GenesisHR
SOLUTIONS

A Checklist For Onboarding Your New Employees

INTRODUCTION

Did you know your onboarding process can have a direct impact on your company's bottom line? [Research from employee recognition company O.C. Tanner](#) found that up to 20% of employee turnover occurs within the first 45 days of employment. With hiring costs averaging five digits, a problematic onboarding process—or the lack of a defined process at all—that causes new employees to leave their companies early on is a mistake most small businesses can't afford to make.

By using your onboarding program to introduce new hires to your culture and show how they can positively contribute in their role, you can ensure they have everything they need for long-term success at your company.

So the question is, **what should your onboarding program include?** This checklist includes everything small business owners, supervisors, and HR managers need to know and do at three crucial periods in the onboarding process to ensure that new hires are successful.

PHASE 1: PRE-BOARDING

> **Timeline:** From the time a new hire accepts your job offer to the day before they start the new job.
>
> **Goal:** Alleviate first-day jitters and complete as much paperwork as possible before onboarding.

☐ **Provide a specific offer letter.**

Your offer letter should provide all pertinent information about the job, in detail, to the potential new employee. It should include the following:

- ☐ Job title
- ☐ Who the position reports to
- ☐ How much the prospective employee will be paid
- ☐ Benefits available
- ☐ Start date
- ☐ Expected arrival date, time, and who they should meet on the first day

☐ **Provide an outline of their first day.**

Make sure the new employee has a detailed schedule for their first day. Be sure to include who meetings are with, where and when they will take place, and what the employee should know or do beforehand. Also, let the employee know if you will be handling their lunch or other meal arrangements on that first day.

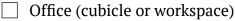☐ **Give them the requisite paperwork to complete in advance.**

Instead of waiting until they show up at the office, save time for both of you and share paperwork and benefits election forms ahead of time (if possible). If all the paperwork can't be completed in advance, make sure you've prepared your new hire for what they need to bring. This includes the following:
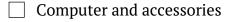
☐ Tax form information

☐ Identification documents for the I-9 Form

☐ Benefits election information (i.e., dependents or beneficiaries' names, social security numbers, PCP information, etc.)

☐ Bank account information for direct deposit

☐ **Prepare their equipment and office.**

Clean the new employee's work area and make sure you have enough lead time to procure equipment, including the following:

☐ Office (cubicle or workspace)

☐ Computer and accessories

☐ Phone and/or cell phone

☐ Desk

☐ Necessary software licenses

☐ Key fob for office entry

☐ Parking pass or other arrangement

☐ Timekeeping system access for hourly employees

☐ Business cards and supplies

☐ Send an announcement to current staff about the new hire's arrival.

By sharing a bit about the new hire, you can both inform your current team and make the new employee feel welcome.

☐ Assign a mentor to the new hire.

Appoint a designated "go-to" person who will "own" communication with the employee, introduce them to co-workers, answer any questions, and address concerns. Be sure to share this relationship with everyone who needs to know. Why? Having a mentor assigned to the individual will help them get acclimated to all parts of the organization, which fosters relationship-building and gives them a peer they can connect with.

PHASE 2: ARRIVAL & ONBOARDING

> **Timeline:** The first day.
>
> **Goal:** Make your new hire feel welcome and excited about their new job.

Check off all these boxes for a successful first day:

☐ **Identify someone to greet the employee.**

This could be the new hire's manager, their point of contact (mentor) identified in the previous step, or anyone else who might provide a welcoming hello.

☐ **Give an office tour.**

Show the new hire their own workspace, the lunchroom (and where they can leave their lunch bag), bathrooms, exits, etc. This is also a good time to provide passwords and office keys, and to explain how to get back into the office if they leave midday.

☐ **Make introductions to teammates, co-workers, and leadership.**

One suggestion we like is to provide a welcome breakfast. Spring for some

bagels and donuts and invite employees to gather in a common area where everyone can introduce themselves. This is an informal way to make sure the new employee feels welcome.

> ## Onboarding Tip
>
> Let your new employee start 30 minutes later than usual on their first day to allow staff and teammates to be prepared for their arrival. It isn't a normal day for the new hire or their manager, so it doesn't need a normal schedule.

☐ **Review paperwork and policies.**

  ☐ Review any electronic paperwork completed in advance (and finish paperwork that could not be done until the first day).

  ☐ Review the employee handbook and company policies.

  ☐ Prepare a calendar for their first week or two, so they know what their job will look like on a day-to-day basis for those initial weeks. Explain time off policies, and show how to request time off, including paid time off and sick time.

☐ **Provide a job description.**

Making sure your new hire understands their job description is the key to making sure they—and you—know how success is measured in a particular position. The job description can mirror the job posting, but be sure it also includes essential functions of the job; it should later be used for reviews.

☐ **Make sure they have someone to eat lunch with on the first day.**

Assign a couple of people to invite the new hire for lunch, so they can get an idea of "how things work" at the office during lunchtime.

For Remote Workers

Most of the same onboarding tasks apply to remote workers, too. You'll want to provide login credentials beforehand, but you should still take time to introduce the team, walk through policies and procedures, create a calendar for the first two weeks, and provide the new hire with a contact person to answer any questions that may arise. Instead of having an "office tour," give them a walk-through of your online systems, so they can see how things will work as a remote employee. Conduct verbal or video introductions where possible, with the goal being to make them feel connected to the team.

