

# Employee Onboarding Made Simple



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## Part 1: The Importance of Onboarding

### What Do You Mean by “Onboarding?”

*People use the term “onboarding” to refer to a range of processes.*

We view onboarding as much more than HR paperwork, a tour of the office, and setting up email. The first few weeks at a new job can overwhelm and bewilder any employee. You might have experienced something similar yourself in the past. The onboarding we’re talking about is designed to make that adjustment easier, faster, and more successful.

*Onboarding is the process through which you help a new employee become a productive member of your team.*

### Why Should We Bother with Onboarding?

*Because you spent time, effort, and money hiring a new employee, and you want him or her to succeed.*

According to the Society for Human Resource Management (SHRM)<sup>i</sup> :

- Half of all senior outside hires fail within 18 months in a new position.
- Half of all hourly workers leave new jobs within the first 120 days.
- And over 40% of the people who leave a company every year do so in their first six months.<sup>ii</sup>

But research has shown that **91% of first-year employees are retained in companies that have a formal onboarding program.**<sup>iii</sup>

**91%**

of first-year employees are retained in companies that have a formal onboarding program.



So, if you want to keep those amazing people you just hired, you need a good onboarding plan. Plus, you get some additional benefits:

## Onboarding Saves Money

According to SHRM's Human Capital Benchmarking Report,<sup>iv</sup> the average cost to hire someone is \$4,100 and it takes an average of 42 days to fill a position. You already spent that money and time bringing someone in. If you lose them in the first few months, you'll have to spend that time and money again on a replacement. If you're hiring for specialized or management positions, your costs could be much higher.

And the costs of a lost hire include not just the money spent on hiring, but also

- time spent preparing for and training a new employee.
- revenue lost or overtime paid to cover the vacant position.

- administrative costs of setting up tax records and benefits.
- management time to review resumes and do interviews.

## Onboarding Increases Loyalty

2015 Research by ADP found that new hires who were “extremely” or “very satisfied” with their onboarding were three times more likely to report being extremely or very loyal to their organization than those less happy with their initial experiences.<sup>v</sup>

A good start helps people quickly build a social network and figure out how to fit in with the company. It also helps them understand the company’s values and mission, which deepens their personal connection to the organization.

And it’s important to remember that a strong onboarding program tells new hires, “you are important to us.” They learn immediately that your company invests resources in their success, which they’ll want to reciprocate. A 2015 CareerBuilder survey<sup>vi</sup> found that 92 percent of employees are more loyal to companies who’ve invested in their skills through training.

## Onboarding Gets People Up to Speed Faster

Finally, new team members reach their stride sooner when you share corporate expectations, work processes and procedures up front. 18F, a software development arm of the U.S. government, reports faster time to productivity after implementing a comprehensive program.<sup>vii</sup>



***“The length of time new hires take to acclimate to our organization has been trimmed by a significant amount .... teams are able to work more quickly and efficiently.”***

## Part 2: On-Boarding Best Practices

If you're convinced by now that onboarding makes sense, it's time to discuss the best ways to implement your program.

### Start with Some Basics.

The Society for Human Resources Management (SHRM) suggests several best practices for any program:

- Be prepared for your new hire's first day.
- Make the first day special.
- Develop a written onboarding plan.
- Be sure your program is consistently implemented.
- Ensure that the program is monitored over time.
- Use technology to facilitate the process.
- Use milestones, such as 30, 60, 90 and 120 days on the job—and up to one year post-organizational entry—to check in on employee progress.
- Engage stakeholders in planning.
- Include key stakeholder meetings as part of the program.
- Be crystal clear with new employees in terms of:
  - Objectives.
  - Timelines.
  - Roles.
  - Responsibilities.
- Focus on the positive; minimize discussion of legal issues and disciplinary procedures, especially on day 1.

If this seems like a long list, don't worry. We've incorporated all these elements in our **Onboarding Template** so you don't have to keep track of them all.

### FIRST DAY TIP:

Focus on the positive in your company. Save the legal and disciplinary discussions for later in the onboarding process.

## Four Things That Will Kill Your Onboarding Goals

You can't have a list of "Dos" without a list of "Don'ts", so here are four key "Don'ts" that will sink your program.

