Onboarding in a Box

Everything you need for a powerful onboarding experience

You never get a second chance to make a first impression.

4% of new hires leave a job after a disastrous first day
22% of turnover occurs within the first 45 days
Costing the company at least **3X** the former employee's salary*

Onboarding is a critical point in the talent lifecycle. A solid program not only bridges the gap between candidate experience and employee experience, it acts as a catalyst for employee satisfaction and retention.

Of course, it's hard to make a powerful first impression with limited resources, budget, and leadership support.

To help you succeed, we've created this onboarding toolkit. From inspiring examples to practical guides, this "Onboarding in a Box" is chock full of essential resources for every stage of your new hire process.

Make the first interactions with new employees count, and become a more productive and successful talent management team.

WHAT'S IN THE BOX?

Click to jump to a chapter.

Some of the resources here are interactive, so click and type to use the tools right away.

Pre-Boarding Package

One of the most important and often overlooked steps is pre-boarding. It's the introduction to the full onboarding experience. Not only does it increase new hires' excitement, but it also fosters a relationship with them before orientation.

So before your new employees step foot into your office, do your homework with the following checklist. From the basics to awesome extras, this list will help you identify every way to make them feel valued and welcome.

Also, don't hesitate to engage with them before orientation. We created a sample email for you to customize and send to your new hires one week before they arrive. It's a great way to communicate how excited you are for them to join, and also prep them for success on day one. It's a plug-and-play template, so fill in the [blanks] with your company information. Don't forget to add your culture and personality.
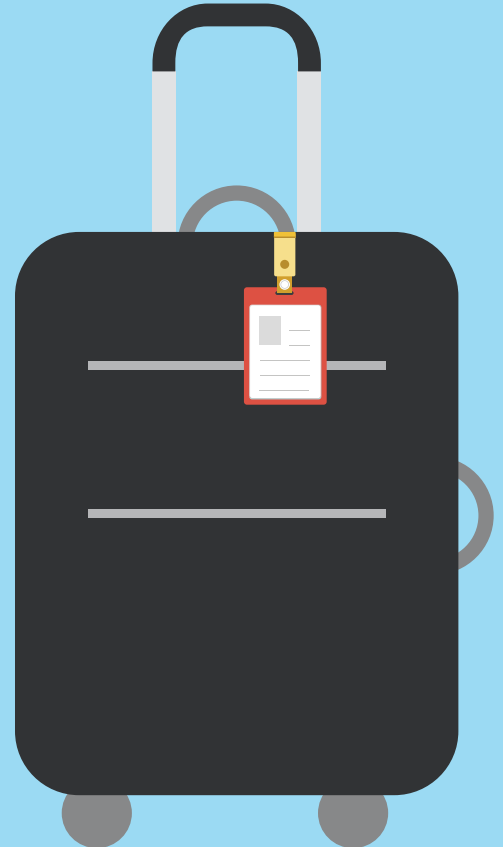
The Ultimate New Hire Checklist

Housekeeping items before the employee's first day:

PEOPLE TO PING

Personnel

Payroll

Benefits

IT

THINGS TO REQUEST

Desk setup from facilities department.

Software/hardware for new hire's specific role.

Email is added to Employee Directory and distribution lists.

Phone and voicemail setup.

NEED TO DO

Gather new hire paperwork from payroll and benefits.

Organize new hire lunch.

Print nametags for new hire orientation.

Schedule badge and employee photos.

Prepare parking permit information/paperwork (if applicable).

Set up timesheet(s) (optional).

Awesome extras that will surprise and delight:

Get welcome card and have recruiting team sign.

Order and place balloons on new hire's desk.

Order breakfast to be delivered to orientation.

Plan icebreaker activities for orientation.

Order company schwag: t-shirts, notebooks, pens, water bottles.

Mail a t-shirt and welcome note to their home address.

Have hiring manager and teammates text or email new hires, expressing their excitement to have them join.

Load USB stick with welcome videos, benefits videos and new hire welcome guide. Send to new hires home 1 week before first day.

Arrange for hiring managers to meet new hire after orientation.

Book Q&A with exec leader for orientation.

Have hiring manager identify employee(s) with similar responsibilities to be a coach/mentor.

