



Team Management Checklist

A structured checklist for onboarding, role alignment, communication, accountability, and ongoing support in remote teams.

Team management checklist | remote onboarding checklist | global remote team setup

Borderless Talent Hub

Global remote talent, payroll support, and compliance coordination.

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What this checklist covers

Pre-start planning, role clarity, systems access, manager support, communication routines, and early retention.

Suitable for remote hires, distributed teams, and businesses building structured onboarding across multiple roles.

How to use this checklist

This checklist is intended for hiring managers, operations leads, founders, and team coordinators responsible for bringing remote hires into the business and supporting them through their first months. It can be used before a start date, during the first week, and as a review tool across the first 30 to 90 days.

Tick off each area once it has been completed or confirmed. Where a step is not relevant, mark it as not applicable and note the reason. The value of the checklist is consistency: the more repeatable the process, the easier it becomes to onboard well at scale.

Checklist by category

Pre-start role clarity

Status	Checklist item
<input type="checkbox"/>	Confirm role title, core responsibilities, reporting line, and team structure.
<input type="checkbox"/>	Document the first 30-day priorities and expected early deliverables.
<input type="checkbox"/>	Clarify working hours, time zone overlap, and response expectations.
<input type="checkbox"/>	Confirm key tools, systems, and communication channels the role will use.

Commercial and compliance setup

Status	Checklist item
<input type="checkbox"/>	Complete the agreed employment or contractor documentation.
<input type="checkbox"/>	Confirm payroll timing, onboarding documents, and any mandatory verification steps.
<input type="checkbox"/>	Check whether role-specific compliance, policy, or confidentiality requirements apply.
<input type="checkbox"/>	Ensure the new hire knows who to contact for payroll or documentation queries.



Systems and access

Status	Checklist item
<input type="checkbox"/>	Create email, messaging, project management, and file access before day one.
<input type="checkbox"/>	Test permissions for shared folders, dashboards, and key workflow tools.
<input type="checkbox"/>	Prepare equipment guidance or delivery arrangements where relevant.
<input type="checkbox"/>	Provide a single access summary so the hire is not chasing credentials across messages.

First-week structure

Status	Checklist item
<input type="checkbox"/>	Send a first-week agenda with meetings, introductions, and learning priorities.
<input type="checkbox"/>	Book manager check-ins in advance and leave time for questions.
<input type="checkbox"/>	Introduce key stakeholders and explain how each person fits into the workflow.
<input type="checkbox"/>	Share essential documents only; prioritise the information needed immediately.

Manager handover and support

Status	Checklist item
<input type="checkbox"/>	Explain what success looks like in the role with practical examples.
<input type="checkbox"/>	Review early tasks and quality expectations in detail.
<input type="checkbox"/>	Confirm escalation routes for blockers, approvals, and urgent issues.
<input type="checkbox"/>	Set a regular one-to-one rhythm for feedback and support.

Workflow and communication

Status	Checklist item
<input type="checkbox"/>	Show where tasks are assigned, tracked, and updated.
<input type="checkbox"/>	Explain which channels are used for quick questions, project updates, and formal decisions.
<input type="checkbox"/>	Agree response-time norms that fit the role and time zones involved.



<input type="checkbox"/>	Encourage concise written updates so visibility stays high without excessive meetings.
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Performance and retention

Status	Checklist item
<input type="checkbox"/>	Review progress at the end of week one and again at 30, 60, and 90 days.
<input type="checkbox"/>	Address confusion early rather than waiting for output to drift.
<input type="checkbox"/>	Recognise wins as well as improvement areas to build confidence.
<input type="checkbox"/>	Check whether workload, access, or communication gaps are affecting performance.

Documentation and continuous improvement

Status	Checklist item
<input type="checkbox"/>	Record which onboarding steps were completed and by whom.
<input type="checkbox"/>	Note recurring friction points so the process can be improved for the next hire.
<input type="checkbox"/>	Update onboarding materials when tools, workflows, or policies change.
<input type="checkbox"/>	Keep one current checklist version for all relevant hires and teams.

30-60-90 day review summary

Review point	Expected outcome
Before start date	Role scope confirmed, paperwork complete, access prepared, first-week agenda issued.
Week 1	Introductions complete, manager check-ins live, systems working, priorities understood.
Days 30-60	Output quality reviewed, ownership expanded, communication rhythms settled.
Days 60-90	Performance measured against role expectations, support adjusted, retention risks addressed.



Manager prompts

- Does the new hire know what success looks like this week?
- Can they find the documents, tools, and stakeholders they need without delay?
- Have communication channels and escalation routes been made explicit?
- Is payroll, contract, or compliance information clear and easy to access?
- Are feedback and support happening early enough to prevent performance drift?

Best-practice notes

The strongest checklists are simple enough to be used consistently and detailed enough to prevent missed steps. Keep one core version, then adapt role-specific details only where needed.

Where hiring spans multiple countries or engagement models, align the checklist with the operational steps required for payroll support, compliance coordination, onboarding documents, and manager handover.

A checklist is most useful when it drives action. Review it with the hiring manager before the start date, revisit it at the end of week one, and use it again at 30, 60, and 90 days.

[Related page: borderlesstalenthub.com/onboarding-team-management](https://borderlesstalenthub.com/onboarding-team-management)

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