PHASE 3: SUCCESSFUL INTEGRATION IN THEIR ROLE

Timeline: The first 30 days and beyond.

Goal: Train and educate your new hire on what's expected of them in their role, how their role fits into the company, and how your company fits into your industry.

What's considered appropriate training will vary from company to company and position to position, but the goal is to make sure you're equipping your new hire with all the information they need get a clear view of your organization and how it runs (and see how their work supports it!).

Some things you must include in your training:

☐ **Identify stakeholders within your company.**

Tell the new hire which employees or departments in the company will be impacted by their work and how they can best interact.

☐ **Identify the purpose of the new hire's job beyond the job description.**

Employers should share organizational or departmental goals with their new hires that help define how the position fits in with the rest of the organization.

☐ **Train the new hire in the systems used.**

For example, something as simple as sending an email may have complexities this employee won't be aware of—things like email signatures, resources available, and where to save files.

☐ **Set expectations for responsiveness to calls and emails, in-person visits to customers, and internal and external communication.**

Training time varies from job to job, but it will likely last at least the first two weeks. Training is an ongoing process that can last for months depending on the complexity of the position and the amount of repetition in the role.

☐ **Have an informal check-in after 30-45 days.**

This is an opportunity to gather feedback and make sure the new hire is learning what they need to know to meet the requirements of the job. With that information, the manager can adjust what isn't working *before* the 90-day performance review.

☐ **Have a formal review of performance at 90 days.**

Managers should establish communication and seek the new hire's feedback on what's working well for them and what they think they can improve based on the standard set forth in the job description. It's also a time to provide feedback on progress being made on performance expectations. Look for actionable items, document them, and follow through.
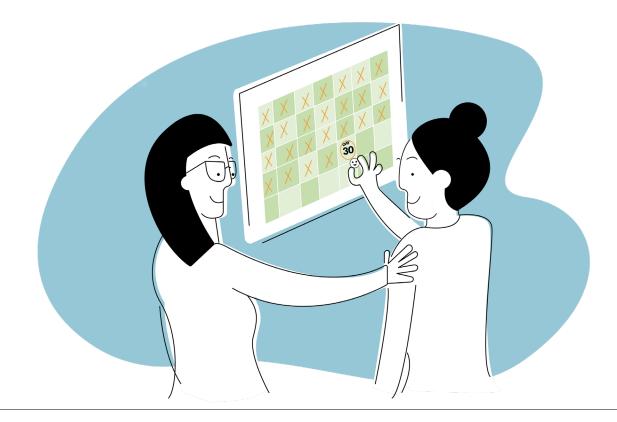
☐ Get your new hire's feedback on your onboarding process.

Apart from their performance review, you should collect their feedback on your company's onboarding. Share it with your team, and use it to improve the process.

BEING DELIBERATE IN YOUR ONBOARDING PROCESS MATTERS.

In an article by [The Society of Human Resource Management (SHRM)](#), a 2013 Aberdeen Group survey found that **an engaging onboarding program helped retain 91% of its workers** through their first year. In the current workplace climate of revolving doors, the importance of retaining your greatest investment—your employees—cannot be overstated. (After all, the average employee search [can cost up to 200% of the employees' salary!](#)) Making their first 30 days meaningful is one powerful way to do just that.

SAMPLE OFFER LETTER

Company Logo or Letterhead

Date

First Name Last Name
Street Address
City, State, ZIP code

Dear First Name,

On behalf of [Company Name], I am pleased to extend an offer of employment to you. Your start date will be [Employment Start Date]. The following outlines the major elements of our offer:

- The starting salary for this position will be [$xx,xxx per pay frequency pay period], which is equivalent to [$xx,xxx per year].

- [Company Name] is pleased to provide you with a wide range of benefit plans. Our flexible benefit program provides you with the opportunity to create a benefits package that meets your individual needs in areas such as [medical, dental, vision, disability and life insurance as well as flexible-spending accounts. In addition, we offer an Employee Savings Plan (401k). The Company Name will contribute a matching contribution on your behalf in an amount of 100% of your elected deferrals up to 4% of your compensation each payroll period.]

- You will be eligible to accrue [three weeks] of vacation per calendar year. Pursuant to current company policy, you are also eligible to accrue [eight] sick days per calendar year. The amount of vacation and sick time is prorated during your first calendar year of employment.

Additionally, as required by the Immigration Reform and Control Act of 1986, within three days of your date of hire, you must provide us documentation of employment eligibility in the United States and picture identification. This requirement applies to U.S. citizens, as well as foreign nationals. A list of approved documents that are acceptable as verification of employment eligibility under the Act are listed on page two of the I-9 form, which will be

provided with your application. Please bring the appropriate documents with you on your first day of employment.

This letter does not constitute a contract of employment for any particular period of time and your at-will employment can be terminated by you or [Company Name] at any time.

[First Name], we are excited about the possibility of you joining our organization and helping us to achieve our goals. We look forward to your favorable response and ask that you signify your acceptance of this offer by signing the enclosed copy of this letter and returning it to me within the next ten days. If you do not accept this offer, it will expire ten days from the date of this letter. Please feel free to contact me at [Phone Number] with any questions you may have.

Sincerely,

Authorized Signature
Title
Company Name

Accepted: _____   Date: _____