

## Onboarding Checklist

### Instructions for Recruiting:

This onboarding checklist contains activities that are essential to increasing new hire performance and engagement. Alter the checklist to reflect onboarding activities for hires at your organization, and assign owners (e.g., Recruiting, hiring manager, or HR generalist) for each activity. Once you have customized the checklist appropriately, provide it to hiring managers to inform them of the process and keep them accountable for completing necessary onboarding activities. Delete this text before presenting to hiring managers.

### Instructions for Hiring Managers:

There are many logistical and strategic components to onboard new hires into the team and organization effectively. Yet, this critical stage often fails to receive the attention it warrants due to divided or unclear responsibilities and a lack of defined tasks and activities. Use this checklist to ensure that you or your team has taken action to onboard each new hire effectively.

| New Hire Name and Position | Hire Date | Hiring Manager Name | Recruiter Name |
|----------------------------|-----------|---------------------|----------------|
|                            |           |                     |                |

| Pre-Start  |  |       |                 |
|--|--|-------|-----------------|
| Task   | Additional Information   | Owner | Completion Date |
| 1. Send a welcome kit to the new hire  | The welcome kit should include the following: <ul style="list-style-type: none"> <li>• Logistical information for their start date</li> <li>• Required forms</li> <li>• Information about the organization's vision and strategy</li> <li>• Candidate experience survey</li> <li>• Examples of work the new hire will be doing and/or information about upcoming projects</li> <li>• Information unique to the new hire's location (e.g., parking, lunch spots, day care)</li> </ul> |       |                 |
| 2. Maintain communications with the new hire   | Reiterate information sent via the welcome kit and address new hire concerns through phone calls and e-mails.  |       |                 |
| 3. Enroll new hire in centralized onboarding courses                                   | Centralized onboarding courses introduce the new hire to organizational culture and processes.   |       |                 |
| 4. Prepare workspace and make sure all necessary resources are present and functioning | This activity may include providing the new hire with a workstation, computer or other equipment, office supplies, username and password, business cards, planners for recurring meetings, and access to all resources necessary to the job.   |       |                 |
| 5. Communicate to the rest of the team the start date of the new hire                  | Encourage the new hire's teammates to welcome the new hire to the organization and be available for questions once the new hire arrives.   |       |                 |

| First Week  |   |       |                 |
|---|---|-------|-----------------|
| Task  | Additional Information  | Owner | Completion Date |
| 1. Celebrate the new hire's arrival   | Show the new hire that he/she is appreciated by scheduling a lunch or social event in their honor.  |       |                 |
| 2. Have the new hire complete necessary work documents                                    | The new hire should complete government forms (e.g., the W-2 in the United States), and enroll in benefits.   |       |                 |
| 3. Respond to new hire concerns   | Schedule a time to meet with the new hire on a weekly basis to review and address concerns. Hold some meetings in the cafeteria, at a nearby coffee shop, or other informal atmosphere to make the new hire feel more comfortable.  |       |                 |
| 4. Introduce the new hire to members of his/her immediate team                            | Have the new hire set up one-on-one conversations with team members throughout the first few weeks.   |       |                 |
| 5. Give the new hire a tour of the facilities   | This tour should include where the new hire can find supplies, copymachines, coffee, restrooms, the cafeteria, and exits.   |       |                 |
| 6. Review onboarding objectives and timelines with the new hire                           | Ensure the new hire is prepared for the onboarding schedule for the first few months, and address questions the new hire may have.  |       |                 |
| 7. Review processes, contacts, and sources of information necessary to the new hire's job | This conversation should include introducing basic workflows; reviewing the names, titles, and basic background of immediate team members; and introducing the new hire to online and offline places to find answers regarding their job.   |       |                 |
| 8. Get to know the new hire's preferences   | Arrange a meeting to hear about the new hire's work style, communication preferences, areas of strengths and weaknesses, and career objectives.   |       |                 |
| 9. Provide the new hire with a clear explanation of their first assignment                | The new hire should have simple assignments to complete starting during the first week. Arrange a meeting to go over steps to complete the first assignment.  |       |                 |
| 10. Review performance objectives   | Provide the new hire with an overview document of the performance review process. Walk through a sample performance review form that includes performance criteria, how criteria are measured, how information will be presented to the new hire, and discussion points during the formal review. |       |                 |

| First Month  |   |       |                 |
|--|---|-------|-----------------|
| Task   | Additional Information  | Owner | Completion Date |
| 1. Explain to the new hire how their job responsibilities relate to organizational goals             | Once the new hire has developed an understanding of their job responsibilities and organizational structure, speak with the new hire regarding the impact that they have, however indirectly, on organizational outcomes. This can be done by using an example or starting from the customer's point of view. |       |                 |
| 2. Assign a mentor/buddy to assist the new hire in acclimating to the organization                   | Buddies should be employees who are knowledgeable of the organization and high-performing. Provide buddies with a list of possible activities to undertake or questions to answer with the new hire.  |       |                 |
| 3. Create a networking plan between the new hire and appropriate individuals across the organization | The networking plan should include senior executives, peers of the new hire, and other new hires within the organization.   |       |                 |

| First Three Months                              |  |       |                 |
|---|--|-------|-----------------|
| Task  | Additional Information   | Owner | Completion Date |
| 1. Provide an early informal performance review | The informal review should be a scheduled, structured conversation between the new hire and their manager regarding their performance to date. The informal review should take place after the manager has had time to gauge performance strengths and weaknesses of the new hire, but early enough for the new hire to change behaviors before the formal review process begins. During the conversation, the manager should discuss actionable items to improve performance, while making clear that the review will not become part of the new hire's record. This activity should conclude with creation of an individual development plan for the new hire. |       |                 |