



Complete Onboarding Checklist



Make the most of a new hire's first year with these helpful tips and milestones.

Onboarding is smooth sailing with everyone working together.

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01

Introduction

Engage new hires to maximize success

As you dive into this checklist, let's make sure we're clear from the start.

Onboarding doesn't rest solely on the shoulders of HR. For real success, we have to make sure many departments and roles are involved in the process. After all, it takes a crew to sail a ship!

To really engage new hires and maximize their commitment and engagement, we'll want to cultivate the new relationships they'll need to be successful.

We've broken out the checklist and guide on a timeline, but nothing is set in stone, feel free to move it around as best suits your organization.

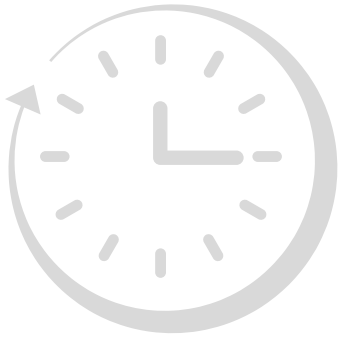
There are also two levels to help you set initial priorities. If you are just getting started with structured onboarding, it can seem like a lot, so start where you are and add to it over time!

At the core of this strategy is creating meaningful feedback loops and engagement from your new hires.

Let's set sail for better onboarding now!

02

Roadmap



Key time periods:

Start:

Evaluate your existing onboarding process. It might be helpful to compare what you do now with the checklist and identify where you can have the most impact.

Before the first day:

Preboarding. Keep your new hires engaged and excited. Lay the groundwork to make their first day amazing.

Day 1:

People, not paper. Reaffirm why they joined your crew.

Week 1:

Help them integrate even more into your crew. Provide informal get-to-know-you time.

Month 1:

The first month should be all about learning the tips, tricks and skills they will need for long term success.

Month 3:

Make sure the bigger learning goals are being covered.

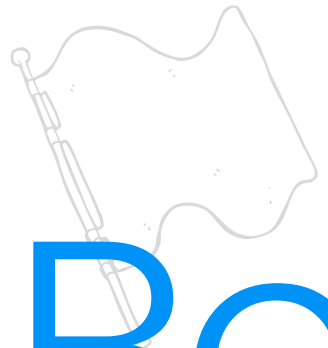
Month 6:

Gather the perspective and insights from your new employee.

03

Before the

first day



Before the first day:

Your opportunity starts here!
Pre-boarding? No, PRO-Boarding.

The goal? Calm the anxiety and keep them engaged and excited! Also make sure to manage expectations, so they don't get shipwrecked on their first day.

What's better than getting answers and reassurances without ever having to ask?
Not much.



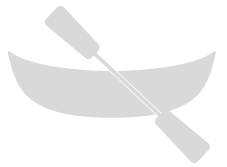
Captain's Tip

Onboarding vs Orientation

Let's clear the air real quick, they're not the same thing, Cap!
Orientation is all about the nitty-gritty, filling out paperwork, taking a tour of the office, sitting through endless powerpoint presentations.

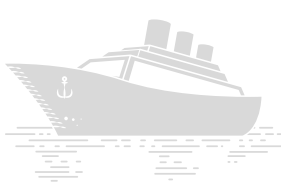
Onboarding is a lengthier, more holistic process that helps new hires understand their role and contribution to the organization, set goals, and ensures a healthy integration with the organization itself.

Before the first day: Checklist



Paddleboat level

- Schedule for the first day
- Directions to the office and parking arrangements
- Send contracts and paperwork
- Payroll process and documentation explained.
- Non-disclosure, Visas, eligibility to work confirmed and signed.
- Company Dress code explained
- Employee handbook sent.
- Email and IT access requested and ready
- Credential Provisioning
- Desk Setup



Yacht Level

- Have the team send a 'welcome' message to the new hire
- Share the history of the company, how it was founded- what the future goals are
- Share the mission vision values
- Introduce the new hire to the mentor
- Schedule a casual lunch with the new hire's team
- Schedule and share meetings with key stakeholders - managers, supervisors etc
- Share some insider tips for navigating the office on the first day.

04

Day 1



Day 1

Reaffirm why they joined the crew.

Help them feel they made the right decision stepping aboard, and welcome them into the crew - set the tone that lets them know they made the right decision.

The first day should be all about meeting the right people and helping them get settled in.

It's important to have a few casual moments as well, and not just inundate your new hire with information. It's an overwhelming day, so focus on making them feel comfortable.



Captain's Tip

You'll want to make sure you are providing the answers to these key questions - From Alida Miranda Wolf

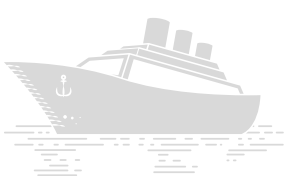
1. What am I here to do?
2. What do I have at my disposal to do it?
3. What do I need to know to succeed?
4. Who are my key stakeholders?
5. How am I being measured?
6. What behaviours are rewarded in this culture?
7. What behaviours are looked down upon in this culture?

