

# ONBOARDING CHECKLIST

## Transform a clunky process into a great opportunity

Effective onboarding is more than just a day of orientation and filling out forms. After putting a lot of time and effort into recruiting and hiring new employees, don't blow it now! Get them going faster and keep them longer — and boost HR team efficiency — with a streamlined program that starts with this checklist.



### PREBOARDING

Before their first day, leverage the new hire's excitement:

- Send a welcome message and first-day agenda, including what to bring (a valid ID is a must)
- Have them complete all forms online and review benefits info
- Determine their preferences for technology, equipment, and/or schedule

### DAY ONE

Hold a new-hire orientation:

- Review organization and internal structure
- Provide contact list (HR, IT, etc.)
- Conduct a tour of work areas, break room, etc.
- Have a lunch plan (because nobody likes to eat alone!)
- Assign and issue uniforms or equipment if applicable
- Issue an office or facility access badge
- Give your new hire time to set up their workspace

### WEEK ONE

Help new hires build relationships with other new hires:

- Schedule informal meet-and-greets
- Assign them a buddy or mentor
- Introduce them to senior leaders

Start aligning onboarding to the new hire's role and partner with cross-functional teams to support the process:

- Have new hires:
  - Attend key trainings and/or gain certifications
  - Meet with relevant stakeholders
  - Job shadow teammates
  - Access necessary tools and systems
- Ensure new hire completes HR policy trainings
- Conduct benefit enrollment (if eligible)
- Check in to monitor progress and answer questions

### WITHIN THE FIRST 60 DAYS

Managers and peers are now the new hire's main sources of information. Support them by:

- Encouraging managers to set goals and milestones
- Checking in to monitor progress

### WITHIN THE FIRST 90 DAYS

Prepare managers for new hire's formal 90-day review:

- Ensure the new hire is on track with performance expectations
- Proactively address any outstanding questions or concerns

### WITHIN THE FIRST SIX MONTHS

Maintain cross-functional support:

- Your managers should be providing ongoing coaching and feedback
- Consider a final check-in to get feedback from your new hires about their experience

**Don't blow it!**

**Transform your onboarding program with help from our human capital management (HCM) solution.**