New Hire Email Sample

Dear [First Name],

Welcome to [company name]! Please join us for New Hire Orientation on [Weekday, Month Date] where you will learn more about our company, our culture, and discover the many perks of being an employee. Here's everything you need to know for your first day.

NEW HIRE ORIENTATION

[Weekday, Month Date]
9:00 am – 5:00 pm
[company address]
[Google Map link for directions]
Ask for [onboarding facilitator name]

SCHEDULE

9:00 am – 9:30 am	Welcome
9:30 am – 12:00 pm	Exploring [company name]
12:00 pm – 1:00 pm	Lunch & Tour
1:00 pm – 3:00 pm	Perks and Benefits
3:00 pm – 4:30 pm	Equipment & Resources
4:30 pm – 5:00 pm	Next Steps

WHAT TO BRING?

- A drivers license or passport to verify your identification and eligibility to work.
- A voided check or proof of banking account/routing number for direct deposit.
- A big smile! **:D**

PUT A #HASHTAG ON IT!

Ready to show some early [company name] pride?
Share your excitement with the social networks
you love most by using our company hashtag
[#talentbrandhashtag]. We can't wait to see your posts!

GET CONNECTED!

Get answers to your burning questions and meet other new employees by joining our LinkedIn Group for New Hires [link to your LinkedIn Group]. You'll find out why [company name] is one of the best companies to work for!

Once again, congratulations, we are lucky to have you join us! We look forward to meeting you on first day!

- The [company name] team

(Insert a photo of your team)

Try it out!

First Day Experience

"New hire orientation" is so stale. Give your fresh employees an amazing first impression of their new career choice with an interactive and fun first day on the new job.

Start with this sample agenda. This will help you plan an informational yet dynamic experience. Avoid death by PowerPoint with team-building activities, lively videos and full-circle discussions to build relationships and engagement. We know every department wants a piece of new employees on day one, but focus the first day on experiential learning and you'll make a greater impact.

At the end of the day, give them and go over a New Hire Welcome Guide. As new employees get familiar with their role and the company, they will refer to this resource on a daily basis. The sample here will give you an idea of the components you need to include. We suggest making it digital and interactive by linking to videos, your intranet and more.

Go behind the scenes at LinkedIn's onboarding experience on the Talent Blog.

Sample Agenda: First Day

Time	Activity
8 AM	Orientation Set-Up
9 AM	PRESENTATION: Welcome!
	ACTIVITY: Ice Breakers and Networking
10 AM	PRESENTATION & VIDEO: Company Vision and Mission
11 AM	ACTIVITY: Company Culture and Values
	ACTIVITY: Office Tour
Noon	New Hire Lunch
1 PM	DISCUSSION: Exec Q&A
2 PM	PRESENTATIONS: Perks and Benefits
3 PM	ACTIVITY: Tech Equipment & Resources
4 PM	Wrap Up

New Hire Welcome Guide

Welcome, [Employee's Name].

We're thrilled to have you on board! This guide has all the company information you'll need as a new employee. It's interactive, so dive in, click and explore what makes [company name] unique, the resources available to you, and answers to frequently asked questions.

Welcome!

▶

**A Warm Welcome
from [company CEO]**
[insert link to: CEO Welcome Video]

▶

**Company updates
and where we're headed**
[insert link to: recent announcements or All-Hands Video]

Learn
Get to know us a little bit better.

Scroll through [our company's] history
[link to: company history]

See what's top of mind on our company blog
[link to: company blog]

Learn how our we impact our customers
[link to: products/services overview]

Helpful Resources
Be successful during your first few weeks at [company name].

Explore the [company] Intranet
[link to: Intranet]

Join the [company] New Hire LinkedIn Group
[link to: LinkedIn Group]

Find Your Colleagues
[link to: office locations, desk & conference room maps]

Tools of the Trade
[link to: day-to-day applications & tools]

Cure the Tech Bug
[link to: IT Support]

Feeling Perky?
[link to: company perks portal]

Invest in Yourself
[link to: health and financial benefits]

Grow and Develop
[link to: Learning and Development Portal]

FAQ

What's the dress code?
[Company name]'s dress code is business casual – jeans and button-down shirts are fine with us!

