

Onboarding Checklist

Enable Productive
Employees From Day One

Personio



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A Great Start Can Have a Lasting Effect

Did you know?

Only 12% of newly-hired employees think their organisation has a great onboarding process. However, **91% of employees who have experienced effective onboarding feel strongly connected to their work.** The kind of connectedness that drives both productivity and retention.

There's a clear gap between how employees feel about onboarding programs and how effective they have the potential to become. Given that kind of room for improvement, it's a bit overdue that employers put a structured and seamless onboarding process in place.

In this guide, we offer a **checklist for each of the five core onboarding phases** as we see them.

Before the First Day of Work

Quick Tip

Happen to have a company event running before an employee's first day?

Send them an invite (completely optional) so they can meet some of their new colleagues before they start.

Best Practice

At Personio, we created a separate website for new employees with all relevant information (and even an agenda for their first few days).

New colleagues are sent a link a week before they start, so they can learn at their own pace about life at Personio. Your team could do the same using your own internal communications platform.

Try and provide new employees with as much information as possible before they begin. This can help remove stress from the first day of work, while helping them better process new experiences.

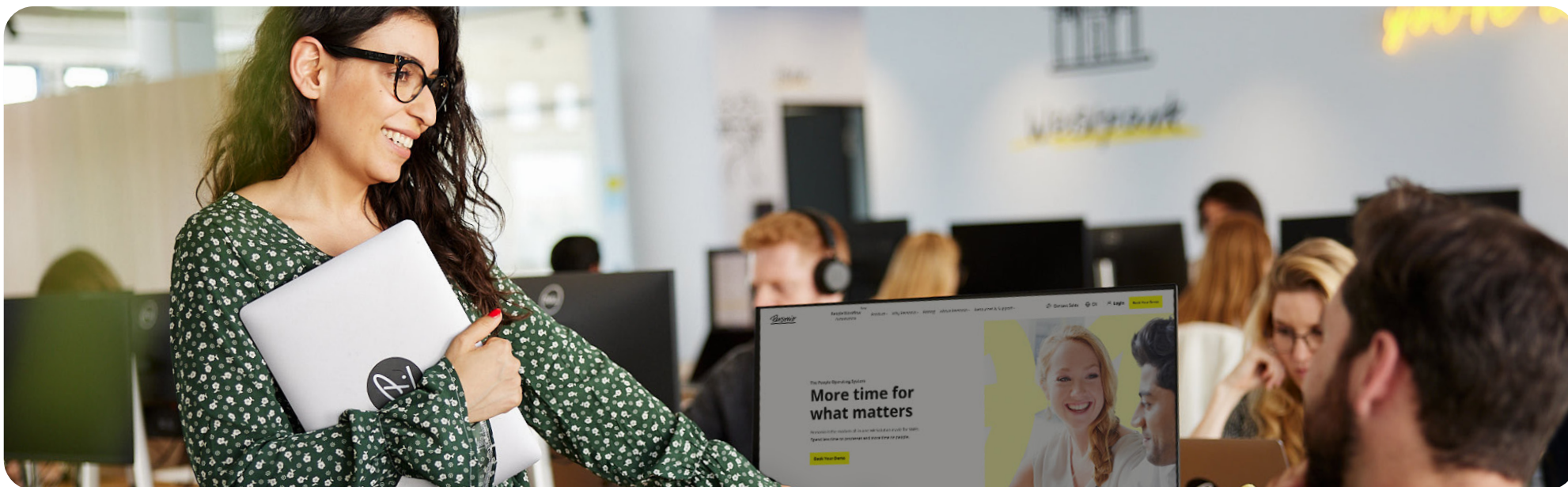
To do's

- **Employment contract.** Have the new employee sign the employment contract and file it in their HR file.
Due Date: _____ Responsible: _____
- **Direct integration.** Maintain occasional contact with your new employee and ask them how they are doing. This promotes employee loyalty even before day one.
Due Date: _____ Responsible: _____
- **Formalities.** Request keys/badges/employee passes for accessing company premises or buildings.
Due Date: _____ Responsible: _____
- **Colleague involvement.** Provide all employees involved in the onboarding process with the information and to-do lists they need well ahead of time.
Due Date: _____ Responsible: _____
- **Workplace.** Ensure the new employee's workplace is fully functional (data access, computer, desk and chair, licenses, etc.)
Due Date: _____ Responsible: _____
- **Information.** Collect and send information concerning formalities and organisational matters to the new employee. The following questions can serve as prompts: How does your company operate? What structures are in place? What will the first few days look like? How is your organisation structured?
Due Date: _____ Responsible: _____



