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Onboarding Process Checklist

Bringing someone new into your organization is not a simple process. You need to get them up to optimal productivity as soon as possible, integrate them into the company culture, make sure they're properly trained in company policy and more.

Organizations with a standard onboarding process experience 54% greater new hire productivity overall. Though it may take a little more time in the first few months, an onboarding process is worth it in the long run.

Follow this simple onboarding checklist to make sure you're not forgetting anything in your new hire's onboarding.

1 - Before the First Day

Because retention is an issue for 55% of companies with less than 1,000 employees, and 65% of organizations with over 1,000 employees, you should ensure you're actively working to retain your employees by starting onboarding as soon as they've accepted your job offer. Successful onboarding programs have been shown to increase retention by 25% and even improve employee performance by up to 11%.

From that point on, you should be preparing to welcome someone new into your office and make the transition as smooth as possible. All of the following are must-dos to get your new hire engaged with the company before they even set foot in the door.

- [ ] **Send a welcome email.** In a personalized greeting, introduce the new employee to the company and provide them with all the information they need for the first day. That should include their start time, parking information, office location, and names and pictures of team members.

    Bonus points: Make a fun video of their future team to welcome them with faces (*and names!*)

- [ ] **Prepare their workspace.** Make sure their desk or office has everything they'll need on the first day: a computer, pens and pencils, headphones or whatever else is necessary for them to do their job.

    Bonus Points: Order their nameplate and business cards, too!

- [ ] **Set them up in your systems.** Ensure the employee has access to your intranet, voicemail and email.

    Bonus Points: Create a binder or Evernote notebook with logins and email addresses, so they have a master list to refer to.

☐ **Send them their paperwork**. Let the new employees to fill out and sign all of the necessary paperwork before they arrive for their first day. These include: Form I-9, E-Verify, Form W-2, 401k enrollment, direct deposit, emergency contact information, and other company-specific tasks such as clothing sizes for uniforms. Why spend hours filling out and signing paperwork when you want to celebrate the employee's first day?

> **Bonus Points:** Do you have a paperless onboarding system? If so, they can fill out these forms from home (where their social security card and checks with routing numbers are), and it makes it easy for you track which forms they have completed. What's more is that you can also assign tasks to hiring managers to help get the new hire set up!

☐ **Get them signed up for benefits**. Does your workplace offer dental? Retirement? Paid vacations or holidays? Send your new hire all the information they need to decide what benefits they want and how to sign up for them. Make their first day about exciting new meetings, not about filling out forms.

> **Bonus Points:** Don't forget to send them the employee handbook!

2 - The First Day

No matter how long you've been in the workforce, the first day at a new job is a little anxiety-inducing. According to recent research, 25% of employees leave their jobs within the first 60 days at a company, and that first day sets the tone. Employee turnover is extremely costly, which is why you want to create a welcoming environment from the moment your new employee steps into your office.

☐ **Introduce them.** Take the employee around the office to meet everyone, especially their team members and direct managers.

> **Bonus Points**: Name tags are very helpful. If you can convince your new hire's team to wear name tags, it will help the new hire remember names and people much easier.

☐ **Set an assignment**. For their first task, give the employee something relatively simple to accomplish.

> **Bonus Points:** No matter what task you give your new hire, offer them a set time in which to complete and check back in with you. This can help them understand how quickly work gets done in your culture.

☐ **Provide a schedule**. You should give your new hire a schedule for their first week, including any required or suggested training.

> **Bonus Points:** Make sure the schedule involves time for things that are fun and social. If it's seminar after seminar, your new hire may start rethinking their decision.

☐ **Let them socialize.** If possible, take the employee out to lunch with their main teammates to bond and integrate into the company culture.

Bonus Points: Giving your new hire a mentor outside of their direct team is a great way for the employee to get to know the culture, too. The mentor acts as a resource, so they can get to know more about the organization as whole. Match them up on day one, and let the mentor take them out for a coffee or snack!

3 - The First Week

The first few days at a new position are absolutely critical. In fact, 33% of employees knew whether they would stay with the company long-term after that first week. To ensure your new hire has a great week, your focus should be on making sure they have what they need, their questions are answered and they're not feeling too overwhelmed or lost. You'll be doing everything you can to help them decide they want to stay.

☐ **Touch base frequently.** Send an email or stop by the employee's desk daily and ask if they're having trouble with anything in particular. Give them help where they need it.

Bonus Points: Ask your new employee how they prefer to communicate. Some might relish email, while others might want to connect via the company intranet to better grasp the hierarchy. Either way, do your best to communicate in that way.

☐ **Explain performance reviews**. Set some time to go over your performance review and goal-setting processes. Make sure they know what's expected of them.

Bonus Points: Does your company have unwritten rules? If it does (hint: they all do), make sure to assign a colleague to explain these to your new hire. No one wants to wear business casual in on a Friday when the rest of the office is in jeans, or speak before the team leader comes in on the Wednesday standup meeting when that's frowned upon, etc.

☐ **Check up on systems.** Ensure employee has fully-functioning computer and phone systems, and they understand how to use them.

Bonus Points: Write down or label important things like their boss' extension or that you must dial "9" before any number.

☐ **Take a survey.** Find out about the new hire's first week experience. What would they improve? What worked well for them?

Bonus Points: Try an "entry interview"! Much like an exit interview, this can gauge the new hire's interview and candidate experience as well as get a bead on whether they feel ready to tackle their new position. Ask if they have the tools and resources they need to do so.

4 - The First Month & Beyond

After the first month, your employee's productivity should be getting higher, and their onboarding will be an important part of that. In fact, 77% of new hires who hit their first performance milestone had formal onboarding training. However, in 2016, 50% of professionals reported it took at least five months for the average employee to reach full productivity. Continue check-ins and goal-setting through these months to ensure the employee reaches full productivity faster and continues to be engaged.

☐ **Give feedback.** Make time for frequent one-on-one meetings to discuss the employee's progress. Invite the employee to give you feedback in return and let you know how to better help them.

   Bonus Points: Ask specific questions. Where do they see themselves in 8 months? How would they change a specific process?

☐ **Explain your systems.** Give the employee a full tour of your performance management and compensation systems.

   Bonus Points: If you handle performance and compensation differently than other companies, explain why and how it aligns with your values.

☐ **Touch base on training.** Ensure the employee is attending and completing any necessary trainings. Ask if there are any trainings your employee thinks would help them be more productive.

   Bonus Points: Offer ongoing learning beyond the first few months. Ask if there are any conferences or webinars they feel would be useful and ask for their notes and synopsis of both!

☐ **Celebrate.** Recognize any achievements or milestones your employee hits. Make sure they're being recognized for good work.

   Bonus Points: Make sure you're recognizing both new hires and your long-standing employees. Recognition, in the eyes of your employees, is always appreciated.

Don't lose another employee to a poor onboarding process. By completing this checklist, you'll be connecting your employee to the organization and the company culture from day one, without forgetting anything important.