Can I order business cards?
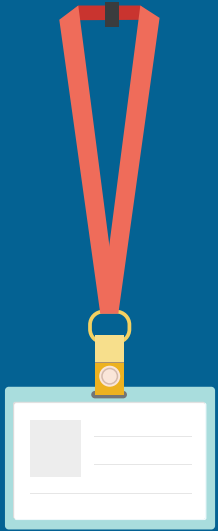Yes, you may order business cards at anytime. Order business cards here. [link to: website]

How can I learn the company lingo?
Just FYI, every company has their jargon, and we're guilty as charged! Decipher acronyms and lingo with this handy cheat sheet, ASAP. [link to: lingo glossary]
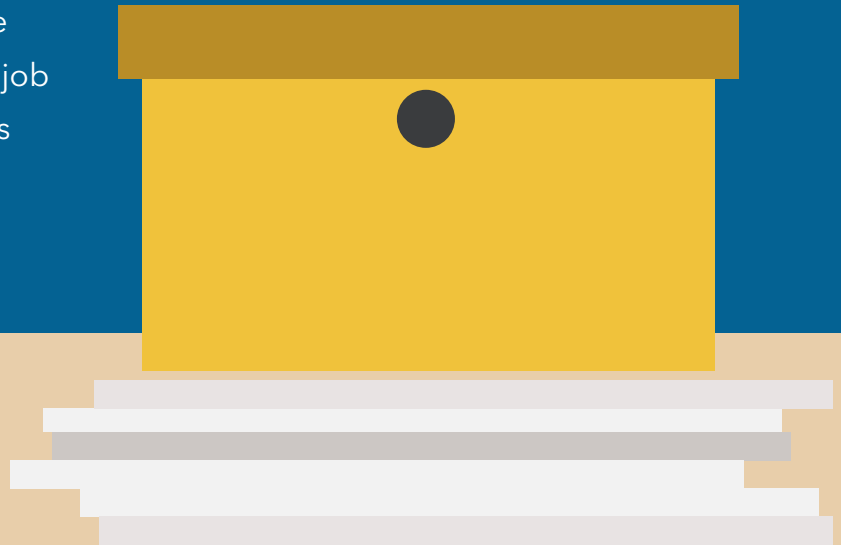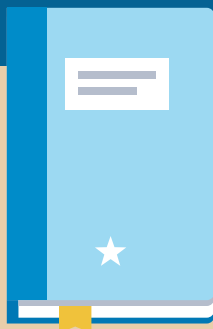
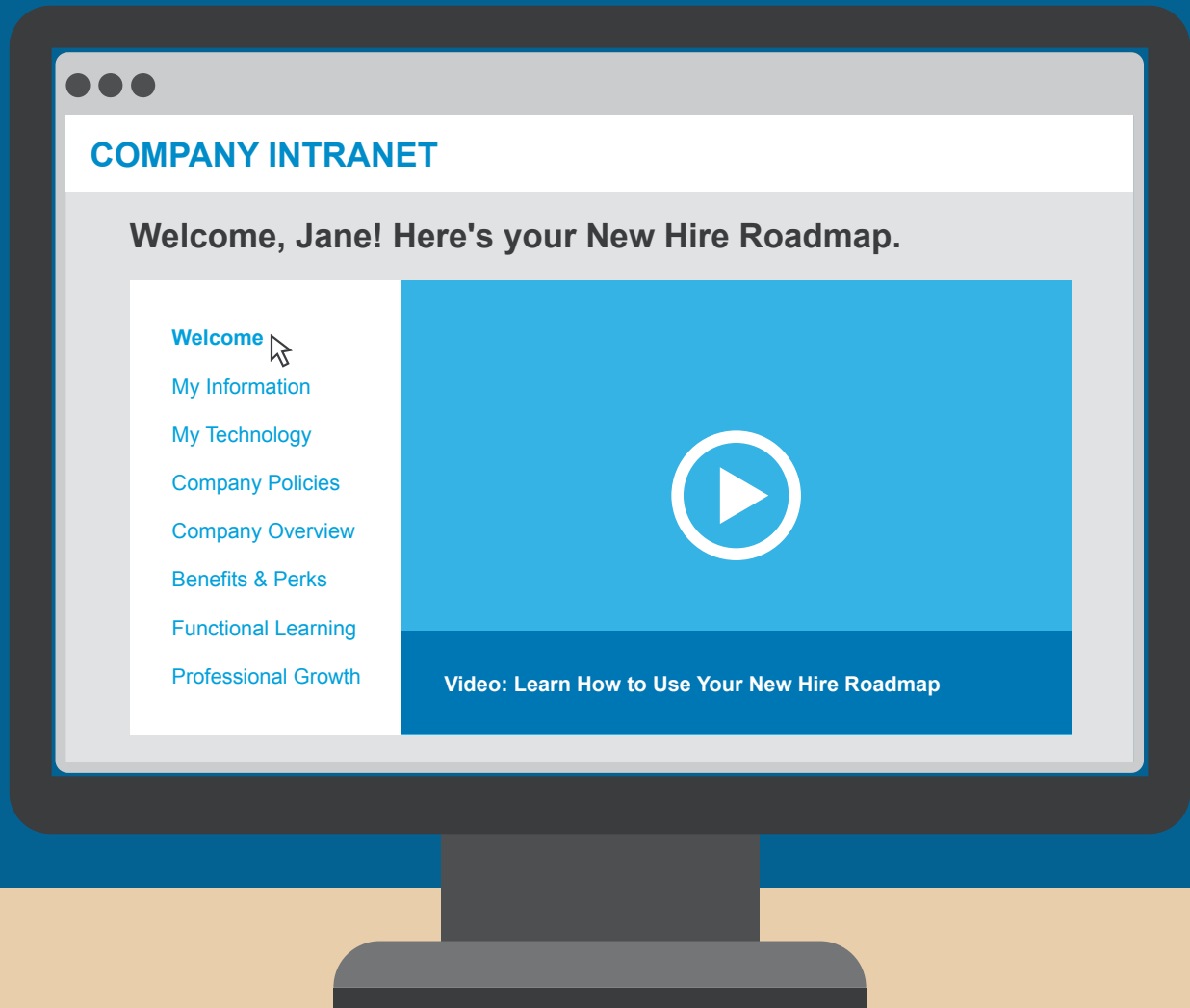Try it out!

