

ONBOARDING CHECKLIST

Personalized Welcome Letter/Packet - Sent in advance

- Welcome them!
- Agenda - start date/start time and end time; lunch expectations
- Logistics/What to Know - what we wear; what to expect on the first day, what to bring (such as identification); parking information; who's who on the team
- The Neighborhood - restaurants, shops, public transportation, parks/walking, safety
- Benefits information to review - so unrushed, and get input of family
- Glossary of Terms

Be Prepared for their First Day

- Space - offices, cubicles, lockers, furniture all set up
- Supplies/Materials - office supplies, uniforms, equipment
- Technology - email assigned, computer set up, phone number assigned
- Personalization - name plates, business cards

First Day

- Schedule meaningful time with manager
- Give them a tour, including their work site
- Have them meet the team
- Send an email to the organization welcoming them
- Give them company swag (mug, hat, pen, bookmark)

Onboarding Best Practices (several months)

- Let them experience the work early (make sure it's a good fit/provide context for training)
- Create the opportunity for the new employee to contribute early (successfully)
- Provide dazzling training (content/trainer) - <http://programsavvy.com/dazzle-them/>
- Connect them with the "right" people to guide their learning and integration (mentor)
- Share your mission and demonstrate how it is a part of their work
- Share and manage to goals and milestones
- Give them time to master the work
- Ask for and care about their feedback
- Give them meaningful feedback
- Provide opportunity to develop meaningful relationships
- Provide time with manager

Need help designing your onboarding process? Program Savvy can help!