Day 1: Checklist



Paddleboat level

- Make sure the whole department/team or company (as appropriate) know a new employee is coming in today!
- Have an assigned buddy ready for the day to show your new hire around and help them feel comfortable.
- Provide all the credential information you collected and prepared in the "Before Day one Section"
- Have a welcome note or sign and a couple of special items available at their desk when they arrive.
- Confirm that the pre-booked meetings are all ready to go.
- Provide a company directory and map or sorts to help them navigate and find whoever they need



Yacht Level

- Try to avoid paperwork today. If you really nailed it, this was all complete in the pre-boarding stage. This day is overwhelming enough!
- Have a special welcome gift for the new hire.
- Show the new hire what their first project will be and make sure the orientation activities are aligned with helping them complete the project

05

Week 1



Week 1

The information overload should be tapering off a little by now and they should be getting their sea-legs ready.

The end of the first week is the perfect time to help them integrate even more into your crew.

Make an effort to provide informal get-to-know-you time.

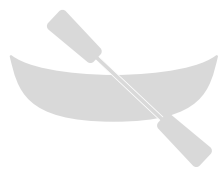
There may be opportunities as well in the first couple of weeks to think outside the departmental box and provide the new hire with some shadowing opportunities.



Captain's Tip

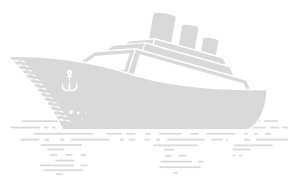
Scheduling some time in the first week to help the new employee dig into the strategy of the organization, and educating them on the business itself - helps them understand how their role contributes to the bigger picture.

Week 1: Checklist



Paddleboat level

- Now is the time to be certain that all equipment has been provided and paperwork is completed. Make sure any questions have been answered related to the forms they filled out and signed.
- Have the manager check-in with the new hire and be certain they have everything they need.
- Don't forget to ask how they felt about the first week!
- have a conversation with the new hire to set their objectives and goals for the next month. Bonus points for making it a collaborative, two way conversation!



Yacht Level

- Up your employer brand and let the new hire contribute to social media campaigns, sharing positive first week experiences.
- Ensure the new-hire's buddy and mentor are setting aside some check-in time together
- Provide some shadow time to the new hire so they can see how other roles in the organization are contributing.

06

Month 1



Month 1

Peek inside the engine room.

Your new hire is starting to settle in and is feeling a little more comfortable. The new hire should have some first project on the go, and know what their objectives are for this month already. Make sure they understand what the business objectives are and how they can contribute.

The first month should be all about learning the tips, tricks, and skills they will need for long-term success.

Throughout the first month it is also helpful to make sure that more seasoned employees are setting aside time to spend with new employee to help show them the ropes and build better connections.



Captain's Tip

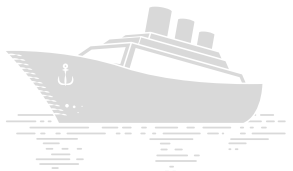
Where possible, making some time for job shadowing outside of the new hires department or role can really help provide insight into how things work in the organization. Often times, it helps the new hire better understand how they can best contribute to the whole organization.

Month 1: Checklist



Paddleboat level

- Have an informal review of performance and expectations with the new employee. Take the opportunity to re-align expectations and make sure everything is on track.
- Make sure they receive their first pay cheque on time!
- Have the employee share their review or understanding of the company and crew. It's a great way to ensure that your goals and understanding are on track.
- Touch base on any required training needs or any additional training they may need.

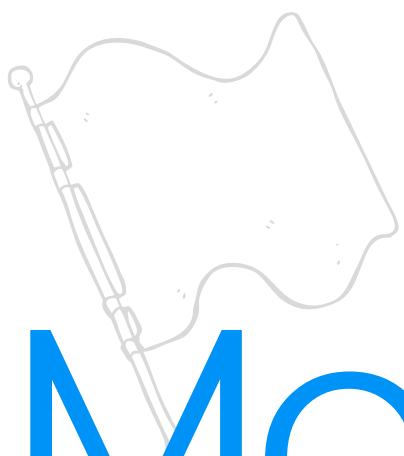


Yacht Level

- Set aside time to celebrate and recognize any achievements or milestones the employee hits. Recognition for their good work will help reassure them they are on the right track.
- Provide regular opportunities for the employee to share feedback. Little pulse checks at regular intervals will help you stay on top of any hiccups that may arise.
- Encourage people to talk with new the new employee. Building connections is critical in the first month and it's always better when established employees reach out to newer people.