First Month Essentials

While "First Day Experience" covered the basics, new employees will need a refresher as well as more information during their first month on the new job. Create a "New Hire Roadmap" on your company intranet and make it a one-stop destination for essential resources. Check out the sample sections from our own roadmap to get your creative juices flowing as you customize your own. Don't have an intranet? Create a sleek hard-copy packet.

Also, you want that handoff to be smooth, so provide the following checklist to the hiring manager. It's everything they need to do to onboard their new employee. Personalize the checklist based on the job function and the manager's working style.

Join
LinkedIn
Group

Sample Intranet Content for New Hires

COMPANY INTRANET

Welcome, Jane! Here's your New Hire Roadmap.

- **Welcome**
- My Information
- My Technology
- Company Policies
- Company Overview
- Benefits & Perks
- Functional Learning
- Professional Growth

▶

Video: Learn How to Use Your New Hire Roadmap

Best Boss Ever Checklist

Housekeeping items for the first two weeks:

SET UP FOR SUCCESS

Review job role and responsibilities.

Discuss manager style & expectations.

Review performance goals.

Schedule meetings with the key "players" working with the new hire.

Overview of common programs & useful websites.

Explain conference room reservations.

Provide employee directory.

Explain desk setup and how the hire can request needed items.

Schedule weekly 1:1s.

Add new hire to regular team meetings.

Confirm that employee has received and reviewed policies and procedures.

MAP THE LAY OF THE LAND

Break rooms

Bathrooms

Conference rooms

Photocopy and fax machines

Supplies and purchasing policies

Transportation & Parking

First aid kit & emergency supplies

Awesome extras that will surprise and delight your new hire:

CREATE A WARM WELCOME

Prepare a week one agenda.

Make lunch plans for their first day.

Have team sign a welcome card.

Give employee company schwag: tshirts, notebooks, thermos, mug, etc.

Send welcome e-mail to staff.

Introduce employee to co-workers.

Introduce to department leads and executive teams.

Take a walking meeting outside the office to learn more about the employee's life outside of work.

Suggest a welcome game of ping pong in break room.

