ONBOARDING BEST PRACTICES

The Importance of a Robust Onboarding Program

Welcoming a new hire goes beyond paperwork and tours. Effective onboarding integrates employees into your organization, equipping them with the skills and knowledge to succeed. Strong onboarding programs lead to higher retention rates, as employees who feel welcomed, supported, and valued are more likely to commit to their career growth with your company.

A robust program fosters relationships and a sense of belonging, boosting retention. Clear expectations from day one help employees understand their roles and set them up for success. First impressions matter. Intentional onboarding shows your commitment to employees and enhances your reputation. Positive experiences shared by new hires can attract top talent.

Effective onboarding requires a year-long commitment from managers, HR, and mentors. Integration into company culture is ongoing, with involvement from various departments helping new employees see their role in the bigger picture. Interaction with different teams allows new hires to observe how others embody your organization's values.

A supportive environment involves providing access to resources and tools, conducting regular check-ins, and establishing clear pathways for career advancement. By creating a welcoming and supportive environment, you set the stage for the long-term success of both your new employees and your company.

The following pages outline a recommended onboarding schedule, spanning from several weeks before a new employee's start date to one year after joining the company. Please tailor this schedule to suit your company's specific needs and roles.

Pre-Onboarding (Prior to new hire arrival) Best Practices

MORE THAN 1 MONTH FROM START		PERFORMED BY *(ADJUST TO YOUR COMPANY)*
Look for opportunities to touch base with the new employee periodically	When an employee's start date is several weeks away, maintaining communication is crucial. While HR can assist, it's vital for managers to engage with new hires personally. This builds relationships, ensures a smooth transition, and fosters early engagement. A proactive approach makes new employees feel welcomed and supported, paving the way for successful integration and long-term satisfaction.	HR and/or Manager

MORE THAN 1 WEEK FROM START		PERFORMED BY *(ADJUST TO YOUR COMPANY)*
Send welcome email	Begins fostering a connection with the employee, builds excitement, provides essential information, and outlines next steps for the first day. This initial contact helps establish a welcoming atmosphere, easing the new employee's transition into the team.	HR and/or Manager
Send the company's Mission/ Core Values/Vision (for a more senior level hire, consider sharing additional information)	Ensures new employee is aligned with the company's Mission/Core Values/Vision. For more senior hires, sending strategic plan documents/resources, industry happenings, project news, KPIs, etc., aligns them with the company's direction.	HR or Manager
Steps for completing background check / drug screen if applicable		HR
Steps for completing payroll profile		HR
Request bio and pictures from new hire		HR or Manager

1 WEEK FROM START		PERFORMED BY *(ADJUST TO YOUR COMPANY)*
Send employee email with schedule of first few days (up to one week) of orientation	As a new employee, this can help reduce anxiety and ensures clarity and preparedness. This organized approach helps new employees know what to expect, easing anxiety and facilitating a smoother onboarding experience.	HR or Manager
Send welcome gift or some type of swag (optional, ship to their home for an added touch-point)	Helps create a warm and positive first impression, reinforcing the company's commitment to valuing its team members (could be company mug or mouse pad, maybe a personal welcome note from President or manager).	HR or Office Admin
Share new hire photo & bio with team	Post on various platforms: Teams/Email/Break Room Slideshow — sets up the team to welcome the new hire when they see them in the office and promotes a sense of welcome and inclusion for the new employee.	HR or Office Admin
Prepare new hire work space/ computer setup		IT or Office Admin
Email account set up (and equipment/software)		IT or Manager

1 WEEK FROM START		PERFORMED BY *(ADJUST TO YOUR COMPANY)*
Book appointments on calendar for the first 2 weeks	Include: • Meetings with applicable team members and peers • Invite to team lunch (day one?) • Block off time for required training • Make time in your schedule to connect with new employee (ideally multiple times throughout first few weeks)	HR and/or Manager
Add or forward all necessary meeting invites		Manager or Office Admin
Share office expectations	Including attire, office space, etc.	HR or Manager
Assign an onboarding buddy and/ or mentor	This is a go-to person for asking what many may think are silly questions — where's the bathroom, what's the best spot for lunch, where are the sticky notes, etc.	Manager

