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Welcome onboard!

ESSENTIAL CHECKLISTS FOR EMPLOYEE ONBOARDING





What is onboarding?

The Oxford Dictionary **defines onboarding** as—“The action or process of integrating a new employee into an organization or familiarizing a new customer or client with one’s products or services.”

A successful onboarding process starts when the chosen candidate’s interview stops. This marks the beginning of an active **engagement** between the employer and the new employee.

While some businesses adopt an onboarding schedule that lasts for a day, others will integrate their new hires into the team with **preboarding** and onboarding processes that extend well beyond the new person’s first 90 days of employment.

Why onboarding matters

The saying, “you never get a second chance to make a good first impression” is as true for companies as it is for people. HR leaders who understand this, and optimize their onboarding to create a positive first impression with new hires, can reap a wealth of benefits, including better cultural inclusion, and increased engagement.

Improved retention

HR leaders who introduce structured onboarding, and focus on retaining their people, are more likely to avoid the high costs, lost productivity, and potential damage to their **company culture** that can result when people leave their jobs. People who experienced a good and structured onboarding process when they joined a company are **81 percent** more likely to still be employed there one year later.

Increased productivity

Whether new hires are a direct replacement for people leaving an organization or they’ve been hired to fill new roles, it takes time for new people to get up to speed. A study by The Aberdeen Group found **54 percent** of organizations with a formal onboarding process experience greater new hire productivity.



The objective of employee onboarding

Ultimately, the objective of good employee onboarding is increased engagement, a productive workforce, and the retention of talent.

The wider business, HR professionals, and new hires all benefit when a company has a structured onboarding process.

For the business, an onboarding checklist for new hires ensures compliance with legal regulations. It ensures a system of fairness and equality, so one new hire isn't left behind if another has a more diligent, hands-on manager. And it means new hires can start being productive and contributing to the company soon after they join.

On a wider scale, effective onboarding also helps reduce churn—so businesses can avoid the expense of recruitment.

For HR professionals, an onboarding process checklist reduces the admin associated with welcoming new people to the company—a particularly significant benefit in fast-growing companies that are bringing in new employees on a weekly basis.

When they know all the support their new hires need is in place, HR professionals can focus their time and attention on other business areas.

For new hires, when their employer follows a checklist, it creates consistency, nurturing a genuine feeling of belonging from day one.

With the support they need to start work and focus from the outset, new people can soon develop a sense of commitment to their new employer and start contributing to the bottom line.



What is an onboarding checklist and how is it helpful?

A good onboarding process has a lot of parts that usually need to be juggled simultaneously. This is why it's so important to have a solid procedure in place.

When creating the onboarding process for your organization, you have to make sure that you have covered five key areas: compliance, logistics, management, training, and cultural engagement. Your organization may require additional items that are particular to your business or industry as well.

1. Compliance

Legal compliance and compliance with your organization's rules, can often be completed remotely, and in large part before the new starter's first day in the office:

- Contracts of employment
- Informing HMRC of the new employee and their tax code
- Reading company policies
- Health and safety training
- Any other legal requirements relevant to your business (e.g. non-disclosure agreements)

2. Logistics

Logistics are the basics that mean your new hire can turn up at the right place in order to do their job:

- Locations and directions, so they know where to go
- Ensuring ease of access if the employee has a disability
- Locating their desk
- Setting up their phone
- Providing a computer or helping them set up their own device for your systems
- Giving them internet access
- Getting them set up for payroll
- Giving them access to any specific systems that you use in the business – like Bob



3. Management

With good management, you're not just allowing the new hire to do their job, you're supporting them to get it right more quickly. This is where the hiring manager really gets involved:

- Providing relevant company and team information, like what you do and how you do it
- Setting up the new employee to use the company and team processes (e.g., booking meeting rooms or booking holidays)
- Setting objectives and goals for 30, 60, 90 days, so the new hire knows where to focus
- Adding the new employee to the company holiday calendar, and letting them know when they can start using their allocated time off

4. Training

The majority of new hires will need some training on arrival, so it's best to consistently provide learning opportunities that will bring them up to speed quickly:

- Introduce your learning processes, systems, and policies, so the new hire knows what's expected and that provision has been made for their development
- Carry out skills assessment to gauge knowledge and ability. This will influence their ongoing personal development plan
- Set up supervision and mentoring
- Set up any role-specific training

5. Cultural engagement

37 percent of the workforce has turned down a job offer because they felt that the culture wasn't the right fit for them or that they wouldn't get along with their colleagues. To get this right from day one:

- Explain company culture and values, so the new person understands your 'why'
- Meet with their direct team, and any people they'll work closely with on a regular basis
- Meet key people in the company, such as department heads, members of the management team, and IT support
- Help the new starter foster personal connections with the team based on work and personal interests
- Set up welcome events such as new-starter meetings with the CEO, "First Friday" after-work drinks, and welcome lunches



What should be included in your onboarding checklist?

