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Your 30-Day Onboarding Checklist

FOR NEW HIRES

FOREWORD

Hiring and training a new employee is often hard work. Preparing the necessary paperwork, outlining job responsibilities and making sure the employee knows the ins and outs of your company are all important aspects of hiring.

With effective orientation and mainstreaming procedures — also known as employee onboarding — you can create a much smoother transition for everyone involved.

Before we get to why onboarding is important for your business, let's look at some stats.

O.C. Tanner reports that 69% of employees are more likely to stay with their places of employment for at least three years after a great onboarding experience

HBR found that 33% of new hires look for a job within their first six months.

The Wynhurst Group found that 22% of employee turnover happens in the first 45 days of employment.

These are scary stats for a hiring manager. And so we get to our reasons why onboarding can be THE answer to setting up new hires for success.

WHY IS ONBOARDING IMPORTANT?

If done in the right way, the onboarding process is an essential employee engagement tool.

It can improve your:

1 New hire retention rate

2 New hire performance

3 Overall team culture

4 Customer satisfaction

(happy employees = happy customers = an improved bottom line)

So what makes a good onboarding process? Isn't it time-consuming and costly? What is the ROI? All good questions but we'll let the Boston Consulting Group answer the last one first. They found that companies which experience the highest levels of revenue growth and profit margin consistently invested in onboarding processes.

As for the other questions, we've got answers for those too.

Following is a 30 day checklist to onboarding your new staff. It's a handy roadmap for the first four weeks of your new hire's employment. This 30 day checklist includes the week before your new hire's employment as this is a crucial step in ensuring your process is on point.

By the time you reach day 30, you should be confident that your new hire has been given every possible support to help them adapt to their new position. If successful, they will be your newest brand evangelist, working hard to earn your respect while successfully integrating into your company culture.

DAY 1: JOB OFFER

It's important to establish a clear foundation for the new relationship. Take these steps to ensure complete transparency from the outset:

- **Clarify expectations**

  It's just as important to understand what your candidate's expectations are as well as ensuring your candidate has a good grasp of yours. Be frank in terms of what you expect both now and moving forward and hear what they have to say as well.

- **Get clear on team culture**

  Your company culture is the heartbeat of your organisation. Invite your new hire to spend some meet-and-greet time with other team members to let them get a feel for their new colleagues and to give them a glimpse into what makes your team tick.

- **Avoid overselling the role**

  No matter how seemingly clear-cut the role may be—whether it's sales, marketing, or at the executive level—there are bound to be challenges as well as positives that they should be informed of. Make a point of being completely honest about the pros as well as the cons of the job, that way you will be launching from a position of trust and confidence.

- **Make the offer verbally**

  While a follow-up email can often be a good idea, it's important that you make the initial offer verbally. The employer-employee relationship doesn't start the first day on the job, it starts now. By using the conversation to convey your enthusiasm about having them join the team, you have the chance to ease any nerves they might have and instead help them view it as something to look forward to.

DAY 2-7: THE WEEK BEFORE THEY START

- **Introduce your new hire to the rest of the team via phone or email**

  If it has not already been done, introductions to the rest of the team are in order. This way, each team member will be invested in the process and will be prepared to hit the ground running.

- **Ensure all necessary "tools of the trade" are ready**

  If you need to provision a mobile phone, laptop, workstation, printer, logins, or vehicle, make sure these are all ready to go before your new hire arrives for their first day of work.

- **Schedule time with relevant team members and stakeholders**

  Send calendar requests to make sure that your new hire has time booked in with anyone they will be interacting with as part of their role.

  Make sure each person they will be meeting is pre-briefed on the goal of the meeting.

- **Create a schedule**

  Use this guide to list out all the required actions and schedule them in both yours and the new starters calendar for the next 30 days. List this out in a document so that they have a clear plan for their first 30 days.

- **Prepare required reading**

  Make sure you have all required reading material prepared in advance for them to review in their first week, whether it's an internal process manual or relevant books that you feel will help them succeed in their role.

DAY 8: FIRST DAY

Being prepared before your new hire walks in the door is crucial; it will help establish a dynamic that will set the stage for future productivity and accountability.

- **Be prepared**

  The hiring manager should arrive early and at least one hour prior to the new hire's start time. (eg. hiring manager starts 8:30 am, new starter starts 9:30 am).

- **Create structure**

  The new hire's first-day schedule should be highly structured in order to create clarity around the position.

- **Establish clear goals**

  Be as transparent as possible with what is expected of the new hire. Outline tasks, goals, objectives, accountabilities, and KPIs, and lay out expectations with regard to meetings and daily/weekly/monthly/quarterly reporting.

- **Logistics**

  Ensure all office and facility tours are completed as well as introductions.

- **Mentoring**

  Define a mentor/buddy program and set expectations for all three: the mentor, the buddy, and the new recruit with regard to how they will work together.