1. Don't hope that onboarding will happen. Make sure one person takes ultimate responsibility for it.
2. Don't let management or leadership sidestep their responsibility for supporting new hires.
3. Don't give new people too much information too quickly.
4. Don't treat onboarding like nothing more than a checklist of paperwork.

National Association of Colleges and Employers (NACE Onboarding Done Right<sup>viii</sup>)

## Why Onboarding Should Be a Formal Program

At this point, you might feel that your organization covers the onboarding basics informally and you don't really need an official process. But research has shown that formal systems work much better.

According to a survey by Bamboo HR,<sup>ix</sup> 43% of respondents think that time and money are wasted on ineffective onboarding processes. And a survey by Office Team<sup>x</sup> found that many employees had less-than-stellar introductions to their new companies:

**33%**

didn't have phone,  
computer or security pass.

**22%**

did not receive necessary  
supplies.

**16%**

didn't receive an overview  
of company and policies.

**15%**

didn't get introduced to  
coworkers.

However, in the same study, 92% of human resources managers said their companies' onboarding processes were very effective or somewhat effective. A formal process will help prevent those mishaps and ensure a positive experience for new employees. With a written procedure, you can also measure results and improve over time.<sup>xi</sup>

## Some Additional Tips

Here are few supplemental ideas from successful onboarding programs. You don't have to incorporate these in order to have an effective plan, but they can improve your new hire's experience and enhance your benefits.

### *Use A Mentor*

While many industries don't typically assign mentors for new folks, a study of occupational safety and health professionals found that 92% of mentored participants said their first six months on the job had a positive impact on their decision to stay long term (5 years or more). For those who did not have a mentor, only 57% reported their first six months as having a positive impact on their intention to stay.<sup>xii</sup>

For diversity hires, research at Cornell<sup>xiii</sup> has found that "Mentorship has proven to be of critical importance for minority development and retention." And studies of mentors in healthcare and safety industries found those who mentor others had higher rates of promotion, higher salaries, and more self-reported career success.<sup>xiv</sup>



**92% of mentored participants said their first six months on the job had a positive impact on their decision to stay long term.**

## *Plan to Train*

In the Bamboo HR survey,<sup>xv</sup> 76% of respondents agreed that on-the-job training is the most important thing a new employee needs to begin contributing quickly. And Career Builder research<sup>xvi</sup> found that 60% of applicants expect to learn new skills on the job.

So a major part of your onboarding may be some skills training. Even if you don't include training in the first days or weeks, you should immediately set up a development plan for employees to begin upskilling. That plan can include formal courses, on-the-job experience, or a combination of both.

Online marketing provider Hubspot,<sup>xvii</sup> for example, uses a "learn and do" development model for initial training. As they describe it, "For each knowledge and skill area, a new rep would learn all the necessary elements in the morning and then put them into practice in the afternoon."

However you implement training and development, don't leave it out of your onboarding plans. Why get folks off to a great start, then forget to keep up the momentum?

## *Provide Extra Support When Needed*

Some folks may need a little extra guidance when they join your group. People who are relocating, high-profile hires, high-level executives, and diversity hires will have a harder time adjusting than others.

Plan to support them with extra check-in meetings, extra time to ramp up, onboarding mentors, and additional training if necessary.

TRAINING IS KEY

**76%**  
of respondents  
agreed that on-  
the-job training  
is the most  
important thing  
a new employee  
needs to begin  
contributing  
quickly.

## Part 3: How to Use This Template

Given the discussion above, we've created an **Onboarding Template** (attached at the end of this document) you can use as the basis of your formal program. It includes all the elements covered except skills training (which will be different for every company). Here's how to use it.

1. Copy the template and delete anything you don't want to use. You can always add things back later if you want to.
2. Review the task descriptions and objectives and make any customizations you'd like.
3. Identify who will fill the onboarding roles and share the template with them.

Use the template and the accompanying sample documents to plan meetings and check off onboarding activities. Then collect feedback on the experience and adjust the program to suit your needs. Over time, you'll hone the program for your company's needs and priorities.



“There are no little jobs. Just little desks.”