An onboarding checklist is a way for hiring managers to organize the steps involved in guiding new hires through their first days and months at a company. Completing an onboarding checklist doesn't necessarily translate into a successful onboarding. The goal is to let new hires know what to expect during the early days and what the company wants from them in the long run.

Onboarding checklists tend to cover:

- Recruitment process
- Role of the employee
- Goal setting
- Job training
- Introduction to company culture
- Dates for check-ins
- Meeting with other employees or superiors
- Documentation
- Learning the company's product or service



Our new employee onboarding checklists

Onboarding checklist for the week before:

Day	Area	Action	Responsibility	
-7	Compliance	Prepare and send employment contracts.	HR	
-7	Culture	Set 'first Friday' drinks for new employee and their team.	Line Manager	
-7	Logistics	Check for any special access requirements.	HR	
-7	Logistics	Send the new starter directions and instructions for their first day.	HR	
-3	Culture	Book someone to take the new employee for lunch on their first day.	Line Manager	
-3	Management	Set new hire's orientation date.	HR	
-3	Culture	Set up new starter meeting with the CEO.	Hiring Manager	
-1	Logistics	Set up desk and welcome kit.	Facilities	
-1	Logistics	Open company email account & send usage instructions.	IT	
-1	Logistics	Open accounts for other company systems & send usage instructions.	IT & Hiring Manager	
-1	Management	Send new hire intro email to the department/company saying they're starting tomorrow.	Hiring Manager	
-1	Logistics	Add employee's name to any group lists, distribution lists, phone lists and websites.	HR	
-1	Logistics	Set up the new starter's phone and email them with the number.	Facilities	
-1	Logistics	Add the new employee to the company holiday calendar, and email them with details of when they can start using their allocated time off.	HR	



Onboarding checklist for the first day:

Day	Area	Action	Responsibility	
1	Compliance	Employee to complete their personal details in the HR system.	New Employee	
1	Compliance	Set up the employee as PAYE with HMRC.	HR	
1	Logistics	Employee to add their bank details to the payroll system/form.	New Employee	
1	Compliance	Provide HMRC new starter checklist to employee to print and sign.	HR	
1	Compliance	Employee provides passport or visa (right to work).	New Employee	
1	Compliance	Book health & safety training for new hire.	HR	
1	Compliance	Send any company-specific forms for employee's signature.	HR	
1	Logistics	Give new hire internet access.	Facilities	
1	Logistics	Set up new hire with payroll on admin side.	HR	
1	Logistics	Give new hire access to any specific systems that you use in the business (like bob!).	HR	
1	Managment	Provide relevant company and team information, like what you do and how you do it.	Line Manager	
1	Managment	Set up the new employee to use company and team processes (e.g., booking meeting rooms or booking holiday).	HR	
1	Training	Book health & safety training for new hire.	Line Manager	
1	Culture	Arrange for employee to have meetings with their direct team, and people they'll work closely with.	Line Manager	



Onboarding checklist for the first week:

Day	Area	Action	Responsibility	
2	Compliance	Share any relevant company policies.	HR	
2	Management	Set objectives and goals for 30, 60, 90 days so the new hire knows where to focus.	Line Manager	
2	Training	Introduce your learning processes, systems and policies for personal development.	HR	
2	Training	Carry out skills assessment to gauge knowledge and abilities.	Line Manager	
2	Culture	Set up meetings with key people (department heads, members of the management team).	Hiring Manager	
3	Culture	Explain company culture and values to the new hire.	Line Manager	
4	Training	Set up supervision and mentoring for the new employee.	HR/Hiring Manager	
5	Culture	Connect new employee with others in the company based on work and personal interests.	Line Manager	
7	Compliance	Enroll employee in pension plan.	HR	
7	Logistics	Enroll employee in other staff benefits.	HR/Employee	
30	Management	Carry out 1 month progress review meeting.	Line Manager	
90	Management	Carry out 3 month progress review meeting.	Line Manager	



Onboarding checklists for managers:

Day	Area	Action	Responsibility	
-14	Compliance	Prepare and send employment contracts.	HR	
-12	Line Manager	Sign and return the above forms.	HR	
-12	HR	Confirm receipt of signed contracts and send welcome email.	HR	
-7	HR	Send tax forms, health declarations, work permit confirmation, and insurance paperwork to manager.	HR	
-5	HR	Send preboarding questionnaire—shirt size etc.	HR	
-1	HR	Clean and tidy workspace or office to make sure it's welcoming.	HR/Facilities	
-1	IT	Create email accounts and ensure IT equipment and software is updated and ready for use.	IT	
1	HR	Offer a welcome tour of the office and an opportunity to meet and greet new colleagues and members of the team.	HR	
1	Compliance/ HR	Sign contracts, tax forms, health declarations, work permit confirmation, and insurance paperwork.	Compliance/HR	
1	HR	Outline the company culture, mission, vision, and values.	HR	
2	HR	Set goals and responsibilities.	HR	
3	HR	Assign a mentor.	HR	
3	HR	Arrange any on-the-job training and learning and development that's needed.	HR	
7	HR	Arrange regular meetings to make sure new managers have everything they need to be productive and address any potential issues.	HR	



