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New Hire Onboarding Checklist for HR

Onboarding new employees at your organization is one of the most critical parts of the employee journey. It's your chance to properly train new hires in company policy, integrate them into the company culture, and help them reach optimal productivity as soon as possible. But only 12% of employees think their company does onboarding well, and retaining new hires is a challenge — up to 20% of costly employee turnover happens within the first 45 days in their role.

Though it may take a little more time in the first few months, an onboarding process is worth it. Research shows that organizations with a standard onboarding process can increase retention by 50% and even experience 62% greater new hire productivity. An excellent onboarding plan also increases employee engagement long-term.

Follow this new hire onboarding checklist for an engaging, comprehensive onboarding plan that leaves your employees confident and prepared to take on their new roles.

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Onboarding Part 1: Before the First Day

Do your efforts to retain new hires start before their first day? Unfortunately, 20% of employees quit before they even begin. Start their employee experience off right and increase the odds of them staying with your organization by beginning the onboarding process before day one with pre-boarding.

☐ **Send a welcome email.** Send a personalized email from the HR team welcoming your new hire to the company and providing them with all the information they need for the first day. Hiring managers should also send a welcome email and tell new hires what to expect on their first day, especially if employees are remote.

☐ **Set up their workspace or send equipment.** Ensure new employees have everything they'll need for their first day: a laptop and accessories, a desk or workspace, and whatever else is necessary to do their job. If your new hire will work remotely, send all accessories, screens, and equipment to their house before their start date.

☐ **Set them up in your systems.** Ensure the employee has access to your intranet, voicemail, and email. Make instructional videos if necessary, and set up a password management system to ensure security.

☐ **Send new hires their paperwork digitally.** A paperless onboarding system makes it easy for your new employees to fill out and sign all the necessary paperwork before arriving on their first day. These include I-9 compliance, E-Verify, W2 forms, benefits and 401 (k) enrollment, direct deposit paperwork, and emergency contact information. Why spend hours filling out and signing paperwork when you could be celebrating the employee's first day?

☐ **Plan important introductions.** Schedule meetings with any managers, team members, and colleagues from other departments the new hire will interact with regularly. Set these up before the new hire's start date so they meet their closest coworkers ASAP.

> ***Bonus:*** *Make a fun video from their new team to welcome them with faces and names!*

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Onboarding Part 2: The First Day

No matter how long you've been in the workforce, the first day at a new job is a little anxiety-inducing, especially if you don't know what to expect. Help beat first-day jitters by planning out the first day so new hires aren't overwhelmed and have a chance to get to know their new team.

- [ ] **Make an announcement.** HR or hiring managers should send out a welcome message and a short introduction for new hires via email or Slack, whether you're in-office or remote. Then, invite employees to say hi to their new colleagues via Slack or Zoom or stop by their desks at the office.

- [ ] **Provide an onboarding schedule.** You should give your new hire a schedule for their first week, including any required or suggested training. You can also discuss the rest of their onboarding program but don't overwhelm them with too much information.

- [ ] **Assign a mentor.** Pair new hires with a senior team member to mentor them and schedule regular check-ins. This one works: 91% of employees who participate in a mentorship program are satisfied with their jobs.

- [ ] **Take a moment to relax.** If possible, take the employee to lunch with their main teammates to bond and integrate into the company culture. Remote teams might consider a team lunch or happy hour over Zoom.

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Onboarding Part 3: The First Week

The first few days at a new position are difficult — there's not much that employees can start working on, and they're often still working their way through orientation and training courses.

To ensure your new hire has a great week, you should focus on ensuring they have what they need, their questions are answered, and they're not feeling too overwhelmed or lost. The first week is also great for more team introductions and a deeper dive into company history, culture, and more.

- [ ] **Set the new hire up with any training materials.** Get started on training modules or classes during week one and communicate any deadlines for completing training.

- [ ] **Walk them through policies and procedures.** Cover policies and procedures to help your new employee feel comfortable getting started on the real work. Go over the rules and processes for internet usage, email communication, breaks, etc., and start familiarizing them with the technology they will use daily.

- [ ] **Dig into the company's mission, vision, and values.** Help employees understand the history of the company, as well as its mission, vision, and values and how their work plays a part in the organization's success.

- [ ] **Check in with new hires.** Set up a time to check in, ensure they have everything they need, including equipment and system access, and answer any questions.

- [ ] **Give an assignment.** Let new hires hit the ground running with a simple task or project they can complete in a few hours or a day. Make it a joint effort with their new teammates to introduce your collaborative work environment and start building relationships.

- [ ] **Explain performance reviews.** Set some time to go over your performance review and goal-setting processes. Make sure they know what's expected of them.

> **Bonus:** *No matter what task you give your new hire, offer them a set time to complete and check back in with you. This can help them understand how projects and feedback are handled at your organization.*

Onboarding Part 4: The First Month & Beyond

Gallup estimates that it takes some employees around 12 months to reach full productivity. While that doesn't mean your onboarding program needs to last an entire year, onboarding that lasts at least 90 days is recommended. Continue check-ins and goal-setting through these months to ensure the employee reaches total productivity as planned and stays engaged throughout the process.

- [ ] **Set performance goals.** Keeping your new employee engaged with goals will point them in the right direction and give them something to work towards from the start. Set a few SMART goals for new hires to accomplish within their first 90 days.

- [ ] **Establish open communication.** As onboarding progresses, open up some dialogue to gauge how the experience is going for new hires. Find out what is going well and what could be better, and encourage them to ask questions.

- [ ] **Encourage independence.** With training, introductions, and communication all covered, it's time to start letting your new employees practice what you hired them for. Since they are still relatively new, you'll want to continue checking their work and providing feedback, but use this time to increase their projects and tasks with supervision.

- [ ] **Give constructive feedback and recognition.** Make time for frequent one-on-one meetings to discuss the employee's progress. Get updates from those who work closely with the new hire to learn more about onboarding progress and give constructive feedback. Give positive feedback using employee recognition to kickstart engagement.

- [ ] **Build a career path.** Once your employee knows more about their role and your company, work with them to develop a career plan that fits their personal goals. Designate career goals to help new hires visualize their path at your company.

- [ ] **Send an onboarding survey.** Find out about the new hire's first-week experience with an employee survey. What would they improve? What worked well for them?

- [ ] **Give new hires their first performance review.** After 90 days, the new hire should feel comfortable in their role. The first review is the best time to evaluate their strengths and weaknesses and determine if they're on track for success.

> *Bonus: Try an "entry interview." Much like an exit interview, this can gauge the new hire's interview and candidate experience and determine whether they feel ready to tackle their new position. In addition, ask if they have the tools and resources they need to do so.*

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Don't lose another employee to a negative onboarding experience. By completing this checklist, you'll connect your employee to the organization and the company culture from day one.