## The Pract.us Tool

At Pract.us, we provide a learning platform designed to quickly and easily bring the social, practical, and formal elements of onboarding together in one place. With the tool, it's a snap to manage the various onboarding tasks over several weeks. You'll significantly lower the management and administrative burden of helping new people adjust to your company. The tool even lets you put new hires in charge of their own onboarding process.

Since you've downloaded this white paper, we're making a special offer to you. You can use the tool pre-populated with the onboarding template and accompanying resource documents, **free of charge for 30 days.**

**START MY FREE TRIAL!**

(Or you can get started by visiting: [app.pract.us/trial-landing-onboard](https://app.pract.us/trial-landing-onboard))

## Resources

### Document Resources

Here are some of the forms you may want your new hire to fill out on or before Day 1. The Federal I-9, W-4 and state tax withholding forms are pretty standard for any company. You may want to include other documents, such as employment agreements, non-compete agreements or benefits enrollment forms. Work with your corporate lawyer and/or benefits provider for the appropriate forms.

[Federal I-9 Form for Employee Eligibility](#)  
[Form W-4 Federal Withholding](#)  
[State Withholding Tax Forms](#) (Select your state)

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# NEW EMPLOYEE ONBOARDING TEMPLATE

## How to Use This Template

This template includes all the elements described above except skills training (which will be different for every company and job description). Here's how to use it.

4. Copy the template or download this editable copy [here](#) and delete anything you don't want to use. You can always add things back later if you want to.
5. Review the task descriptions and objectives and make any customizations you'd like.
6. Identify who will fill the onboarding roles and share the template with them.

Use the template and the accompanying sample documents to plan meetings and check off onboarding activities. Then collect feedback on the experience and adjust the program to suit your needs. Over time, you'll hone the program for your company's needs and priorities.

New Hire Name:	
Start Date:	
Onboarding Owner:	

## Preparation Before Day 1

## Completion Deadline:

Preparation is the key to success with onboarding. The tasks to be completed before your new hire's start date will take the greatest chunk of your time. Review these tasks carefully, recruit help where needed (as with IT), and give yourself enough time to complete them.

### COMPLETE BEFORE DAY 1: Prepare Onboarding Materials

Done

OBJECTIVE:	Collect all useful information in one location.	<input type="checkbox"/>
Instructions:	Use a website or create a paper folder of key resources your new employee can refer to over the next few weeks. Include these things:	
	<input type="checkbox"/> Work hours <input type="checkbox"/> Employee manual <input type="checkbox"/> Dress code <input type="checkbox"/> Security process <input type="checkbox"/> Typical lunch times <input type="checkbox"/> Map/locations <ul style="list-style-type: none"> <li>○ Departments</li> <li>○ Restrooms</li> <li>○ Break rooms</li> </ul> <input type="checkbox"/> Emergency exits <input type="checkbox"/> Parking regulations	<input type="checkbox"/> Shared resources (e.g. share drives, wikis) <input type="checkbox"/> Manuals or cheat sheets for key general software that everyone uses <ul style="list-style-type: none"> <li>○ E-mail</li> <li>○ Security</li> <li>○ Time tracking</li> </ul> <input type="checkbox"/> Expense reporting <input type="checkbox"/> Regular meetings or communications (e.g. message from the CEO)

## COMPLETE BEFORE DAY 1: Prepare HR Paperwork

Done

OBJECTIVE: Have paperwork ready to complete on day 1.

Instructions: Collect all necessary paperwork for your employee to complete and review with HR.

As an option, send forms prior to your employee's first day so he or she can complete them ahead of time.

- Tax forms
  - Federal I-9 Form for Employee Eligibility ([link](#))
  - Form W-4 Federal Tax Withholding ([link](#))
  - State Withholding Tax Forms ([link](#))
- Employee information forms
- Citizenship forms
- Benefits package
- Employee manual
- Relevant policies and procedures

## COMPLETE BEFORE DAY 1: Prepare First Day Schedule

Done

OBJECTIVE: Have a clear plan for first day activities.

Instructions:  Follow [this link](#) to a first day schedule template to get you started. Or find the First Day Schedule Template at the end of this document.

- Adjust the template as desired.
- Confirm times and appointments with other people the new hire will meet with, such as HR, department managers, other team members, onboarding buddy, etc.

