



# ONBOARDING ESSENTIALS

Keep your new hire  
on the payroll and  
productive from  
day one



Transforming your business  
into a high profit organization.

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# Introduction

Effective onboarding involves much more than welcoming a new employee on their first day and showing them to their desk. A well-thought-out onboarding program begins in the interview process and continues throughout the first year. The initial weeks and months on the job are critical to your new employee's ability to fit in, become a productive member of your team as quickly as possible, and be an ambassador for your company. Be sure to engage employees early to help them acclimate to your culture and their role in the organization. Twenty-two percent of turnover happens within the first 45 days (Bersin) so it is critical to maintain a close relationship with new hires to ensure long-term commitment and success.

*A person who feels appreciated  
will always do more than is expected.*

Your onboarding procedure should be designed not only to convey important information to your new hire but to also make them feel welcome, valued, enthusiastic, and part of the team from day one. In fact, companies with an engaging onboarding program retained 91% of their first-year workers and 58% retained employees for three years or more (The Wynhurst Group). The importance of good onboarding, from both a practical and a morale standpoint, cannot be overstated.

# Onboarding Checklist

EMPLOYEE INFORMATION
Name:
Title:
Office Phone:
Email Address:
Start Date:
Supervisor:
Classification (f/t, p/t, salaried, hourly, etc.):

DURING THE SELECTION PROCESS	
<input type="checkbox"/>	Determine the steps in the selection process, the team members who will be involved in interviews, and the questions to be asked. <b>Use the same process for every applicant.</b>
<input type="checkbox"/>	Use sound interviewing practices (consult our <a href="#">Interview as if your bottom line depends on it</a> booklet for guidance). <i>It is critical that everyone involved in this process understands that although this is your chance to decide if they're right for the job and your company, it is just as much the candidate's opportunity to determine if this is the company/job for them.</i>
<input type="checkbox"/>	Present and review the employment agreement: <ul style="list-style-type: none"><li>- Compensation and Benefits</li><li>- Key roles and Responsibilities</li><li>- Expectations for the first 2 weeks, 6 weeks, 90 days</li></ul>
<input type="checkbox"/>	Provide a copy of the Employee Handbook

## PRIOR TO THE FIRST DAY

<input type="checkbox"/>	Confirm start date, time, place, parking, dress code
<input type="checkbox"/>	Prepare and send documents: <ul style="list-style-type: none"><li>- Signed copy of final employment agreement</li><li>- I-9</li><li>- W-4</li><li>- Benefits enrollment forms</li><li>- Calendar for the first day, first two weeks, and regularly scheduled staff meetings</li></ul>
<input type="checkbox"/>	Remind the new employee to bring any relevant identification (passport, driver's license, etc.)
<input type="checkbox"/>	Add to payroll
<input type="checkbox"/>	Prepare employee workstation (phone, computer, office supplies, business cards, etc.)
<input type="checkbox"/>	Setup access to any tools or spaces they will need (keys, alarm codes, email, documents/files, etc.)
<input type="checkbox"/>	Assign and brief a mentor or "buddy"
<input type="checkbox"/>	Make lunch arrangements with supervisor, mentor and other team members for the first day
<input type="checkbox"/>	Send an announcement to your new employee's team which includes their start day, a description of their role, and a brief bio. Copy the new employee.
<input type="checkbox"/>	Arrange for an assessment review with STM for the employee and their supervisor.

## ON THE FIRST DAY

<input type="checkbox"/>	Welcome them to the team with a small gift – company swag, flowers, a card, or whatever fits your culture
<input type="checkbox"/>	Tour the office and introduce them to people
<input type="checkbox"/>	Review employment forms, benefits, policies, and the job description
<input type="checkbox"/>	Review expectations from the employment agreement
<input type="checkbox"/>	Introduce their mentor or "buddy"
<input type="checkbox"/>	Induct them into the company culture by sharing goals, mission, values, and vision
<input type="checkbox"/>	Take them out to lunch with key team members
<input type="checkbox"/>	Familiarize them with the tools they will be using (phone system, email, shared files, forms, etc.)

## DURING THE FIRST WEEK

<input type="checkbox"/>	Schedule dates for ongoing orientation and training
<input type="checkbox"/>	Familiarize them with key schedules (payday, expense reports due, activity reports due, etc.)
<input type="checkbox"/>	Arrange one-on-one meetings with their supervisor (this should be done weekly for at least the first 90 days, preferably for the first year)
<input type="checkbox"/>	Schedule one-on-one meetings with team members
<input type="checkbox"/>	Expect daily end-of-day 10-minute check-ins with their mentor
<input type="checkbox"/>	Assign first project

## DURING THE FIRST 90 DAYS

<input type="checkbox"/>	Conduct monthly performance reviews
<input type="checkbox"/>	Evaluate the onboarding process
<input type="checkbox"/>	Provide opportunities for social interaction with coworkers
<input type="checkbox"/>	Meet with their mentor to elicit their feedback about your new hire

## BEYOND 90 DAYS

<input type="checkbox"/>	Conduct regular feedback and goal-setting meetings
<input type="checkbox"/>	Send them to relevant events and conferences
<input type="checkbox"/>	Continue the mentor program for the first year
<input type="checkbox"/>	Encourage them to seek out professional development opportunities
<input type="checkbox"/>	Conduct formal mid-year and annual performance reviews
<input type="checkbox"/>	Recognize the employee for successes and achievements

## So, what do we talk about?

As indicated in the checklist, the supervisor should be having weekly one-on-one meetings with your new employee during their first few months (ideally for their first year on the job). These do not have to be lengthy ordeals. In most cases a 15-minute check-in will suffice. This is in addition to checking the status of projects. These meetings are a unique opportunity to get a feel for what's going on in your company from a fresh perspective. Use these questions to get your new employee to talk to you and let you know how they are feeling. More introverted or quiet types will take time to "draw out", but just asking these questions lets them know you care about how they are feeling as much as what they are doing.

- ✓ How long did you feel like "the new guy"?
- ✓ Does it seem to you that the qualifications we asked for are relevant to the job as you now know it?
- ✓ Which co-workers have been most helpful to you?
- ✓ Are there people here who you can count on to brighten a difficult day?
- ✓ Is there anything that has surprised you about the company or the job, good or bad?
- ✓ Have you had any uncomfortable situations or conflicts?
- ✓ Do you feel that you can express new ideas and that they will be heard and appreciated?
- ✓ Is there anyone here whose job is still a mystery to you?
- ✓ Are there pieces of information you wish you'd had earlier in your time here?
- ✓ How do you feel at the end of the day? (Satisfied, energized, accomplished, exhausted, frustrated, etc.)
- ✓ What position would you like to hold in the future?
- ✓ Do you feel you have all of the tools you need to be successful here?
- ✓ If there is one thing you would change about your experience so far what would that be?

As you can see, effective onboarding involves much more than welcoming a new employee on their first day and showing them to their desk. We hope this checklist will help you improve your new employee onboarding process. Now that you've hired the right person, make sure you get them off to a good start and keep them engaged and productive!



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