

ONBOARDING CHECK LIST

These are suggestions for the supervisor of the new employee to ensure a welcoming environment that helps the individual to be set up for success, acculturation, and retention.

Phase 1: Recruitment & Attraction

- ❑ Devise a diverse advertising plan that clearly attracts the right applicants. Beforehand, write a page about your ideal candidate. Have these details, your company's brand, & your team's values included in the posting.
- ❑ Implement an employee referral program so that current employees feel inspired to draw in new talent.
- ❑ Devise metrics for review applications and craft behavioral interview questions that address your company's values and the characteristics and competencies evaluated in the annual review. Determine who should be in the interview room & if you would like to include a "working interview" or knowledge demonstration during the process.
- ❑ When making the offer, be prepared to negotiate within the salary range. If negotiation isn't possible, share the plan for increased compensation & skill development along the way.

Phase 2: Preboarding

- ❑ After acceptance, send a welcome letter or email communicating expectations, and perhaps the entire employee handbook including dress code, hours, location, documents to bring, where to park, how to access the building/office, and who will greet them upon arrival on their first day.
- ❑ Prepare for their support: IT logins, hardware, software & building access, needed tools (badge, keys, uniform, etc). human resources paperwork, payroll enrollment, new employee orientation, etc.
- ❑ Create their "first 2 weeks" calendar including who will train them when, shadowing & training times, employee orientation, getting squared away with HR, and meeting times with their supervisor. Send meeting invitations and block your calendar as appropriate.
- ❑ Map out how to make their "first day experience" memorable, welcoming and in line with your culture.

Phase 3: Day 1

- ❑ Communicate department-wide about the new hire (start date & short description).
- ❑ Review the role of the employee & share the first 2 weeks calendar.
- ❑ Orchestrate a facility tour, introduction to key members & assign a first-month buddy or sponsor (someone to show them the ropes beyond their supervisor).
- ❑ During a 1-on-1, introduce them to the organizational structure, mission, values, culture and how their role matters. Consider sharing a video from the CEO as well as your own



leadership philosophy. Ask questions like: “What would you like for me to know about you?” “Regarding your new job, what do you feel most competent and least competent about?” and “How do you learn best?”

- Share expectations that are both written and unwritten.
- Consider having a team lunch.

Phase 4: Onboarding (up to 2 weeks)

- Discuss when and how to check-in & ask questions.
- Discuss goals, milestones, and expectations beyond the first 2 weeks. What does success look like at key intervals (1 month, 3 months, 6 months, 12 months). If applicable, review the probationary period: How long is it? What does it entail? Discuss which meetings to attend, a schedule pattern of 1:1s for feedback & training & questions, what resources and standard operating procedures they should be reviewing, and how to prioritize. Share what is evaluated in the annual review process.
- Engage the first-two weeks schedule.

Phase 5: On the Job Training & Support (up to 12 months)

- Provide attachment survey within 3 months for feedback on their on-boarding process.
- Continue learning the product & nuances of the role.
- Provide feedback opportunities in continued 1-on-1s.
- Maintain a conscious focus on “what’s working,” team environment.

Reflection Questions:

Where would you like to make more effort? How would you improve this area?

| Where are you currently thriving?