## COMPLETE BEFORE DAY 1: Prepare New Hire for Day 1

Done

OBJECTIVE: Give your new employee the key information to prepare for day 1.

Instructions: Email or mail a welcome packet to your new employee. Use the template in [this link](#) to get started. Or find the "Welcome Email to New Hire" at the end of this document.

- Include the following information
  - Time to arrive
  - Person to meet upon arrival
  - Parking/direction if necessary
  - First day schedule
- Copy the hiring manager or HR manager if that's not you.

## COMPLETE BEFORE DAY 1: Prepare the Team for a New Colleague

Done

OBJECTIVE: Give team members the necessary information to welcome their new colleague.

Instructions: Create and send an email announcement of the new hire to colleagues. Use the template in [this link](#) to get started. Or find the New Hire Announcement to Team at the end of this document.

- Include the following:
  - New employee's arrival date/time
  - New employee's role in the team
  - Ask people to introduce themselves at some point during the day.
- Copy the hiring manager or HR manager if that's not you.

## COMPLETE BEFORE DAY 1: Create a List of Key Contacts

Done

**OBJECTIVE:** Provide your new employee with a directory of resources they can call on in the first few weeks to answer specific questions.

**Instructions:** On a sheet of paper or an email, provide the following contacts.

(Choose the ones which will be useful to your new team member.)

- |   |   |
|---|---|
| <input type="checkbox"/> Human Resources          | <input type="checkbox"/> Project Team Leads |
| <input type="checkbox"/> Manager                  | <input type="checkbox"/> Department Heads   |
| <input type="checkbox"/> Payroll                  | ○ Marketing                                 |
| <input type="checkbox"/> Administrative Assistant | ○ Sales                                     |
| <input type="checkbox"/> IT Support               | ○ Professional Services                     |
| <input type="checkbox"/> Building Manager         | <input type="checkbox"/> Product Divisions  |

## COMPLETE BEFORE DAY 1: Prepare the New Hire's Onboarding Buddy

Done

**OBJECTIVE:** To prepare a team member who will mentor your new employee for the first months of employment.

- Instructions:**
- Select a mentor or buddy for your new hire.
  - Meet with the buddy to explain the role and responsibilities:
    - Checking in regularly to answer new hire questions and help resolve problems:
      - Meet every day for the first week.
      - Meet once a week for the first month.
      - Meet once a month for the first six months.
    - Sharing company culture and values with the new hire.
    - Doing some work tasks together to help the new hire understand work flow and process.
    - Being an advocate for the new hire if there's a problem with equipment, etc.
    - Helping introduce the new hire to key people.
  - Have the buddy send an introduction to the new hire. Follow [this link](#) for a template to get started. Or find the Mentor Introduction Email to New Hire at the end of this document.

## COMPLETE BEFORE DAY 1: Prepare the Physical Environment

Done

OBJECTIVE: Set up the new employee's desk or workspace.

Instructions: Get the following items set up before Day 1:

- Desk
- Chair
- Paper/pens/supplies
- Phone
- Whiteboard/pens
- Business cards
- Optional: welcome basket with company mug, snacks, or bottle of water.

## COMPLETE BEFORE DAY 1: Set Up Computer and Other Equipment

Done

OBJECTIVE: Have any key equipment ready for your new employee to log in.

Instructions: Set up and prepare the accounts for the following:

- Computer/laptop
- Smartphone (if one is issued)
- Tablet computer
- Scanner or other handheld

## COMPLETE BEFORE DAY 1: Set Up Security and Access

Done

**OBJECTIVE:** Get security devices ready for your new employee to get started.

**Instructions:** Have necessary starter passwords and key cards ready. If you need to set up temporary badges or passwords, go ahead and have that ready so the employee can take photos and set new passwords right away.

- Passkey
- Office key
- Restroom key
- Security fob
- Security badge

## COMPLETE BEFORE DAY 1: Set Up Company Accounts

Done

**OBJECTIVE:** Have accounts ready for your new employee to log in.

**Instructions:** Have the following accounts set up as much as possible. If your new employee needs to set up these accounts themselves, have instructions for doing so available:

- Email
- Intranet
- Voicemail
- Communications (IM, chat forums)
- Also be sure to add your new employee's email address to any key distribution lists.

