

49 THINGS THAT SHOULD BE ON YOUR ONBOARDING LIST BUT PROBABLY AREN'T

Most HR professionals equate onboarding to orientation, but there's much more to it. Onboarding an employee has to do with bringing them into your organizational culture so that they live your core values and strive to achieve your mission. This means giving them a proper welcome, offering them resources and mentors, and making sure that they align with your organization. While it may seem overwhelming, you are not in this alone! EVERYONE should be involved in the onboarding process, not just HR. So the next time you are preparing to onboard a new hire, try adding some of the following items to your checklist.



BEFORE THE FIRST DAY

Most organizations don't begin onboarding until the new hire arrives in their office on the first day. Take initiative and prepare for the new hire's first day on the job. They should not walk in and be confused about what to do, where to go, or who to talk to.

Assigned to HR

- 01** Contact new hire via telephone to welcome them!

- 02** Select a mentor or onboarding buddy and ask them to write up a little about themselves, and provide a picture (include in welcome packet)
- 03** Send the new hire packet including a welcome letter from the CEO, an agenda for the first few weeks, a map of the area with restaurants, positive testimonials from current employees, a welcome letter from their mentor/buddy, and a link to the YouTube intro video from the team.
- 04** Create a welcome binder that includes logistics of the job and work environment such as a current job description and safety procedures for the building. You can also put a virtual spin on it!
- 05** Send out an email announcing new hire - use information gathered during welcome call
- 06** Prepare a fun activity for the new hire and staff.

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Assigned to Manager

- 07 Assist HR in preparing for the new hire's first day
- 08 Give HR information about yourself to give to the new hire before his/her first day
- 09 Discuss with team your expectations for training new hire, share calendar/agenda and ensure all have their training time scheduled and in their calendars

Assigned to Team

- 10 Assist HR in preparing for a fun activity for the new hire's first day (the more people involved, the better it will be!)
- 11 Put together a welcome basket of "survival tools" (e.g., \$5 coffee shop gift card for mid-day, earbuds for music when the floor gets too loud, pen for all those notes to take)
- 12 As a team, create a welcome video for the new hire and send link to HR

FIRST DAY CHECKLIST

It is important that you make a good first impression on your new hires. Try to really focus on them during their first day. Clear your schedule and make sure managers have time to sit down with new hires and discuss the logistics of the position. They want to know what is expected of them!

Assigned to HR

- 13 Stand at front door to greet new hire as they arrive OR if virtual schedule a video call first thing.
- 14 Clear your schedule to be sure you are ready to welcome the new hire.
 - 14a Take the time to give them their welcome binder, a tour of the office, and introduce them to their team and mentor/buddy,
 - 14b Discuss the organization's vision, mission, and core values and how they are lived
- 15 Implement any first day activities for interactive onboarding
- 16 Implement any first day activities for interactive onboarding
- 17 Go out to lunch with new hire, manager, and mentor/buddy

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Assigned to Manager

- 18** Stand at front door to greet new hire as they arrive OR if virtual schedule a video call first thing.
- 19** Meet with the new hire to go over their job descriptions and responsibilities
 - 19a** Discuss history of organization and how their job fits into the department, company culture, history, and ultimately helps the organization meet its vision and mission
 - 19b** Convey the employee's importance to the organization
- 20** Go out to lunch with new hire, HR, and mentor/buddy
- 21** Participate in the onboarding activities with new hire and team

Assigned to Team

- 22** Make sure to be available for an introduction with the new hire
- 23** Assist HR in executing the fun activity for the new hire's first day (the more people involved, the better it will be!)



FIRST WEEK CHECKLIST

At the end of the first week, your new hire will probably be thinking, "do I see myself staying here for a while," or, "am I going to enjoy working here?" That is why onboarding should not stop with first day orientation, it should continue for weeks and months after hiring the new employee.

Assigned to HR

- 24** Coordinate an introduction between the new hire and the department head, and new hire and CEO, if not done already
- 25** Make sure to check in with the new hire on a daily basis to answer any questions or to resolve any issues
- 26** Include another fun onboarding activity at the end of the week

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Assigned to Manager

- 27 Make sure to check in with them daily to answer any questions or to resolve any issues
- 28 Further convey the importance of the employee to the department and to the organization through core values, vision and mission
- 29 Ensure buddy/mentor is providing useful information and is available to the new hire

Assigned to Team

- 30 If you haven't already, introduce yourself to the new hire!
- 31 Make time to take the new hire to lunch (this can be done as a group)
- 32 Check in with the new hire and see if they need any specific help with their training

FIRST MONTH CHECKLIST

At this point, the new hire has most likely completed the majority of their training and understands both the spoken and unspoken culture of your organization. Most of the time this is where managers and HR begin to lose touch with the new hire, but they must keep going! Employees want feedback, they want to know how they are doing so far, if their coworkers like them, and what they can be doing to improve. So it's important to keep checking in!

Assigned to HR

- 33 Schedule time in your calendar to check in with the new hire every week
- 34 Continue introducing the new hire to their team and key stakeholders in the organization (you can do this in creative ways)
- 35 Check in with the new hire's mentor/onboarding body
- 36 Schedule time with various departments, even if new hire won't actually work with them, so new hire has idea of what each department does and where they fit into the big picture

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Assigned to Manager

- 37 Schedule time in your calendar to give continuous and meaningful feedback, and follow through
- 38 Discuss the new hire's long term goals
- 39 Ensure buddy/mentor is providing useful information and is available to the new hire



Assigned to Team

- 40 Invite the new hire to an event outside of work (i.e., a BBQ, happy hour, etc.)
- 41 Check in with the new hire and answer any questions they have about training
- 42 Prepare stories about your training experiences that will help the new hire

THREE MONTH CHECKLIST

Most of the time by the end of the first three months, new employees are somewhat left to their own devices. Other than a formal performance review, HR and management have most likely returned to their day to day activities. Make sure to keep an eye out for your newbies! These first three months are crucial in determining if your new hire is a good fit for your organization.

Assigned to HR

- 43 Take the new hire out to lunch again to see how they are doing
- 44 Execute another onboarding activity
- 45 Ultimately, make sure your new hire is integrating well into your company culture (If not, explore this further as it is important everyone fit within your culture.)

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Assigned to Manager

- 46 Provide more information about learning and growth opportunities
- 47 Ensure buddy/mentor is providing useful information and is available to the new hire

Assigned to Team

- 48 If there are any conferences or work events they need to attend, try and group up with the new hire. This way they don't feel out of place.
- 49 Invite the new hire to an event outside of work to continue assisting in socialization

REMEMBER

Onboarding should be a celebration! While it seems like a lot of work to properly onboard new hires, ultimately, you will have less turnover, shorter time to productivity, and engaged employees who truly care about your organization. It's worth it!

In fact, studies show that over 60% of new hires are more likely to stay at an organization for longer than three years if they are properly onboarded. So get everyone involved in the process and make your new hires feel welcome!

Throw them a party, discuss their future with the organization, be there to greet them on their first day, whatever you choose, know that the investment will pay off. In the end, onboarding is much more than training and paperwork, and if you do it right, not only will you see financial returns but you may just gain some employees for life.

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