

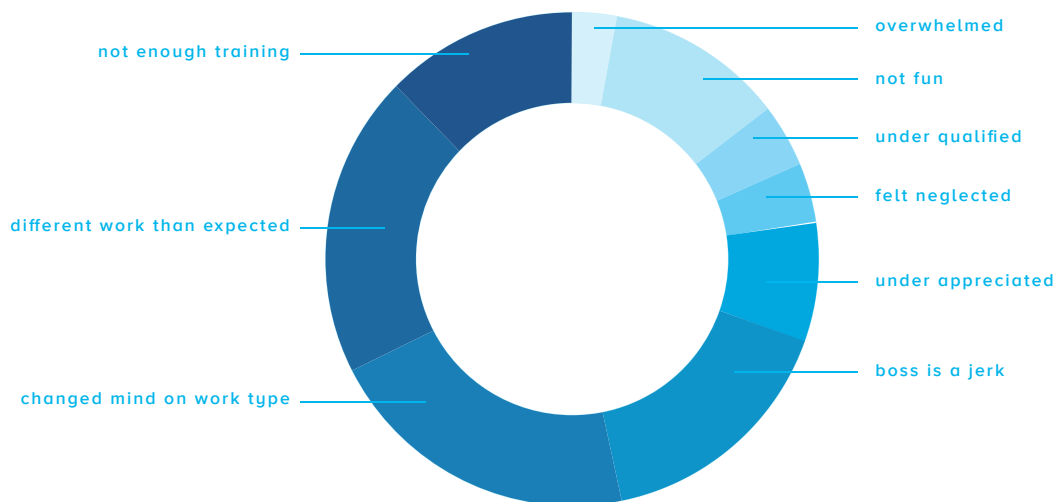
How to Build the Ultimate Onboarding Checklist (Hint: It's Not Just a Checklist)

[Data](#) from BambooHR exposes the three leading reasons for quick turnover—new hires don't like leadership they working under, the work is different than they expected, or they decided they don't like the work they're doing after all.

If only there was some kind of process in place that could help you and your new hires share more information about management, the company, and the nature of their role before you waste hundreds of hours recruiting and starting and bad fit...

Oh wait, there is.

The Real Reasons Why People Leave Quickly



source: <https://bamboohr.com>

It's called onboarding and organizations that get it right improve new hire retention by 82 percent and productivity by over 70 percent.

Your new hires want to hit the ground running and feel productive at your company. They don't want to have to search for another job and be the new kid at school all over again.

Imagine what could happen if your own onboarding checklist was outfitted to match this very desire?

On day one, new people walk in the door with already-established social networks within your organization. Everyone else knows they've arrived and what they do. They've not only been physically prepared but mentally prepared to start collaborating with their colleagues right away.

No need to waste any time—they've already been brought up to speed on their purpose in the organization, important compliance matters, and how to start being productive immediately.

Your new hire is already looking forward to pre-planned meetings with their management team, right-time training sessions, and ample touchpoints with an onboarding point person you assigned weeks ago.

This employee has been set up for success—and they're prepared to rise to the occasion—all because your company simply cared enough about their longevity to follow these best practices when developing an onboarding checklist that works.

Begin at Hire, Not at Day One

An invitation to your employee portal, a link to the workflow you created to automate and simplify their paperwork (no really, [there is such a thing](#)), or even just an email—whatever you do, get in touch with your new hire with something before their first day of work!

Reaching out to new hires to show them how excited you are to have them on your team may take a bit of art, but there's plenty of science to prove that it works.

A [University of Iowa](#) paper found that new employees who felt welcome in their new work environment reported more satisfaction, better performance, and were more likely to stay with that organization.

Unfortunately, the inverse was also true. An employee who didn't understand or felt misaligned with their company was more likely to be disengaged, less productive, and chronically dissatisfied. We wouldn't recommend you bank on this employee sticking around long.

So show that you care. Show that they're in the right place. Make sure your new hires feel welcome and that you've cleared their path to success by getting most of your transactional HR stuff out of the way before they've even step foot in the office.

Start the Welcome Wagon Early

That first day is big for a new hire, so we can see why some HR specialists and managers might think it's better to hold off on overwhelming new employees with tons of introductions.

However, the data would indicate otherwise.

Robert Half & Associates [found that](#) 89 percent of new employees want to meet their manager and 83 percent want to be formally introduced to their colleagues on their first day. Interestingly, only 44 percent thought it was important to be taken out to lunch that day.

But, if you do still plan on organizing a first-day lunch for a new hire, that'd be the perfect kind of thing to make sure they're aware of when you start working through your onboarding checklist way before day one.

Develop Structure for the First Few Weeks

Many of us have felt completely adrift at a new job after all the intros have been made and we're finally alone in a new workspace for the first time.

That's exactly why it's important to plan for that situation ahead of time. Don't make your new hire awkwardly feel out what they're supposed to do next or who they're supposed to reach out to during those first few weeks.

Again, this is an important cultural clue that says "Look—you're in the right place, we're excited you're here, and we've got our sh*t together!"