- **Tools**

  Ensure that all newly provisioned technology is set up and ready to go. Include some easy user guides as a reference – this should include information on your company security policies, and any protocols that concern the use of company-owned equipment and technology.

- **Make them feel welcome**

  There are lots of fun ways to welcome a new hire into the fold. Company swag packs, team lunches, or photos of their new team members with brief but fun bios are a good way to break the ice.

DAY 9-14: FIRST WEEK

- **Get to know the team**

  Getting to know each team member and their unique attributes is a good start. Allocate sufficient time for the new employee to spend time with each team member so that they can get a good idea of what each person brings to the table as well as get to know them on a personal level.

- **Meet the other stakeholders**

  Book time for your new hire to meet with any cross-functional partners. This will allow them to learn how the company ticks from a different department's perspective.

- **Mentor/buddy time**

  To further reinforce the mentor and buddy relationship, schedule the new recruit for a half a day with each one.

- **Policies and procedures**

  Ensure you allow time for them to get up to speed on any company wide policies and procedures including workplace health and safety.

- **Run through the job description**

  You have already explained the overall expectations, but now it's time to run through the specifics of the role in detail. Using the job description as a reference, make sure they are clear on each aspect of the role and how it relates to their overall goals.

- **Give them a quick win**

  Give them a couple of simple tasks to complete so that they can build up their confidence. If they complete them quickly you can give them some more challenging tasks and adjust their workload accordingly.

- **Get them up to speed with internal jargon**

  We all get used to using particular terms internally. It's easy to forget these words mean nothing to new team members. Avoid making new employees feel left out and confused by putting together a term sheet to bring them up to speed. Make sure to review it regularly to ensure new terms are included in the future.

DAY 15-20: SECOND WEEK

Once the first week is over, your new hire should be quite comfortable with their workspace, their colleagues, and the daily routine.

- **Brand induction**

  The second week should be focused on learning more about your products, your brand positioning, value proposition, and discussing the strategies and verbiage that is to be used in overcoming common challenges.

- **Mentor/buddy check in**

  At the end of each week, ensure that they check in with both their buddy and mentor to wrap up any loose ends, answer any questions they may have, and generally weigh in on how things are going.

- **Assign their first project**

  Once they've settled in and completed a few simple tasks during the first week, you can assign a small project for them to work across. This gives them something to focus on and helps with continued on the job learning.

- **Involve them in meetings**

  Include them in any key meetings where they'll gain an understanding of the priorities within the department as well as across the business. While they may not understand everything discussed, it will help build a picture and ensure they feel included.

DAY 21-26: THIRD WEEK

By week three, your new hire should have a good understanding of the tools, systems, and processes that they are expected to use on a daily basis. These could include industry-specific software or platforms, CRM, reporting tools, scheduling software, ordering systems, supply chain and more.

- **Systems expertise**

  If you have not already done so, week three is a good time to test your recruit's proficiency in company tools and systems. If there are no actual instances from which to gain insight into their progress, this can be accomplished by setting up hypothetical scenarios with other team members and working through the steps to resolution. If there are areas that need improvement, partner them up with an experienced team member from whom they can learn.

- **Explain long term goals**

  Every company has long term goals they work towards. You should now take out the time to explain where and how you envision they fit into this bigger picture. Let them know they are involved in these long-term goals to make them feel more secure and help them understand the mission they are working to achieve.

DAY 26-30: FOURTH WEEK

Getting to know the customer base is an important step in the onboarding process. By week four, your new hire should be ready to be introduced to the customer-facing side.

- **Shadowing**

  By this stage, the recruit has a good understanding of the company, the brand, its people, and its values, and should be well-versed on the verbiage that best supports it.

- **Role-playing**

  Working with internal high-performers in a role-playing situation will allow the new hire to try out their pitches on a hypothetical (and safe) prospect. They can receive direction, tips, and encouragement to help them sharpen their message further.

- **Feedback**

  Have a formal feedback / coaching structure to help refine their sales pitch based on client interactions and be available to answer any questions.

- **Celebrate success**

  Keep new hires motivated and engaged by celebrating success (no matter how small). It can be as simple as noting early achievements in a group meeting. Recognition of achievements should not be overlooked as it can really set the tone for motivation, engagement and future success. This will go a long way in letting them know they are appreciated and valued.

DAY 30 AND BEYOND

- Structured review process of the success of the onboarding program.

- Consider using NPS score for all new employees to measure effectiveness of onboarding program.

- Actively solicit feedback from new hire on how the process can be improved and any additional steps that can be added to help the process be effective.

In conclusion

If you have planned your onboarding process well, your new hire should be well-established in their new position. By providing them with the support they need at key stages throughout their first 30 days, they will have been able to grow into their position comfortably and without the pain points usually associated with starting a new job. When both sides are happy, everyone prospers.

To find out more on how you can improve your onboarding and hiring processes get in touch with us at Modis,

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