SHOW INVESTMENT

Identify the training and development activities new hire needs in the next 6 months. Sign up for classes.

Suggest influencers to follow on LinkedIn Pulse.

Give new hire 1 month membership to lynda.com.

Identify and set measurable career goals for the next months or years.

> **" *The speed of the boss is the speed of the team.***

– Lee Iacocca

First Quarter Tools

The first 90 days are a critical time in establishing a new employee's success. This is also the point where the new hire's manager takes on more of the onboarding responsibility. It's essential for you to help them train and manage new employees effectively, while making the experience personal and transformative.

To do so, we give you a list of check-in questions for the manager to ask their new hire. This conversation should take place over weekly 1:1s or casual coffee chats. It will create an open working relationship, help trust and help identify how the manager can better help the employee transition to their new role, team and company.

Also, the manager should help the new hire create some measurable goals. Use the following template to set expectations, clearly define what success looks like, and keep new hires highly engaged. Include a combination of quick-wins and long-term goals that will give new employees a sense of accomplishment and lasting impact.

Best Boss Ever Check-In Questions

Questions to ask your new hire over coffee:

1. How's it going? How do you feel in your new job?

2. What are you enjoying most about your role?

3. Is the job/team/company what you expected?

4. Has anything surprised you? If so, what?

5. Has training been helpful? What would you add or change?

6. Do you have all the tools and resources that you need?

7. Do you feel like you have gotten to know your coworkers well?

8. Do you feel out of the loop about anything?

9. What should we provide to new employees that we have missed?

10. What is working/what is not working?

11. Is anything about your role, the team or company still unclear?

12. How can I be a better manager to you?

13. As your manager, what can I do to make your transition easier?

Goal Setting Guide

OBJECTIVES	KEY RESULTS		LOOKBACK
What	Win	When	Status / Comments

Goal #1

What do you want to achieve?	What does success look like?	When do you want to achieve it? MM/DD	Review what was achieved

Goal #2

What do you want to achieve?	What does success look like?	When do you want to achieve it? MM/DD	Review what was achieved

Personal Development Goal

What do you want to achieve?	What does success look like?	When do you want to achieve it? MM/DD	Review what was achieved

> *Setting goals is the first step in turning the invisible into the visible.*

– Tony Robbins

Measure Your Success

New hire and business needs are always changing, so your onboarding process must constantly evolve. Feedback is one of the best ways to measure success and reiterate your program. If you can't measure it, you can't manage it.

