

Best Practices Onboarding Checklist

| New Employee Information | | | |
|--------------------------------|--|-------------------|--|
| Name | | Start Date | |
| Position | | Supervisor | |
| Office/Cubicle Location | | Phone # | |

BEFORE THE EMPLOYEE'S START DATE

- Send welcome packet with important information (ie; benefits and first day logistics) and welcome memo.
- Provide company and job information.
- Encourage the review and completion of paperwork before Day 1.
- Contact new employee to answer questions and set expectations.
- Assign a mentor/buddy/go-to person.
- Assign and prepare workspace and provide office supplies.
- Ensure office essentials (ie; computer, phone, email, training information) are set up.
- Arrange for a group of staff members to treat new hire to lunch on Day 1.

FIRST DAY/ ORIENTATION

If possible, personalize the Day 1 experience with something unique from the company (ie; business cards, nameplate, etc.)

Communicate vision and mission, and administer a formal statement about your firm.

- How we do things
- History
- Culture
- Company Literature
- Product(s)/Service(s)
- Resources for Company Information
- Introduce new employee to mentor/buddy
- Introduce new employee to team/work group
- Employee Handbook to be completed within the first three days of employment
- Provide copy to employee with instructions to read
- Review critical policies with employee
- Receipt of Handbook-place in employee file/Employment folder

Complete paperwork and security requirements

- New Employment Information form
- Form W-4 and State/Local tax forms
- Form I-9
- Non-complete/Nondisclosure Agreements, is applicable
- At-Will policy returned-place in employee file/Employment folder
- Confidentiality Agreement (if separate from At-Will)
- Drug Free Workplace Agreement (if separate from At-Will)
- Health Care Exchange- General Notice

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- Employee Information form
- Review job description
- Have the new hire sign their job description
- Return hire sign their job description
- Return of Company Property form
- Organizational Chart
- Employee Reference Guide (see Tab)
- Provide realistic information about the organization and its culture to avoid “over promising”
- Tour facilities: Restrooms, Reception, Kitchen/Vending, Employee Entrance/Parking, Smoking location, Time Clock
- MANAGER- New Hire Reporting

FIRST WEEK

- Ensure that job roles and responsibilities are clearly communicated to the new employees
- Introduce the new employee to other employees and senior staff
- Introduction to the Job**
 - Work Space
 - Work Hours, Breaks, Mealtimes, and Other Rules
 - Equipment (for example, copier, fax machine)
 - Machinery, if applicable
 - Telephone and Fax Numbers
 - Mail and Overnight Delivery Service
 - Tools
 - Keys
 - Business Cards
 - Office Supplies
 - Cellular Telephone/Laptop and Other Electronics
 - Purpose, Duties, Responsibilities, Performance Expectations and Goals
- On the Job Training**
 - Computer System
 - Logon
 - E-mail
 - Software Applications
 - Telephone System
 - Expense Reports where applicable
- Provide meaningful work for the new employee—either training or substantive work related to the new job
- Ensure that a senior leader (in the new employee’s office) welcomes the new employee
- Review the organizational structure and key staff

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- Provide a list of contacts who can address the new employee's questions on a variety of issues
- Compensation and Benefits**
- Review applicable fringe benefits with the employee. [Provide employee with necessary paperwork to enroll
 - Pay Procedures (for example, payroll reporting, payday)
 - Performance Review Process- TBD
 - Paid and Unpaid Leave (FMLA where applicable)
 - Health/Dental/Vision
 - Section 125/FSA/Unreimbursed Medical & Dependent Care Expenses
 - Retirement Benefits
 - Timesheets
 - Other
- Safety Rules**
 - Safety/Emergency Procedures
 - Emergency Exists
 - Injury Prevention
 - Reporting Injuries
 - Job specific safety training, if applicable
- Gather feedback about the orientation program from new employee

FIRST 30-90 DAYS

- Meet daily the first week of employment (recommend 30 minutes huddles daily)
 - Review weekly "how it's going" for the new employee
 - Address any concerns or questions
 - Review the job description in case of necessary clarifications or modifications
 - Schedule the new hire's 30-day and 90-day performance reviews
 - Provide feedback early and often in the first 30 days
 - Provide training, as needed, to help the new employee understand internal systems, general operating practices and obtain other information or skills required in the performance of his or her job
 - Discuss individual work styles and preferences to make sure all are communicating and collaborating appropriately
 - Arrange for the new employee to meet key stakeholders from other departments (keep a check list to be certain that this is accomplished; send a memo to those stakeholders explaining the benefit of this practice)
 - Check with new employee regularly to ensure that they continue to assimilate and expand their knowledge and capabilities
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FIRST YEAR

- Provide training to build competencies and fill any skill gap.
- Conduct a new employee survey and address any issues surfaced
- Assess the performance of the new employee periodically –formally and informally- and provide feedback;
 - Information “manager check-ins” should occur regularly in addition to formal performance assessments, which should be completed after six months and one year.
 - HR should send a reminder email to managers at the sixth month and one-year mark to ensure that formal reviews occur.
- Ensure a senior executive or manager sends a congratulatory email or letter on the employee’s one year anniversary.