Onboarding (Week One) Best Practices

DAY ONE		PERFORMED BY *(ADJUST TO YOUR COMPANY)*
Verify I-9 documents	If you're unsure if your employer needs to participate in e-verify, **click here**.	HR
Verify employee is set up correctly for payroll purposes	Talk to employee about pay dates and when to expect first payroll.	HR
Review instructions for parking pass or parking (if applicable)		HR
Set employee up for necessary training videos/required training		IT
Fill out necessary paperwork (online or paper as applicable)		HR
Send new-hire motivation questionnaire (share with manager)	As you strive to build a relationship with your new employee, understanding how they like to be recognized and what motivates them enhances their engagement from day one.	HR
Office facilities orientation	Includes safety items, office hours, location of printers/ plotters, office supplies, parking, etc.	HR or Manager
Time with manager and/or mentor	This starts to build an important relationship, establishes who they can go to for questions and guidance, and fosters early relationship-building, facilitating a smoother transition and deeper integration into the team.	Manager and/or Mentor
Workplace tour, meet with team (lunch with team or welcome committee, if feasible)		HR or Senior Leadership

REMAINDER OF WEEK ONE		PERFORMED BY *(ADJUST TO YOUR COMPANY)*
Benefits orientation	Explain when benefits are effective and date paperwork to be completed.	HR
High level review of 401k	Explain when they can begin contributing and details regarding employer match	HR
Review timesheet and tracking billable hour expectations		Manager or Mentor
Review key policies / SOPs / employee handbook		HR
Business cards ordered	Timing dependent upon level of employee.	Office Admin or Marketing
Review any company specific apps		Manager or Office Admin
High level review of wellness programs (if applicable), including any monetary aspects		Office Admin
Discuss focus groups, opportunity for committees (if applicable)		HR or Manager
Manager sit down with employee to discuss expectations of the job & review job description		Manager
Set regular 1:1 meetings to review expectations and provide ongoing support	Ensures clarity and alignment on expectations and priorities, enhancing performance and integration into the team. Clear expectations foster a sense of direction and purpose. Sample questions: 1. What's going well 2. Challenges/items needing support 3. Project/work questions 4. Project/work things manager needs to discuss 5. What questions do you wish someone would ask you right now	Manager
Showcase your company's culture throughout the onboarding process	Highlight core values, share success stories, and involve your new employee in team activities. This instills a sense of belonging and aligns the new employee with your company's culture, promoting engagement and long-term retention.	Everyone
Review acronym list for our company	Especially important for entry-level graduates.	Manager or Mentor
Project management overview	If applicable for PM hires.	Manager or Mentor
Review company's approach to coaching, performance reviews, and goal setting	Provides clarity on professional development processes, aligning the new employee with expectations and growth opportunities within the company.	Manager
Review how compensation reviews are conducted	Provides clarity on professional development processes, aligning the new employee with expectations and growth opportunities within the company.	HR or Manager

First Month of Onboarding Best Practices

MONTH AFTER START		PERFORMED BY *(ADJUST TO YOUR COMPANY)*
Create resume for project proposals	Could be earlier dependent upon role or need.	Marketing
Schedule several check-ins with leadership team members	This provides the new employee with a broader understanding of leadership perspectives, promotes integration into the company, and helps the employee feel valued.	Leadership Team Member
Weekly check-ins to discuss expectations and timelines	Helps ensure alignment and support as new employee acclimates to their role. Addresses questions and tracks progress, contributing to the new employee's success.	Manager
Overview of clients		Manager or Other Leaders
Overview of traditions and celebrations	Familiarizes employee with key cultural practices, fostering a sense of belonging and preparing the new employee to actively participate in and appreciate the company's culture.	Senior Leaders
Overview of strategic plan and office/department goals (sooner for senior level roles)	Ensures the new employee understands the broader objectives and their role within the organization's mission, promoting alignment and strategic contribution.	Manager
Continue to schedule introductions beyond immediate team (and potentially other offices)	Creates a positive work environment and broadens the employee's internal network, enhancing cross-functional collaboration, contributing to a seamless integration into the company.	HR or Manager

Months 2-12 of Onboarding Best Practices

2-12 MONTHS AFTER START		PERFORMED BY *(ADJUST TO YOUR COMPANY)*
Regular weekly check-ins	Provides opportunity for constructive feedback, helping the new employee to understand their strengths and areas for improvement. Also identifies any additional training and helps ensure the new employee receives the necessary support and guidance during their transition.	Manager
Identify any project related meetings that should be happening		Manager
90-day evaluation which could include a goals check-in	Provides an opportunity to review performance and progress, helping to align expectations and support the new employee's development, driving job satisfaction and retention.	Manager (possible HR administration of evaluation)
Set one year goals at around 90 days (timing may vary based upon employee role)	Facilitates long-term planning and growth, aligning the new employee's objectives with organizational priorities	Manager
Check in with employee	Offers support to the employee and addresses any questions or concerns, ensuring a smooth transition and fosters a sense of belonging in the organization.	HR or Upstream Senior Leader
Periodically review employee goals and any focus areas	Ensures consistent alignment with organizational objectives. This ongoing review process supports continuous development and helps identify areas for improvement or additional support. Suggest 3-6 month cadence.	Manager

