedback ticket.
- ☐ Attend cross-team sync to learn collaboration patterns.

Deliverable: New hire is executing real work with confidence, aligned to goals.

Section 5: First 30 Days – Integration

- ☐ Deliver first project/task independently.
- ☐ Document a new SOP or update.
- ☐ Receive peer + manager feedback via async check-in.
- ☐ Participate in culture-building async activity.
- ☐ Review growth plan and upcoming responsibilities.

Deliverable: New hire is fully operational, contributing to SOP system, and integrated into culture.

Section 6: Governance & Continuous Enablement

- ☐ Add new hire to Onboarding Cohort Group for shared Q&A;
- ☐ Quarterly SOP refresh cycle.
- ☐ Quarterly async retro for onboarding improvements.
- ☐ Annual compliance/security SOP recertification.
- ☐ Track onboarding metrics: time-to-productivity, SOP engagement, contribution rate.

Deliverable: System remains current, scalable, and trusted as staff scales beyond 100.

Outcomes:

- Standardization: Every hire follows the same playbook.
- Scalability: Works for 10 or 100+ remote staff.
- Async-first execution: New hires are productive without real-time dependence.
- Culture reinforcement: Values + norms embedded from Day 1.
- Continuous improvement: SOP library evolves with contributions.

Result

An onboarding system that turns new hires into confident, autonomous, and aligned contributors—while scaling seamlessly for remote teams of 100+.

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