## Tasks for Day 1

## Completion Deadline:

The Day 1 activities should be part of the schedule you set up in the preparation tasks. The tasks below provide some additional details for first day interactions.

### COMPLETE ON DAY 1: Learning Where Everything Is

Done

OBJECTIVE: The new hire can find his or her way around.

Instructions: Give the new hire an office tour pointing out key areas:

- Bathrooms
- Break room
- Cafeteria
- Common work spaces/quiet places
- Conference rooms
- Locker rooms
- Main doors
- Fire doors
- Outdoor areas

### COMPLETE ON DAY 1: Orientation with HR

Done

OBJECTIVE: The new hire will complete paperwork, make company benefits selections and discuss company culture.

- Instructions:
- Review the employee handbook
  - Introduce the organizational hierarchy, including colleagues, managers, supervisors, and team members.
  - Review the company's cultural values, mission and reason for doing business.
  - Review company-wide goals for the year/quarter.
  - Discuss the job description and answer questions.
  - Discuss benefits and make selections as necessary.

## COMPLETE ON DAY 1: Manager Meeting

Done

OBJECTIVE: Manager and new hire meet to discuss the job, expectations and initial goals.

Instructions: Over a 30-minute to 1-hour meeting, discuss the following.

- Explanation of the managers' expectations and company culture.
- Discuss the keys to success at this company.
- Review how the manager likes to communicate (email, phone, text).
- Create a list of initial work assignments with a short term focus on learning the basics.
- Identify people who can help with these assignments if needed.
- Set up a follow-up meeting for the end of the first week to review onboarding at that point.

(Follow [this link](#) for a template agenda or find the First Day Manager Meeting Template at the end of this document to get you started).

## COMPLETE ON DAY 1: Tour Electronic Resources

Done

**OBJECTIVE:** Introduce your new hire to electronic resources and tools.

**Instructions:** Take time to briefly introduce any electronic tools your employee will likely use.

- |  |   |
|--|---|
| <input type="checkbox"/> Email         | <input type="checkbox"/> Online forums          |
| <input type="checkbox"/> Intranet      | <input type="checkbox"/> Training software      |
| <input type="checkbox"/> Share drives  | <input type="checkbox"/> Time tracking software |
| <input type="checkbox"/> Cloud storage | <input type="checkbox"/> Scheduling software    |
| <input type="checkbox"/> Wikis         |   |

Share instructions for setting up accounts or learning important software.

**NOTE:** This is an introductory tour. Plan to help your employee learn the specifics of each item over the next several days/weeks.

Agree on times for your new employee to work on setting up accounts or learning software as necessary.

## COMPLETE ON DAY 1: Optional Bonus: Meet with a Senior Leader

Done

**OBJECTIVE:** The new hire learns more about company culture from a senior leader.

**Instructions:** Set up a short meeting with the company CEO or other senior leader. The meeting could be face-to-face or by video call.  
Ask your leadership to focus the discussion on corporate culture and mission.

## COMPLETE ON DAY 1: Optional Bonus: Buddy Meeting

Done

**OBJECTIVE:** The new hire and his or her onboarding buddy meet to get to know each other.

**Instructions:** Set up an informal meeting between the new hire and his or her buddy.

There should be no formal agenda for this “meet and greet.”

## COMPLETE ON DAY 1: Optional Bonus: Social or Quiet Time

Done

**OBJECTIVE:** Provide some down time and relaxation for your new hire.

**Instructions:** Set aside some time for your new employee to socialize with colleagues, such as a coffee break or pizza party.

For introverted new hires, consider setting aside some quiet, alone time to let them recharge and relax rather than social time.

## On-Going Manager and Buddy Meetings

After the initial introductions and set-up, your new hire will be starting tasks and possibly completing job-specific training. But he or she should continue to meet regularly with a manager and/or on-boarding coach to answer questions, smooth out problems, and ensure early success.

### COMPLETE END OF WEEK 1: First Week Wrap-up Manager Meeting

Done

**OBJECTIVE:** Manager and new hire meet to review the first week's onboarding experience.

**Instructions:** Follow [this link](#) for an agenda template for this meeting. Or find the End of First Week Manager Meeting Template at the end of this document.