Instead, before they even start set up their digital calendar, your ticketing system, your automated onboarding workflow (bonus points if you've got [one of these](#) in place!), or whatever your organization uses to give them structure in those early days.

Be sure to wind down the "set up your desktop" and "meet with Dave in IT for permissions" tasks after a few weeks as they start working more and more on the job they were actually hired to do.

Assemble a Well-Rounded Onboarding Team

A cross-functional team is a great sounding board for many situations that arise within an organization—so why not implement one when it comes to the important task of creating an onboarding checklist that works?

Sure, HR has compliance totally covered; but IT understands what a new hire needs to get their workspace up and running, veterans in their department know what kind of day-to-day tasks they should be prepared for, and management knows which performance indicators they'll be held to.

And, as it turns out, having support and feedback from management early in the onboarding checklist is actually a pretty big deal for new hires.

A [study](#) published in the Academy of Management Journal found that new employees correlated their perceived support from management with role clarity, job satisfaction, and even salary. Unfortunately, the average new hire felt this support—and with it their perception of their job—decline as early as just six months after they started.

Like a map, a customized onboarding team—including a designated point person or "onboarding buddy" for the employee—helps new hires move through the onboarding checklist and get to full productivity faster than if they were just driving aimlessly.

Eliminate the Paperwork Bottleneck



80%

of HR administrators report that paperwork is still completed in person at a desk, conference room, or both



< 12%

of employees can access any single type of onboarding paperwork from a mobile device



79%

feel there is room for improvement with their organization's onboarding process



21%

are extremely satisfied with their organization's onboarding process

source: adp.com

According to an [ADP survey](#) of 1,500 employees, managers, and HR professionals; 80 percent of HR organizations still require their onboarding paperwork be completed in person. Fewer than 12 percent of employees can access any single type of onboarding paperwork from a mobile device.

Tax documents, employee handbooks, contracts, payroll forms, non-disclosure agreements, and even more paperwork are all necessary to the onboarding process...

Or are they?

At HelloSign, we're all about making our clients more awesome and business more intelligent. We don't think the answer to document-heavy workflows is just turning repetitive, overbuilt, 15-page healthcare enrollment packets into a repetitive, overbuilt, 15-page healthcare enrollment PDFs.

Instead, products like HelloSign allow new employees to complete their new hire documents online. If you want more automation, HelloWorks takes any series of documents and stitches them together with code to transform them into a single, [intelligent flow](#). Even hundreds of pages can be distilled into a short series of smart data fields. Human error and repetitive data entry are eliminated with conditional logic, data validation, and a mapping feature that makes sure that data goes right where you need it.

Yes, collecting new hire data is an important box to check on your onboarding checklist—but [who says you have to do it the way it's always been done?](#)

Set Clear Expectations and Regular Touch Points

"I have two kinds of problems, the urgent and the important. The urgent are not important, and the important are never urgent."

— [Dwight D. Eisenhower](#).

Between the unscheduled drop-ins, the ever-growing number in your email inbox, and the "fires" your colleagues and clients decide you're going to help them put out—it can be exceptionally hard for anyone to get done what they really want to get done at work.

Especially if you don't have a plan to stick to from the start.

Treat vagueness as the enemy. If you're not prepared to help new hires develop SMART goals and plan regular touch points for them with their point person and other members of their onboarding team—you should be held just as responsible as they are for missing expected performance benchmarks.

Don't Wait for It, Ask for Feedback

Didn't have a desk ready on their first day? Took you a week to get them logged into all the software platforms you use?

Lucky for you new hires won't just come out and say that they think you're doing a crap job—but that doesn't mean they aren't thinking it when they decide to take that call with a headhunter just in case.

One-third of employees decide if they're going to stay with an organization in their first month of employment. And you know what coincides perfectly with those first 30 days? Your onboarding checklist.

So instead of being shocked when another employee walks away in the early days, find a way to figure out what they're thinking and feeling. Don't wait. Ask for feedback.

Some employees will stop trying when they feel their higher-ups dismiss their ideas. Just asking for and listening to feedback can literally increase the productivity of your team and your entire organization!

Use your onboarding checklist to ingrain the habit of actively seeking out feedback on a regular basis to prevent unnecessary drag and turnover.

Integrate Your Culture at Every Opportunity

When Two authors of a [Harvard Business Review](#) article examined the findings of 70 different studies and found that feeling socially accepted at work was one of the biggest factors in a new hire being successful.

When an employee feels like part of the network, they feel empowered to ask questions, access the resources they need, and take the big steps that can move your company forward.

Your new hire onboarding process is your best opportunity to tell the story of who your company is and why it's exactly where they belong. If you want each employee to be on the same page of this story, you

better start consistently implementing cultural education into your onboarding checklist.

