

Onboarding Milestones

Your checklist to ensure smooth sailing for your new hires during their first year

TALMUNDO

Employee Onboarding Made Simple

Before They Start

Pre-Boarding: Calm Their Fears & Keep Them Excited

What happens before anything happens? A lot can actually. Use this checklist to ensure you haven't forgotten any details. Make a positive impact and answer your employees' questions before they even ask.

Essential Agenda

- Contracts and paperwork signed
- Non-disclosure agreement read and signed
- Payroll documentation and processes explained
- Visas, passport details and eligibility to work confirmed (if applicable)
- Vacations and sick day policy explained
- Insurance, financial benefits, pension schemes and relocation support outlined
- Email and IT access requested and ready
- Company dress code explained
- Work station arranged
- Contact details for their first point of contact on Day 1 sent to new hire
- Login credentials for any company services or software requested and ready: e.g. CRMs, Intranet, Intercom and any other applicable systems

Strategy Star Extras

- Introduce the new hire to the team before they start
- Have the team welcome the new hire
- Explain the company's mission and culture
- Share stories of your organization's founding and goals
- Connect the new hire with a mentor and/or mentees
- Share an office plan beforehand - bonus points for a 3D video tour!
- Book intro meetings for the new hire with management or other key people
- Send a birthday or other holiday greeting before they start (if one happens during that time)
- Send the new hire a company "ambassador pack" with their business cards or other brand material to share with their own network

Day 1

Day One: The Wow Factor

Not only does the first day on the job set the tone for your employees' new chapter in life, but it will also either confirm their worst fears or reassure them about their decision to join your company. So plan this day well and make it count!

Essential Agenda

- Arrange for a welcome note/sign/balloon and company swag at their desk
- Notify the whole department, division (or company even) so they know a new employee is joining the team today... and don't forget the receptionist!
- Assign a buddy for the day to show your new hire around. That way they're sure to have a lunch companion too!
- Provide your new hire with access & login details for all systems and who the point of contact is for each in case of questions
- Double-check that all pre-arranged meetings are still on track
- Provide a cheat-sheet of internal extensions or other internal contact information for all team members – bonus if it has everyone's photos too!

Strategy Star Extras

- Combine and align orientation activities with the first project to be tackled
- No paperwork on the first day! If pre-boarding is done right, the paper bits should all be out of the way by now

Week 1

Week One: Team Spirit

Your new hire should feel a little more settled in their new role after a few days, so now it's time to ramp up the friend factor by making sure they keep meeting new colleagues in an informal setting to strengthen the human connection. Have a whole group of newbies coming in? Schedule a company breakfast, lunch or after-work drinks for the whole group.

The social factor aside, by now your new hire might have some extra requests they didn't know before but are dying to ask. Help them out by preparing an updated directory of go-to resources and contacts.

Some key contacts:

- IT support
- HR-go-to contact
- Administrative support
- Department supervisors
- Learning coordinators
- Their boss and their boss's boss
- Their mentor/mentee

Essential Agenda

- Double check that all new hire paperwork is correctly signed and received. We suggest this be a check-in on Day 2
- Double check that they have received all company devices, badges, company car, or other essential tools, and that all are set up and working correctly. We suggest this be a check-in no later than Day 3
- Manager should have a first conversation with his/her new hire to set personal goals and performance objectives for the first month. We suggest this happen no later than Day 3

Strategy Star Extras

- Combine and align orientation activities with the first project to be tackled
- No paperwork on the first day! If pre-boarding is done right, the paper bits should all be out of the way by then

Month 1

First Month: All About the Business

With their first projects well under way, the first month milestone is the perfect time to make sure your new hire's experience only keeps getting better and is closely tied to your business goals. Organize two-way feedback sessions with their superiors and team members for the first, out of a series of, informal development and performance pulse checks.

Essential Agenda

- Check in and re-alignment (if needed) of personal objectives
- A brief informal review of the new hire's expectations
- An informal review of the manager & team from the new hire
- Check-up on any housekeeping items that have arisen since Day 1 – make sure all documents and/or tools are finally set up or turned in if not already accomplished
- Make sure relocation, bank accounts and first salary transfers have gone through smoothly

Strategy Star Extras

- Team lunch, after-work drinks or another informal social activity with the team if you haven't organized one yet
- Invite new hires to work for a day or two from another office location (even in another country!) to help them start building up their wider network in the company and let them see how things work in other locations. Don't forget to get their impressions and feedback afterwards!

Month 3

Three Months: The Show Goes On

Your new employee may not seem all that new anymore – they're settled into a working routine, with plenty of friendly colleagues to go for advice to and to grab a meal with. However, their onboarding experience is far from over! To instill further confidence in their career progression and development, it is now time to talk bigger goals and new beginnings.

Essential Agenda

- A comprehensive review of the first milestones, improvements and achievements.
- An employee-to-manager review: looking at project ownership and future goals within the company and development objectives

Strategy Star Extras

- Collect fresh feedback on the onboarding process itself and any ideas they have for continuing improvement of the onboarding experience

Month 6

Half a Year: Great Expectations

With most of the essential onboarding milestones already behind, your not-so-new employee might even be mentoring their own new hires by now. Their journey with your company, however is still in its infancy – new hires should feel like they know the ropes at work, but unaddressed frustrations could be simmering right under the surface if you abandon them now.

Your newest staff has valuable insight to share on the internal processes at your organization, as well as a fresh perspective on your company culture - hear them out!

Essential Agenda

- A conversation concerning personal development objectives for the rest of the year.
- Further pulse-checks making sure your employee progresses under your guidance.
- Address their initial career goals and discuss them within the organization's context.

Strategy Star Extras

- Set up a first senior management conversation - give every employee a chance to speak to the CEO if they'd like to. You never know what innovative ideas or key insights they'll bring forward that would go unnoticed within the corporate hierarchy
- Have new hires shadow another colleague in a related (but not same) job function for a day

Month 12

First Year: Upwards and Onwards

A smooth and eventful first year behind them, your employee is way beyond getting lost in the office or asking for their colleague's contact details. They may live and breathe company culture by now but they have not forgotten their goals and dreams of 'who they wanted to be when they grew up', and neither should their employer. The one-year mark is the right time to look back, praise your staff for their achievements, and help them to continue to shape their path with the company for more wins for all!

Essential Agenda

- Have a conversation concerning personal development objectives for the following year
- Regular informal check-ins to ensure that your employees continue to be engaged and progressing in their role
- Review their initial career goals and discuss how they fit within the organization's context

Strategy Star Extras

- Has your star employee has already been promoted? Time to re-onboard them to their new role and keep growing together!

Want to know if your onboarding process is up to the new hire test?

Take our free [Onboarding Scan](#) to find out, and get a personalized report on your areas for improvement.

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