- Set up a meeting at the end of the first week.
- Review the first week's experience.
- Review whether the first week's goals were met and why or why not.
- Set up objectives for the first 30 days, include learning goals.
- Identify people on the team who can help with the objectives as needed.
- Review work schedule.
- Answer any questions the new hire has.
- Make a note to secure any outstanding resources.
- Schedule or sign up for formal training as needed.

## COMPLETE END OF MONTH 1: First Month Wrap-up Manager Meeting

Done

OBJECTIVE: Manager and new hire meet to review the first month of progress toward objectives and assess the onboarding process.

Instructions: Follow [this link](#) for a template agenda for this meeting. Or find the End of First Month Manager Meeting Template at the end of this document.

- Review "firsts" from this initial 30 days:
  - Mistakes
  - Conflicts
  - Administrative problems
  - Wins
  - Feedback/constructive criticism
  - Recognition
  - Gaps in training/knowledge
  - Completed projects or milestones
- Set up 90 day goals, including learning objectives.
- Identify colleagues who can help with these objectives.
- Schedule any necessary formal training.

## COMPLETE END OF MONTH 1: First Month Buddy Meetings

Done

**OBJECTIVE:** Continue making onboarding progress and resolve any issues that come up.

**Instructions:** Meet once a week for the first month.

Follow [this link](#) below for a template agenda for these meetings. Or find the New Hire Mentor Meeting Template at the end of this document.

Discuss the following:

- Onboarding experience
- Expectations
- Company culture
- Training opportunities

## COMPLETE AFTER 90 DAYS: First 90 Days Manager Wrap-up

Done

**OBJECTIVE:** Manager and new hire meet to review progress and assess the onboarding process.

**Instructions:** At the end of 90 days, manager and new hire schedule a meeting to discuss the following:

- What has worked well in the onboarding process
- What has worked poorly in the onboarding process
- Completion of 90 day goals
- Constructive feedback on new hire's work so far, especially with respect to key learning goals
- Goals for the next evaluation period

Follow [this link](#) for a template agenda for this meeting. Or find the End of First Quarter Manager Meeting Template at the end of this document.

## COMPLETE AFTER 90 DAYS: First 90 Days Buddy Meetings

Done

OBJECTIVE: Continue making onboarding progress and resolve any issues that come up.

Instructions: Meet once a month for the 2<sup>nd</sup> and 3<sup>rd</sup> months of the first quarter. Follow [this link](#) below for a template agenda for these meetings. Or find the New Hire Mentor Meeting Template at the end of this document.

Discuss the following:

- Onboarding experience
- Expectations
- Company culture
- Training opportunities

## COMPLETE AFTER 90 DAYS: First 90 Key Personnel Meetings

Done

OBJECTIVE: Learn about major areas of the business by meeting with key stakeholders over the first three months.

Instructions: Set up meetings with key people in any or all of the following:

- Marketing
- Accounting
- Payroll
- Sales
- Engineering
- Operations
- Manufacturing
- Quality Assurance
- Administration
- Human Resources
- Professional Services
- Consulting

## The Pract.us Tool

At Pract.us, we provide a learning platform designed to quickly and easily bring the social, practical, and formal elements of onboarding together in one place. With the tool, it's a snap to manage the various onboarding tasks over several weeks. You'll significantly lower the management and administrative burden of helping new people adjust to your company. The tool even lets you put new hires in charge of their own onboarding process.

Since you've downloaded this white paper, we're making a special offer to you. You can use the tool pre-populated with the onboarding template and accompanying resource documents, **free of charge for 30 days.**

**START MY FREE TRIAL!**

(Or you can get started by visiting: [app.pract.us/trial-landing-onboard](http://app.pract.us/trial-landing-onboard))

## Templates

### Day 1 Schedule

Date: [\[Date\]](#)

Onboarding  
Contact: [\[Name\(s\)\]](#)

