

ONBOARDING ASSESSMENT

Instructions

This assessment is designed for people overseeing the organization's onboarding process. Take this assessment to measure where you are with the five phases of the onboarding process.

Answer the below questions with the 5-point scale and choose the rating you agree with most for each question. Calculate your total score.

5=Very much like me

4=Like me

3=Neutral

2=Unlike me

1=Very unlike me

1. It is standard practice to provide a first-day agenda to our new hires prior to their first day.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

2. We always ensure there are zero surprises on the first day of a new hire.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

3. We have researched what today's candidate is looking for in an employer and incorporated those in our job descriptions.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

4. We intentionally provide opportunities for new hires to get to know their team members within the first two weeks of employment.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

5. We create goals for each new hire to inform their ongoing training needs.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

6. We regularly review the onboarding survey responses to update our onboarding process.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

7. We always discuss the organizational mission, values, and culture on the first day of hire.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

8. We always share the two-week training outline with each new employee.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

9. We explicitly state our values in our job descriptions.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

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10. Our interview questions are updated regularly and designed to identify values aligned with candidates.

1 Very Unlike Me	2 Unlike Me	3 Neutral	4 Like Me	5 Very Much Like Me
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11. We ensure each new hire knows who to go to with questions and the location of resources.

1 Very Unlike Me	2 Unlike Me	3 Neutral	4 Like Me	5 Very Much Like Me
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12. We include shadowing or mentoring in the first two weeks of hire.

1 Very Unlike Me	2 Unlike Me	3 Neutral	4 Like Me	5 Very Much Like Me
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13. We always schedule regular 1:1s to ensure feedback conversations are happening early and often.

1 Very Unlike Me	2 Unlike Me	3 Neutral	4 Like Me	5 Very Much Like Me
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14. It is standard practice to send out department-wide communication to introduce the new hire and provide the start date.

1 Very Unlike Me	2 Unlike Me	3 Neutral	4 Like Me	5 Very Much Like Me
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15. We review the Standard Operating Procedures (SOPs) with each new hire.

1 Very Unlike Me	2 Unlike Me	3 Neutral	4 Like Me	5 Very Much Like Me
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Answer Key

Calculate your total score from the questions above and find the corresponding category.

Score: 55-75 Onboarding Master

You are very thoughtful about planning out the onboarding process. Use your onboarding survey feedback to make any fine-tuned adjustments to your onboarding process. If you are not getting suitable applicants, dive deeper into tailoring your job advertisement. Challenge the norms around advertising and the application process. How can you make it easier for someone to apply? If you don't have control over the application process, consider pre-screening applicants by allowing them to send a resume for consideration. Review resumes, call back promising candidates, and walk them through the application process. This personal touch will increase the likelihood of great candidates taking the time with lengthy applications.

Score: 34-54 Onboarding In Progress

You check many boxes, but a few tweaks can profoundly impact your onboarding experience. Review the boxes you did not check. Pick three you can act on immediately and create a plan for implementing those changes before your subsequent onboarding. If you don't already, we highly recommend starting with the onboarding survey or interviews to get the ball rolling. Ask specific questions about what they wish their onboarding experience had included. Ask how organized they felt the onboarding process was and how easy it was to develop relationships at work. Ask if they felt set up for success and if any of your unchecked boxes would have made a difference for them.

Score: 15-33 Onboarding Help Needed

Without direction, the onboarding process can feel overwhelming and complicated. Start by identifying the highest priority for your unchecked boxes in each phase. Next, educate your team on the 5 phases of the onboarding process and its connection to retention. Pull in others to help you implement the basics of each onboarding phase, and start asking for feedback on the onboarding process from new hires. Ask specific questions about what they wish their onboarding experience had included. Ask how organized they felt the onboarding process was and how easy it was to develop relationships at work. Ask if they felt they were set up for success and if any of your unchecked boxes would have made a difference for them.

Answer Key

This assessment measured your current onboarding in each of the five phases.

Phase 1: Recruitment & Attraction (Questions 3, 9, & 10): We have researched what today's candidate is looking for in an employer and incorporated those in our job descriptions. We explicitly state our values in our job descriptions. Our interview questions are updated regularly and designed to identify values aligned with candidates.

Phase 2: Pre-boarding (Questions 1, 4, & 6): It is standard practice to provide a first-day agenda to our new hires prior to their first day. We intentionally provide opportunities for new hires to get to know their team members within the first two weeks of employment. We regularly review the onboarding survey responses to update our onboarding process.

Phase 3: Day 1 (Questions 2, 7, & 14): We always ensure there are zero surprises on the first day of a new hire. We always discuss the organizational mission, values, and culture on the first day of hire. It is standard practice to send out department-wide communication to introduce the new hire and provide the start date.

Phase 4: Onboarding (Questions 8, 12, & 15): We always share the two-week training outline with each new employee. We include shadowing or mentoring in the first two weeks of hire. We review the Standard Operating Procedures (SOPs) with each new hire.

Phase 5: OTJ Training & Support (Questions 5, 11, & 13): We create goals for each new hire to inform their ongoing training needs. We ensure each new hire knows who to go to with questions and the location of resources. We always schedule regular 1:1s to ensure feedback conversations are happening early and often.