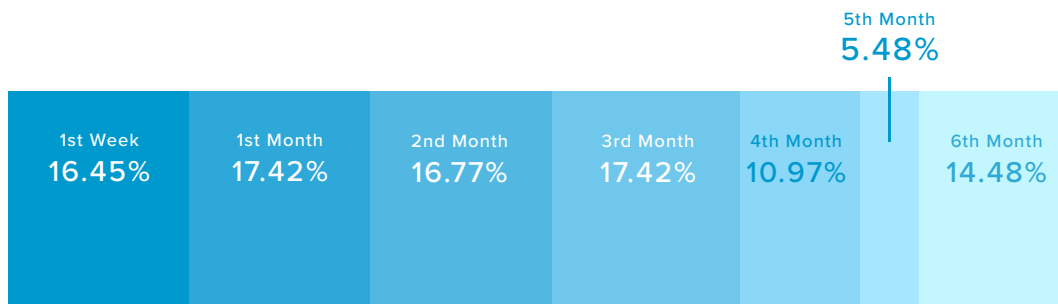
Poorly-communicated, inconsistent, or nonexistent cultural messaging will derail a company's progress toward strategic objectives. When each employee has a different understand of your organization's goals and mission, how could they possibly align to arrive at the same destination?

If you need help integrating your company culture, learn more about practicing transparency, imparting purpose, opening communication, and more in [our guide for instill culture](#) in your onboarding checklist.

Don't Stop After a Week



31% of people have quit a job within first six months. How soon did they quit?



source: <https://www.bamboohr.com/blog/onboarding-infographic/>

However long you plan to take to complete your onboarding checklist is totally up to you, but we recommend it start from the day you choose a hire to at least six months after their first day.

Those steps that start well before they come into the office really are important. They don't just give new hires time to learn what to expect; they also give you and your team time to adequately prepare for adding a new colleague.

If your company has a 60- or 90-day probationary period, both your cross-functional onboarding team and their onboarding buddy should be supporting them up throughout that time to empower them to meet their first set of expectations.

While the onboarding tasks will certainly wind down over the next several months, be sure to account for any other specific trainings they should undergo to more deeply understand their role, the company, and opportunities for advancement.

It's also during this time that, instead of HR, other departments and specialties such as performance management might take the onboarding baton.

Even if your onboarding checklist doesn't officially account for an entire year out, a new employee's first end-of-year review should be tailored to recognize their inaugural year. By then any concerns they've had during the year have had time to crystalize, so be sure to open the floor for feedback and make sure they feel comfortable with the lay of the land and their performance indicators.

The Ultimate Onboarding Checklist

Developing an onboarding checklist using the best practices we've outlined can increase a new hire's job performance, create stronger commitment to your organization, and create job satisfaction—all of which reduce turnover and can save you thousands of dollars and hundreds of hours replacing an employee that could've been retained with more thoughtful onboarding.

Go into this knowing that it won't all be easy and it won't all be on the employee's shoulders. The point of creating an ultimate onboarding checklist is doing the work up front to ensure your new hires, your HR department, and your organization as a whole are empowered to reach their full potential without losing any sanity or teammates along the way.

We compiled this ultimate onboarding checklist with help from [Betterteam](#) and [Process Street](#). We encourage you to make it your own to create an onboarding workflow that makes sense for your awesome, unique team.

Before Day One

- Assemble their cross-functional onboarding team and introduce their point person or “buddy”
- Make sure you and the new hire's supervisor are aligned on role, goals, and responsibilities
- Get all the legal forms and documents filled out
- Prepare employee's workstation
- Give access to any tools, devices, doors, etc. they will need
- Create accounts for them on any software they'll need to do their job
- Send any manifestos, handbooks, or articles you usually have new hires read
- Prepare benefits package including a summary of FAQs
- Provide a copy of the job description with responsibilities

On Day One

- Make sure your team knows they're arriving and have the hiring manager ready to greet them

- Formally welcome them to the team and make introductions
- Take a tour of the office
- Start their training material workflow
- Have them scheduled to meet with management to revisit expectations
- Review company culture
- Make sure they meet their point person, in person

During the First Week

- Get them going on their first real work project
- Go over expectations for the following month
- Schedule at least one touch point to collect feedback and answer questions
- Encourage them to communicate with their point person

During the First Month

- Have several touch points with you, management, and their point person already planned
- Explain long-term, high-level company goals so they are aligned on direction and culture
- Provide reading material for personal growth
- Set up a few small events to encourage them to socially interact with the team
- Ask for feedback on your onboarding checklist

After Three Months

- Schedule an informal performance review
- Review past and future assignments to ensure alignment
- Review former performance goals and set new expectations
- Give and ask for feedback again
- Check employee progress on training
- Discuss end of probationary period and expectations afterward

- Check in on how they're feeling about company culture and how they fit into it

After Six Months

- Conduct a six-month performance review
- Review employee goals and progress so far
- Set goals and objectives for the next six months
- Check that employee has received all necessary training
- Open the door for honest feedback
- Make sure they still feel a strong cultural connection

After One Year

- Conduct a yearly performance review
- Recognize their first year at the company and review how they met expectations
- Discuss goals, projects, and plans for the upcoming year
- Discuss compensation and raise policies
- Ask for—and listen to—feedback on your onboarding checklist and company culture
- Congrats, you made it to the year-one milestone! Look forward to the next awesome year of working together.