Managers play a critical role during an employee’s first few days on the job. Over the long term, managers directly affect the employee’s job satisfaction. Given this impact, it is vital.

FIRST DISCUSSION WITH NEW EMPLOYEE TALKING POINTS

- Introduce yourself, and talk about your role in the organization
- Discuss how your office fits into the larger organization and the role it has supporting the organization’s mission
- Review the new employee’s job description- discussing the work he/she will do, who they will be working with and performance expectations
- Review the performance review process
- Talk about your style as a manager and expectations for the employees who work with you (ie; do you prefer phone calls, emails, or other? Do you have an “open door policy” or do you prefer people to schedule a time with you in advance? What is your general managerial style? How can someone work best with you?
- Let the new employee know how often he/she should interact with you, especially initially.
- As if they have questions or concerns.

SAMPLE WELCOME E-MAIL FROM MANAGER

TO: Team
FROM: Manager
SUBJECT: Welcome Jane Doe

Dear Team,

Please welcome Jane Doe, a new Program Analyst, to our team. Jane’s first project will be leading the Performance Management initiative.

Jane comes to us from the Department of Education, where she was an Assistant Program Manager for three years. Before that, she worked in the private sector for Atlantis Corp.

Jane is originally from San Francisco, but enjoys living in Washington DC which she considers to be her adopted home. In her free time, Jane is an avid skier and enjoys traveling.

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Jane's first day of work is June 12 and she will be located at _____. Please stop by and introduce yourself.

Manager

PRE-FIRST DAY COMMUNICATION PLAN

There is critical need to communicate with new employees between the time they accept an offer and their first day on the job. This communication provides information, answers questions, and reduced administrative processing on the first day, and allows a smoother transition for the new employee. Communication should be structured at specific times during the onboarding process. The outline below summarizes who initiates the communication, what and how it is communicated.

Timing

After employment offer is accepted →

Initiator

HR →

Messages

Welcome
Introduction
Explain upcoming new employee process (ie; forms that need to be completed, suitability, security process) and set expectations
Provide basic information for the first day (ie; parking, badges, ID, pass cards, attire, where new office/cub is, what will happen for lunch
Information on go-to person/buddy
Answer questions and provide contact information

2-3 Days before First Day →

Go-to Person →

Reiterate basic information on first day (ie; parking, attire, where new office is, lunch information)
Describe lunch plans and orientation process
Provide any necessary contact information
Answer questions

INFORMATION FOR THE NEW EMPLOYEE

Pre-First Day Telephone Talking Points

- Introduce yourself; include where you work with the firm.
- Explain that you are there to help them through the pre-first day process.

TOOL TO BE PROVIDED BY YOUR MANAGER

- Checklist with a timeline of manager responsibilities
- Links to key forms (ie; job description, performance review, PIP)
- Suggested talking points for a:
 - first discussion with a new employee
 - 30-day, 90-day, six-month check in
 - one-year performance review
 - one-year performance review
- Template for a welcome email to send to new employees' team

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EMPLOYEE REFERENCE GUIDE

About us

Organization Overview

- History
- Mission Statement
- Core Values
- Basic organization structure and organization chart
- Leadership profiles; photos/brief bios
- Commonly used acronyms

Policies and Procedures

Key policies and procedures

- Ethics
- Codes of Conduct
- EEO Policy
- Sexual Harassment

Benefits

- Health Insurance Matrix
- Leave
- Parking
- Transit Benefit
- Other Benefit

Map of Building

- Warehouse
- Building
- Copy room, restrooms
- Parking, public parking, trucking
- Key offices

Navigating the Organization

How to find people in the organization: an overview of sources of information for finding individual, contact information, etc.

Office overviews/brochures: one page or brochure for each key support office with information on what the office does and contact information.

Web resources: overview of the organization's intranet and its capabilities (with screenshots and links)

Booking of any conference rooms

Key communication vehicles (ie; newsletters, bulletins)

Performance Management Policies

Training Requirements

HR Information

- Intranet
- Pay bands

Security Policies and Procedure

- Security and Safety Policies
- Emergency rules
- Confidentiality Procedures

Travel Policies and Procedures

Basic IT Information

- Key IT policies
- Computer usage agreement
- Email account and set up
- Voice mail instructions
- Sample voice-mail greeting and extended absence greetings
- Instructions for iPhone
- Overview of Outlook
- IT support services and contact info
- How to add a printer
- Helpdesk info

Your New Work Neighborhood

- Banks
- Grocery stores
- Convenience stores
- Health Clubs
- Restaurants
- Shops
- Hotels
- Pharmacies
- Map of area

Other

- FMLA
- Request for leave or approved absence form
- Holiday Schedule
- Payroll information/timesheet

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