#### Agenda items

9 am	Meet with <a href="#">NAME</a> when you arrive.	Front Lobby
9:15 to 10 am	Take a tour of the building.	
10 am to 11 am	Meet with HR to complete paperwork and benefits selection.	<a href="#">HR Office #</a>
11 am to 12 pm	Meet with your manager to discuss getting started.	<a href="#">Office #</a>
12 pm to 1 pm	Lunch with your new hire mentor <a href="#">NAME</a>	
1 pm to 1:30 pm	Overview of job tools and software in your office with <a href="#">NAME</a> .	<a href="#">Office #</a>
1:30 pm to 2 pm	Meet with <a href="#">CEO</a> .	<a href="#">Office #</a>
2 pm to 2:30 pm	Set up email, voicemail, etc.	
2:30 pm to 3 pm	Team social coffee break	<a href="#">Break room</a>
3 pm to 5 pm	Open for as-needed tasks	

#### Additional information

[Add additional instructions or comments here.](#)

## Welcome Email to New Hire

CC: [Hiring Manager, HR Manager](#)

SUBJECT: Welcome to [Organization](#)

Dear [New Hire](#),

Welcome to [Organization](#)! We're excited for you to join us as a [job title](#).

We're expecting you for new employee orientation on [Month, Day, Year](#) at 9 am. I will meet you in the lobby when you arrive. You'll spend the first day getting set up and meeting your new colleagues.

To help you prepare and make the most of your first day, I've included the following information:

- First day schedule
- Parking information
- Employee handbook
- Employment forms

Please read the handbook and bring the completed forms on your first day.

If you need to contact me before your first day, please call or email me at:

[Phone number](#)

[Email address](#)

Again, welcome to the team. We look forward to working with you.

Best regards,

## New Hire Announcement to Team

CC: [Hiring Manager](#), [HR Manager](#)

SUBJECT: Welcome [Name](#)

Dear Team,

Please welcome [Name](#), a new [job title](#) to our team. [He/She](#) will be responsible for [\[description of key job responsibilities\]](#).

[\[Optional description of new hire's background/qualifications. Example: Alex comes to us from the Allied Corporation, where she was a Senior Project Manager. She's originally from San Francisco, enjoys rock climbing, and regularly volunteers with the Humane Society.\]](#)

[Name's](#) first day is [Day, Month, Year](#). [S/He'll](#) be working in [office/cube #](#).

We'll have a welcome social in the break room at 2:30 that day. Please make a note in your calendar to be there. Also, please make an effort to drop by and introduce yourself.

Sincerely,

## Mentor Intro Email to New Hire

CC: [Hiring Manager, HR Manager](#)

SUBJECT: Welcome to [Organization](#)

Dear [New Hire](#),

Welcome to [Organization](#)! I'm excited to meet you on [Month, Day, Year](#).

I'll be your new employee mentor for your first several weeks on our team. I'll help you get settled, answer any questions you have, and serve as a resource for you. My desk is at [office/cube #](#).

Let's get together for lunch on your first day. I'll meet you at your desk at noon.

If you have any questions before then, please call or email me at:

[Phone number](#)

[Email address](#)

We're looking forward to working with you.

Best regards,

## Day 1 Manager Meeting

Date: [Date]

Location: [Office #]

### Discussion Guide

Discuss the following items at your first meeting with a new employee:

- Review job description and answer any questions.
- Review probationary period policy if there is one.
- Share company history, organizational chart, and mission.
- Share your expectations of your new hire.
  - Work day start time
  - Dress code
  - Breaks/lunch
  - Personal time/vacation
- Let your new hire know how you prefer to communicate (email/phone/text).
- Describe your regular meeting/review schedule and the performance review process.
- Create a short list of initial work assignments to help your new hire learn the company process/culture/work flow, etc.
  - Basic assignments with short term focus
  - People/resources that can help as needed
- Determine what meetings your new hire should attend in the first week.
- Schedule a follow-up meeting at the end of the first week.

## Mentor Meeting

Date: [Date]

Location: [Office #]

### Discussion Guide

These meetings can be casual opportunities to check in with your new colleague and help him or her succeed in the new job. Here are some topics to cover:

- How onboarding is going in the new hire's opinion
- What he or she is working on
- What progress he or she is making toward learning objectives
- Any challenges or questions about the work
- Insights about the company culture
- Insights about typical expectations
- Training or learning opportunities
- People the new hire would like to meet
- Resources that could be useful to the new hire

## End of First Week Manager Meeting

Date: [Date]

Location: [Office #]

### Discussion Guide

The point of this meeting is to check in with your new employee, provide feedback on his or her initial work, and set objectives for the first 30-day period:

- Review first week's experience. Specifically ask for feedback on the onboarding process.
- Check in on first week's job tasks.
- Answer questions and make a note to secure any outstanding resources.
- Provide relevant feedback on initial performance.
- Review work schedule and plan next projects.
- Set up learning objectives for first 30 days.
  - Schedule any necessary training.
  - Identify people or resources who can help with initial learning goals.
- Schedule a follow-up meeting at the end of the first 30 days or sooner.