07

Month 3



Month 3

Building and doing.

Your new employee should be settled into their new team and role, with the key fast-learning phase complete. There is still lots of onboarding opportunity though.

Now is the time to make sure the bigger learning goals are being covered. Instill even more confidence in their progression with your organization.

Where in the first couple of months it might have been best to keep check-ins feeling informal and helpful, now is the time to make certain that you are setting aside more in-depth time. Really dig in to goal setting and meaningful feedback (for both parties!)

Whenever possible, try to collect feedback from as many sources as possible about the new hire. Covering different perspectives and scenarios is the the best way to ensure that you are able to make a real impact for the employee.

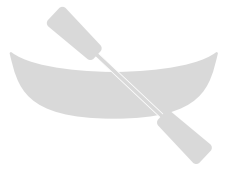


Captain's Tip

Remember the impact of keeping up the efforts over the next few months:

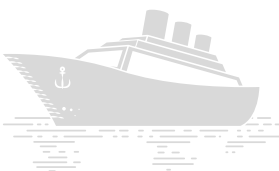
- **Employees who rated their onboarding experience as 'highly effective' were 18 times more likely to feel highly committed to their organization**
- **91 percent of employees who went through effective onboarding felt strong connectedness at work**
- **89 percent of employees who went through effective onboarding felt strongly integrated into their company culture.**

Month 3: Checklist



Paddleboat level

- An in-depth review of the first milestones, improvements and achievements. Take some time in the first three months to make sure everyone is on the same page, provide the opportunity to celebrate achievements and coach weakness.
 - Identify at least three accomplishments for praise.
- Employee and manager goal setting - set some 1:1 time to look at project ownership and development objectives.

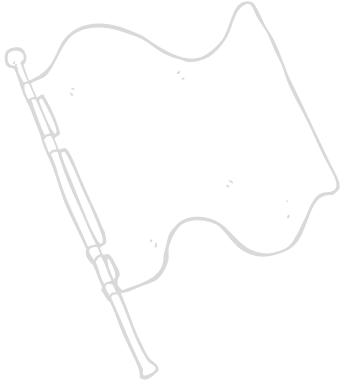


Yacht Level

- Grab some feedback from all stakeholders and review overall progress. It's a great time to evaluate how the onboarding process is performing for your team as well.
- Be proactive - make sure the new employee is being provided invitations to extra-curricular activities like volunteer initiative, committees, or casual lunches.

08

Month 6



Month 6

Compass alignment.

Your not-so-new employee might even be mentoring new hires by now. They should be well settled in and have a clear idea of where they are headed and how they are contributing. With their fresh perspective, they may have some really valuable insight and perspective on the culture and processes, so don't forget to capture that.

If you aren't regularly seeking to capture the new hire's feedback in the first six months, you are missing out on some significant opportunities for your organization to improve.

It's not all about evaluating the employee's performance, but taking the time to look for areas of improvement in the organization.



Captain's Tip

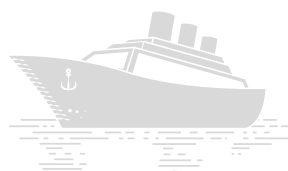
If employees are learning and growing in your organization, you'll be less likely to lose upwards of 60% of your entire workforce within the first 4 years. Make sure the learning and development plan is still on track and moving forward.

Month 6: Checklist



Paddleboat level

- Time for another review of milestones and objectives. Take time to identify optimizations and improvements that will further set them up for success.
- By now, it's important that they've had some interaction or introduction to senior management, no matter their position. Humanize the team and put a face to the actions.
- Even a small celebration of hitting the six month mark is a worthwhile endeavour. A congratulatory note will help you stand out.



Yacht Level

- Complete a scorecard if you don't have one already and complete an assessment of performance over the last 6 months. Have the employee complete a self assessment. This is where you'll get the information needed to recalibrate your milestones and processes going forward to get the most from your efforts.
- Have the employee share their one-year goals and work together on a plan to achieve them.
- If they are doing amazing work, and your company is growing, you might want to discuss possible promotions. Link their goals and possible promotions together so it keeps them motivated and on track.

09

Conclusion



Summary

As you can see, there are lots of opportunities to have a real impact with your onboarding efforts, and the seas are smoother with the whole team aboard.

While it might seem an overwhelming list of tasks at first, there is a lot that can easily be automated. leaning on technology can easily lift the burden for you. In fact, with tools like AllOnboard offers, you can set it up once, and rest assured that everyone will be reminded and prompted to make those onboarding lifts you need.



Final Captain's Tip

Have you heard of the 70:20:10 leadership development model?

It suggest learning comes from 70% challenging projects, 20% coaching and mentorship, and 10% structured learning.

Before the new employee begins, why not take a peek through your resources and see how you can complement developing your talent.