To do's

- **Deadlines.** Invite the new employee to inter-departmental and onboarding meetings.
Due Date: _____ Responsible: _____
- **Virtual.** Determine if your employee will onboard virtually or in a hybrid fashion. Reach out to them see what works best. Make sure they have access to all the equipment they need (whether by sending it directly to them, or through an equipment budget/ reimbursement).
Due Date: _____ Responsible: _____
- **Employee training.** Organise a workplace safety training session and any other relevant trainings.
Due Date: _____ Responsible: _____
- **Responsibilities.** Have the employee's superior inform all team members of any redistribution of responsibilities.
Due Date: _____ Responsible: _____
- **Welcome gift.** Get a small welcome gift for the new employee.
Due Date: _____ Responsible: _____
- **Workplace.** Appoint a colleague as a mentor (or buddy) to help the new employee feel welcome and guide them as a kind of cultural ambassador for your organisation. Especially for new employees onboarding virtually, encourage a cadence (bi-weekly, for example) for coffee breaks and opportunities to "share culture".
Due Date: _____ Responsible: _____



02

During the First Day of Work

To do's

- **Joint lunch.** Have the entire team go to lunch together to get to know each other. Alternatively, a lunch with all new employees is also a good idea.
Due Date: _____ Responsible: _____
- **General onboarding within the department.** General onboarding within the department. Have the manager introduce the new employee to common tools, roles and processes etc. that are specific to the respective department.
Due Date: _____ Responsible: _____

Best Practice

At Personio, onboarding is spread out over two days and is presented in two stages: an official and an individualised onboarding. That entails inducting new colleagues “from the outside in”.

The first day is used to share fundamental information about the company, vision and strategy and everyday workflows.

The second is more focused, designed by respective managers and used to ensure colleagues know how their unique department functions.

During the First Week of Work

To do's

- **Team onboarding.** Have colleagues from the new employee's department give overviews of their fields, tasks and responsibilities.
Due Date: _____ Responsible: _____
- **Product introduction.** Provide the employee with information about the company's products and/or services and their benefits.
Due Date: _____ Responsible: _____
- **Legal matters.** Have the new employee read and sign the standard operating procedures, if applicable.
Due Date: _____ Responsible: _____
- **Technology.** Introduce all tools commonly used within the company and explain them to the new colleague. This can also be done as part of a separate tool induction.
Due Date: _____ Responsible: _____
- **First tasks.** Have the competent manager brief the new employee on their first projects.
Due Date: _____ Responsible: _____
- **Team spirit.** Have colleagues continue to integrate the new employee into their group, for example through shared lunches or coffee breaks.
Due Date: _____ Responsible: _____
- **Mutual expectations.** Have the new colleague's line manager communicate the company's requirements. What will the new employee be expected to do, and what tasks have been assigned to them? How does their role fit in with the company and its vision?
Due Date: _____ Responsible: _____

Keep In Mind

You can't fully onboard someone in only a few days.

New employees deserve to take the first week to find their way around, ask questions and familiarise themselves with how you work.

This early stage is prime time to provide new colleagues with additional information while assigning them their first tasks.

After the First Week of Work



The first week has now come and gone. Now, the foundation for a successful start should have been laid. This is an ideal time to clarify any unanswered questions and obtain some valuable initial feedback about the onboarding process from your new employee.

To do's

- **First impressions.** Seek input from your new employee. What has struck them as positive or negative so far? How do they feel? Is there any information they need?
Due Date: _____ Responsible: _____
- **Initial goals.** Have the manager and employee agree on some early goals (for example, within the first month).
Due Date: _____ Responsible: _____
- **Leave arrangements.** Inform your employee about internal leave policies and brief them about the relevant process.
Due Date: _____ Responsible: _____
- **Working hours.** Inform your new employee about internal regulations on working hours.
Due Date: _____ Responsible: _____
- **Hybrid policy.** Share your hybrid working framework, any out-of-country policies and when employees are expected at work and when working from home is possible.
Due Date: _____ Responsible: _____
- **Build contacts.** Have the manager or HR actively initiate inter-departmental contacts through shared activities such as joint lunches.
Due Date: _____ Responsible: _____

After Four to Eight Weeks

The first two months, for any employee, are critical. That's why your onboarding processes needs to extend beyond weeks and into months. Establishing regular feedback sessions is essential, especially as employees confront new tasks, colleagues, processes and structures.

To do's

- **Second impression.** Have the new employee's manager ask them for feedback again. This time, focused on their wellbeing and expertise. What suggestions might they have for improving processes? Has their impression improved or worsened since the first day?
Due Date: _____ Responsible: _____
- **Regular feedback.** Conduct an initial feedback meeting (which will be repeated at regular intervals from then on).
Due Date: _____ Responsible: _____
- **Organise a team event!** This could take the form of bowling, a hike in the great outdoors, or even a casual dinner with the team.
Due Date: _____ Responsible: _____
- **A sounding board.** Have the manager and HR work together to offer feedback on the onboarding process and who they see as key stakeholders in the process.
Due Date: _____ Responsible: _____
- **Development opportunities.** Have the manager and new employee jointly define any development opportunities that may be appropriate.
Due Date: _____ Responsible: _____

Best Practice

Within Personio, you can easily establish and run automated performance cycles.