## End of First Month Manager Meeting

Date: [Date]

Location: [Office #]

### Discussion Guide

Your new hire has been on the job for about a month. This is a good time to review his or her progress so far, help make adjustments, provide performance feedback, and plan learning objectives for the next 60 days. Here are several discussion topics to cover in this meeting.

- Review first month's experience.
  - Onboarding process
  - Mistakes
  - Conflicts
  - Administrative problems
  - Wins
  - Recognition
  - Gaps in training/knowledge
- Review first month's objectives.
  - Were they completed? Why or why not?
  - What resources/support does the employee need to complete these objectives?
- Provide relevant feedback on performance.
- Set up learning objectives for the next 60 days to build skills and take on more challenging work.
  - Schedule any necessary training.
  - Identify people or resources who can help with learning goals.
- Schedule a follow-up meeting at the end of the 60 days or sooner.

## End of First Quarter Manager Meeting

Date: [Date]

Location: [Office #]

### Discussion Guide

Your new hire has been on the job for a full quarter. This is a good time to review his or her progress so far, help make adjustments, provide performance feedback, and plan learning objectives for the next evaluation period. Here are several discussion topics to cover in this meeting.

- Review first quarter's experience. Specifically ask for feedback on the onboarding process.
- Review first quarter objectives.
  - Were they completed? Why or why not?
  - What resources/support does the employee need to complete these objectives?
- Provide relevant feedback on performance.
- Set up learning objectives for the next evaluation period to build skills and take on more challenging work.
  - Schedule any necessary training.
  - Identify people or resources who can help with learning goals.
- Schedule a follow-up meeting at the end of the next evaluation period.

## End Notes

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- <sup>i</sup> Bauer, T. N. (2010) Onboarding New Employees: Maximizing Success. *SHRM Foundation*.
- <sup>ii</sup> Equifax Employment Benchmarks. (2016)
- <sup>iii</sup> Vozza, S. (2016, May 9) What to Do During Your Employees' First Week to Avoid Losing Them.
- <sup>iv</sup> SHRM Customized Human Capital Benchmarking Report. (2016) Society for Human Resource Management.
- <sup>v</sup> The Human Touch Drives Onboarding Success. (2015)
- <sup>vi</sup> Gasparly, S. (2014, March) Jump the Skills Gap with Employee Training. The Hiring Site Blog.
- <sup>vii</sup> Kramer, M. (2015, December 1) How We Dramatically Improved 18F's Onboarding Process in Three Months.
- <sup>viii</sup> Onboarding Done Right: New Hire Engagement is the Key. (2016 March) National Association of Colleges and Employers.
- <sup>ix</sup> Laduke, P. (2016, July 27) Does Your Onboarding Give New Employee the Urge to Flee?
- <sup>x</sup> Half of Workers Experience Onboarding Mishaps, Officeteam Survey Finds. (2015, August, 26) *Staffing Industry Analysts*.
- <sup>xi</sup> Onboarding 101 for Small Business HR. (2014) Bamboo HR, LLC.
- <sup>xii</sup> Minnick, W. et al. (2014, December) Onboarding OSH Professionals: The Role of Mentoring. *Professional Safety Magazine*.
- <sup>xiii</sup> Grillo, M. & Kim, H. K. (2015, Spring) A Strategic Approach to Onboarding Design: Surveys, Materials & Diverse Hires. Cornell University ILR School.
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- <sup>xvi</sup> Gasparly, S. (2014, March) Jump the Skills Gap with Employee Training. The Hiring Site Blog.
- <sup>xvii</sup> Skok, D. A Strong Team Starts at Onboarding. *For Entrepreneurs*.