One Year After Onboarding Best Practices

ONE YEAR LATER		PERFORMED BY *(ADJUST TO YOUR COMPANY)*
Consider pulling new employees together with senior leadership and/or with current team during a lunch or a happy hour	Fosters relationship-building and a sense of community, helping new hires integrate more comfortably into the company culture.	HR, Manager, or Senior Leader
Start a conversation to discuss achievements, set goals for year two, and explore development opportunities going forward	Align with your company's schedule for annual goal setting if applicable. Supports the employee's growth and ensures they remain engaged and aligned with organizational objectives.	Manager
Recognize the employee's one-year anniversary with congratulations	Consider sending personal note to employee, celebration in meeting, post on social media, etc. Shows employees that their contributions and dedication are valued and appreciated, fostering a sense of belonging and committment. Strengthens their connection to the team and company.	HR or Manager

TEMPLATE: WELCOME EMAIL

Please tailor this welcome email to suit your company's specific needs and information.

Subject: Welcome to the Team, [Employee Name]!

Dear (Employee Name),

We want to extend a warm welcome to you as our newest member at (Company Name). We are so excited to have you join us, and we can't wait for you to start making an impact with us!

Your first day is fast approaching and we've put everything in place to help you settle in and feel at home. Here's what you can expect:

    Start Date: (Start Date)
    Location: (Office Address/Remote Details, if applicable)
    First Day Agenda: (Brief overview of what the first day will look like)

We've also set up your work equipment so that you'll have everything you need to get started. If there's anything specific you'd like to know before your first day, or if you have any questions, please don't hesitate to reach out.

We're looking forward to working with you and are confident that you'll make a positive difference here at (Company Name). Again, welcome aboard — we're thrilled to have you as part of the team!

Best regards,
(Your Name)
(Title)
(Company Name)
(Contact Information)

TEMPLATE: QUESTIONNAIRE

Please tailor this motivation questionnaire to suit your company's specific needs.

Questions to Consider Asking

Help us to understand how to manage/motivate you so that you can do your best work at (Enter Company Name) by answering these questions.

• Why did you accept this job?

• Even though you accepted our offer, do you have any concerns about this new job?

• If applicable, why did you leave your previous job(s) in the past (so we can try to avoid similar issues.)

• What are some things I, your manager, can do to help you thrive and feel supported in your role?

• What motivates you to do great work? Categories of motivators include rewards, recognition, challenge, making a difference, control, learning and growth, and open communication.

• Let's work together to ensure your success. Share your preferences based on past experiences to help us manage, recognize, and communicate with you effectively. Your insights are crucial, whether you're drawing from previous managers or if this is your first job out of college. This collaboration allows us to foster an environment where you can thrive.
  1. Manage you
  2. Recognize you
  3. Communicate with you

• Where would you like to be in your career in three (3) years?

• Is there something we have not asked that you think is important for us to know about managing and motivating you?

TEMPLATE: DEVELOPMENT

Please tailor this development questionnaire to suit your company's specific needs.

Development Questions to Consider Asking at 90 Days

- What does success look like for you as you move forward with your career with our company.
  - » This could be a two-sided discussion (what does the supervisor believe this employee's role looks like as well as what the employee thinks).

- Is the job what you expected and/or hoped for, based upon what you have learned and experienced in your role thus far?

Development Questions to Consider Asking Around 1-Year Mark of Employment

- What does success look like for you this upcoming year or beyond a year?
  - » Discuss with the employee what success looks like for them and how they anticipate they may want to grow professionally.
  - » Supervisor discuss what success looks like from a company perspective for the employee's role.

- What new responsibilities would you like to explore this upcoming year?
  - » Supervisor should be ready to address instances where an employee's development goals are incompatible with their role, requiring a broader conversation about alignment with company objectives.

- What kind of work would you like to do more frequently?
  - » Is the job what you expected and/or hoped for, based upon what you have learned and experienced in your role this past year?

- Are there any other parts of the business you would like to learn about?

- Are there any specific tools or software you'd like to learn how to use?

- Are you interested in any conferences or courses?