Performance conversations, even from the beginning, are critical for onboarding employees. Set an early standard while embedding a culture of development within your organisation. Learn more about Performance & Development with Personio [here](#).

Organise A Stellar Start for Every Employee

Prepared onboarding processes

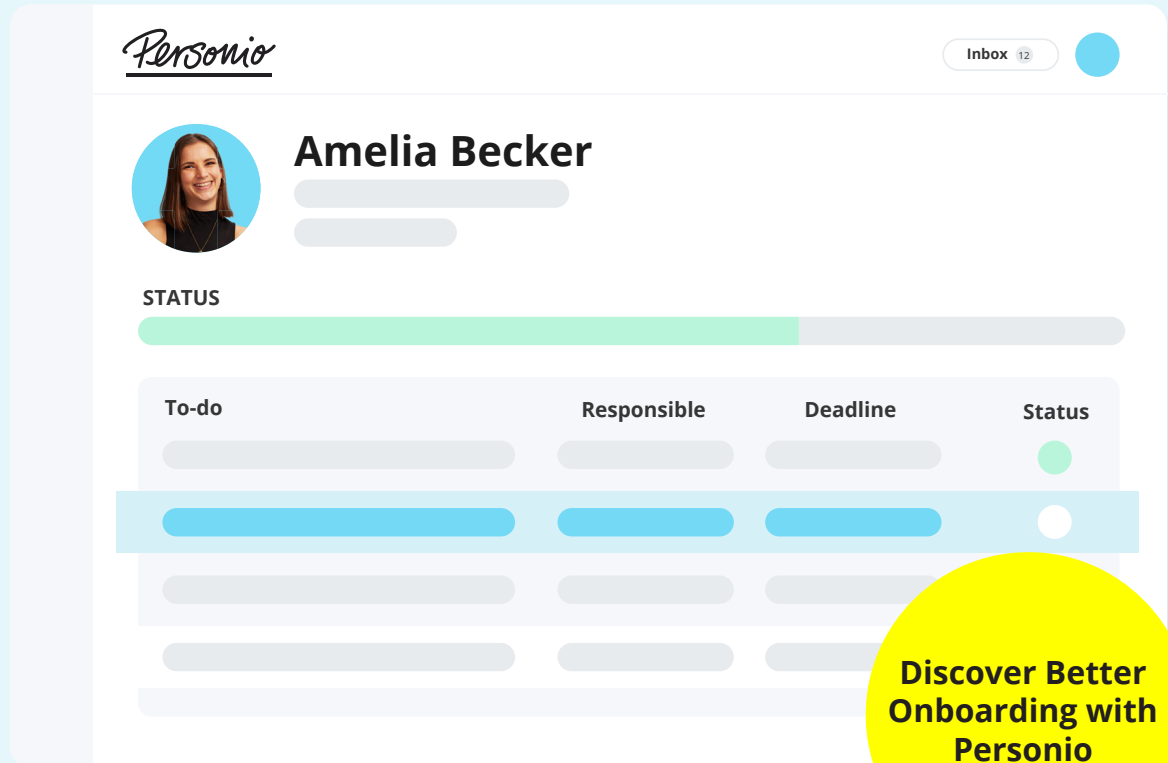
Create any number of customised onboarding templates, per team or department level, that automatically assign tasks to different employees wherever they start.

A wide range of onboarding tasks

Run your onboarding processes more smoothly with employee involvement. Automatically send welcome emails or make important documents available for download as needed.

Automatic reminders

Give each task a due date and Personio will follow up automatically with stakeholders to ensure everything gets done (and no leaves no important questions unanswered).



The screenshot shows the Personio interface for a new employee, Amelia Becker. At the top left is the Personio logo, and at the top right is an 'Inbox 12' notification. Below the logo is a circular profile picture of Amelia Becker and her name. Underneath is a 'STATUS' section with a progress bar that is approximately 30% complete. Below the progress bar is a table with four columns: 'To-do', 'Responsible', 'Deadline', and 'Status'. The table contains several rows of tasks, with the second row highlighted in blue. A yellow circular callout is overlaid on the bottom right of the screenshot, containing the text 'Discover Better Onboarding with Personio' and a right-pointing arrow.

To-do	Responsible	Deadline	Status
			●
			●
			●
			●
			●

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