

Onboarding Process Checklist: Best Practices and Ideas to Create an Engaging Experience



Pre-Start

1

The goal of this phase of onboarding is to keep connected with the new hire and keep them engaged. It's also a valuable time to set them up for success on their team and within the company as a whole.



- Send an email officially welcoming them to the team. In the email, highlight their start time and date clearly and share what the tentative agenda will be on day one. Be sure to remind them of what documents they need to bring to ensure a smooth first day. Don't forget to attach the employee handbook for them to read through. For an added bit of fun, ask them for a few fun facts about themselves that you can later share with existing employees.



Name:
Title:
Dept:
Fun fact:

- Send an email to the team introducing new hires. Share their name, title, department, and even a fun fact about them. If there is any sort of welcome event for them, be sure to share that information and ask for them to attend.



- Prepare the employee's desk or office. You'll need to requisition a computer for the employee loaded with programs that they might need as well as any standard software. Set up their accounts, email, business cards, access cards/keys, etc.



- Have the employee's manager set up a team lunch for the first day to welcome the new person to the team. Reach out beforehand if you have it ordered in or ask where they would like to go.



First Day

2

This is an exciting day for new employees, and they are likely feeling a few mixed emotions from excitement to nervousness. This is your chance to ease those nerves and leave a lasting good impression.



- Have a swag bag waiting for each employee on day one. This can include t-shirts, mugs, pens, candy, etc. It's little touches like these that make employees feel welcome.



- Collect necessary paperwork first thing. This will clear the administrative part out of the way for the fun things happening later in the day. This is when you can also discuss the employee handbook more in depth, talk about safety and security, and go over your code of conduct.

- Give an office tour. Show them around and introduce them to team members along the way. Show them where the supply closet, bathrooms, and break areas are.

- Help employees set up their workstations. Retrieve any other supplies they might need. Assist them in setting up their email, voicemail, signature, etc. If needed, give them an access card, code, or key.



- Make sure managers followed through and that the employee has lunch plans. If not, find someone from their team to treat them to lunch.

- Review the schedule for the week, pointing out what time to come in every day, when to expect to leave, and any important meetings.



- Before they leave for the day, have them meet with their manager for a check-in. They can discuss job duties, the day's events, what to expect the next day, or ask any other questions.



First Week

3

New hires will need support during this time as they are trying to navigate these new waters. Make sure they cover the basics of their new role and really dive deep into your company culture.



- Schedule meetings with different teams on different days. This allows for the new hire to get to know the company and its many moving pieces. They also get to meet others they may or may not work with or otherwise encounter.

- Schedule any software training that is needed to complete their job. Show them your intranet, helpdesk, and any other useful things they might need.



- Set up group meetings with C-suite leaders. This will help new hires feel connected immediately and show that upper management is indeed accessible.

- Discuss the probationary period. Share what the expectations will be during that time and what possible outcomes are.



- Send them on a scavenger hunt that has them search out other employees' fun facts. This will get them up and moving around the office, introduce them to new people, and help break the ice.

- On the last day of the week, present the new employees to the whole company or department. This allows your veteran employees to know who is joining and they can seek them out to say hello in the coming weeks.



First Month

4

The first month is crucial for relationship building and development.



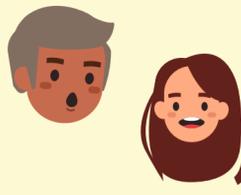
- Conduct an onboarding survey to gauge new employees' experience. Ask insightful questions about what they found helpful and what they thought could be tweaked.

- Have managers provide feedback on performance so far.

- Schedule any additional trainings employees feel they may need.



- If there wasn't time in the first week, have the new hire meet with or shadow each person on the team. This will help them build relationships and develop an understanding of what each person's role is.



- Assign each employee a mentor. This person can be an invaluable resource for a new hire. They can provide help and answer questions that arise throughout their time at the company.



3-6 Months

5

During these months, employees are diving deeper into their roles and the company culture.



- Depending on your probationary period, keep in close contact with new hires. It can take months for them to truly be acclimated to their new role.

- Ensure new employees are still checking in with their managers and mentors on a regular basis. This is an important aspect of their continual growth and success as an employee in your organization.

To take a deeper dive into establishing an onboarding program, check out these additional resources.



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