Virtual onboarding checklist:

Day	Area	Action	Responsibility	
-14	Compliance	Prepare and send employment contracts.	HR	
-12	Line Manager	Sign and return the above forms.	HR	
-12	HR	Confirm receipt of signed contracts and send welcome email.	HR	
-12	IT	Request and order new hire's office hardware and software from IT department.	Line Manager	
-9	IT	Ship computer equipment and ask new hire to contact IT within 24 hours of receipt to arrange a set up call.	IT/Line Manager	
-7	HR	Send tax forms, health declarations, work permit confirmation, and insurance paperwork to employee.	HR	
-5	HR	Send preboarding questionnaire—shirt size etc.	HR	
-5	Employee	Fill out and submit preboarding questionnaire.	Line Manager	
-3	HR	Confirm receipt of new hire tax forms, health declarations, and insurance paperwork and send company swag.	Line Manager	
-2	Hiring Manager	Send new hire intro email to the team with their start date, arrange video conference with team for day one and other key co-workers for week one.	Line Manager	
-1	Manager	Welcome new hire with 1:1 video conference, agree on communication preferences for bridging distance or time-zones (check- in messages or mid-morning chat), hold team welcome call, assign a “work buddy” to new hire).	Line Manager	

Day	Area	Action	Responsibility	
1	IT	Arrange a conference call with new hire to set up and introduce company systems, provide passwords, and send additional usage instructions.	IT	
1	HR	Hand over tax forms, health declarations, and insurance paperwork.	HR	
2-7	HR	Send any additional legal forms that need to be signed—NDAs etc, introduce new hire to learning processes, systems, and personal development policies, ask employee to confirm bank details in employee records.	HR	



Employee onboarding documents checklist:

Day	Area	Action	Responsibility	
-16	HR	Employment offer letter.	HR	
-14	Compliance	Employment contract.	Compliance/HR	
-7	HR	Preboarding questionnaire.	HR	
-7	HR	Health declarations.	HR	
-7	HR	Work permit confirmation.	HR	
-7	HR	Insurance paperwork.	HR	
-7	Compliance	W-4 tax form—unless you're in one of the nine states that do not have income tax, employees will also need to complete a State Withholding Certificate. This is required so that state taxes can be paid where appropriate.	Compliance/HR	
1	HR	Company NDA.	Compliance/HR	
1	HR	Emergency contact information with names, phone numbers, and email addresses of two people.	HR	
1	HR	Employee handbook with standard operating procedures, internal policies and procedures, mission statement, and strategy.	HR	
1	HR	Organizational chart to help new hires understand who they report to and who reports to them.	HR	
1	HR	Payroll and benefits with direct deposit form and benefits brochure about any additional compensation schemes, medical insurance, or retirement plans.	HR	
1	HR	Company pension plan	HR	
1	HR	Company insurance plan	HR	
Within 3 days of start date	Compliance	I-9 employment eligibility form	Compliance/HR	



A nice welcome and introduction goes a long way toward helping a new hire to fit in. You can use **onboarding email templates** to help. Here are two essential emails that you can copy and paste. Just customize the parts in brackets:

- **Welcome email**
- **Introduction email**

Next steps after onboarding

After onboarding, how do you transition your new hire to the regular type of HR engagement that other people in their team receive? Do you have a plan?

Find the right time

We recommend looking at the cycle of things that you normally do with your team members and work out the best time to slot your new hire into them.

For example, if your new hire starts with you in May and you run your annual performance appraisals in June, it doesn't make sense to have them join the process in their hiring year.

Let them know what's expected

No one likes to find out by surprise about new procedures that they have to be part of, so let them know early on what's required.

A short email with a list, or a guide in your employee HR documents file, will mean they can refer back to it. After all, what's second-nature to you could be completely new to them.

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In a short time, Bob can be deployed to enable communication, collaboration, and connectivity that drives stronger engagement, productivity, and business outcomes.



For HR

it delivers automation of many common processes, allows greater oversight and visibility of the business, and centralizes all people data in a secure, user-friendly environment.



For managers

It provides access to data and insights to help them lead more effectively and streamline processes.



For employees

It's the tools and information they need to connect, develop, and grow throughout their journey.