Here, you'll find two surveys for you to copy, paste, and customize. One measures the effectiveness of new hire orientation, while the other gauges the new hire's first 30 and/or 90 days in the new role. Both include rating scale and open-ended questions for constructive feedback that you can use.
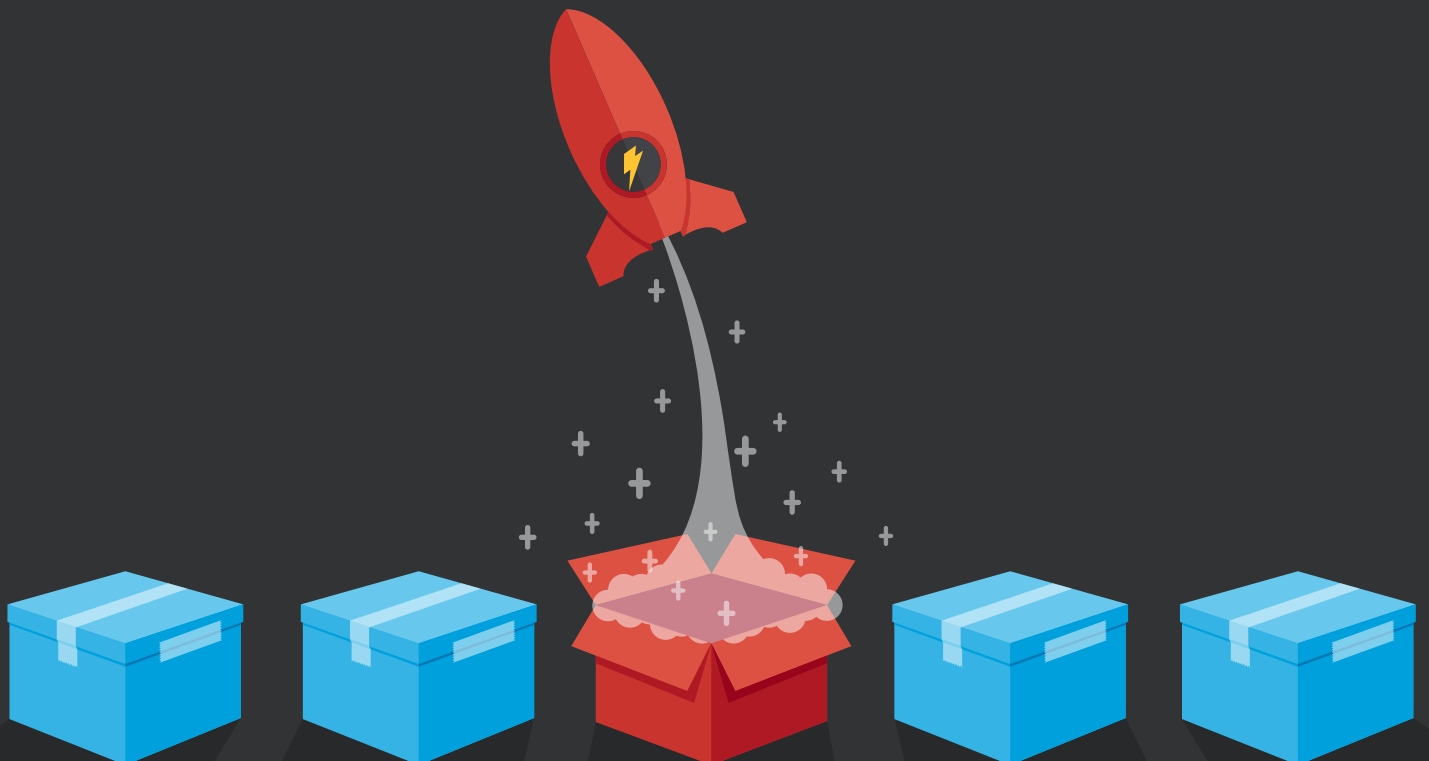
New Hire Orientation Survey

| Location of Orientation | | Date | |

| Department | |

	1 Disagree	2 Somewhat Disagree	3 Neutral	4 Somewhat Agree	5 Agree
I would consider new hire orientation very informative, highly engaging, and useful.					
The length of new hire orientation was effective enough to keep me engaged and retain all of the information.					
I have a better understanding of the company, its leaders, and its different departments.					
I have a good understanding of our company's products/ services.					
I know where to find payroll information.					
I know where to go for medical benefits enrollment.					
I know how to contact IT for technology issues.					
The amount of interactions with other new hires met my expectations.					
The overall orientation experience reflected the culture and values of the company.					
Orientation continued the great experience that began with my recruitment.					
Based on my onboarding experience, I'm likely to recommend this onboarding program to others.					

What was your favorite part of the orientation?	What would you like to see added to the orientation?
What was your least favorite part of the orientation?	Additional comments or thoughts?

30 or 90 Day Follow Up Survey

Your feedback will help us continue to build a strong onboarding experience for future new hires. Your responses are confidential. Thank you!

Rate the effectiveness of the following resources during your first [30 or 90] days:	Didn't Use	Not Effective	Somewhat Effective	Effective	Very Effective
New Hire Intranet Content					
New Hire Roadmap					
New Hire Resource Kit					
Company Intranet					
Manager					
Team					

Please share any success or challenge you had with any of the above resources.

Rate the following statements based on your onboarding experience during your first [30 or 90] days:	Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Agree
I had the resources available to get up to speed quickly.					
My team helped me establish the relationships that will help me be successful in my role.					
My manager worked with me to define expectations for my role.					
I understand how our company's mission and vision, culture and values, and how they drive the way we operate.					
I feel like I made the right decision to join the company.					
Based on my first [30 or 90] days, I'm likely to recommend this onboarding experience to future new hires.					

Please share any success or challenge you had with any of the above statements.

What part of your onboarding experience helped you succeed?	What areas of the onboarding experience could be improved?	Do you have any additional comments or thoughts?

> **"** *It's very important to have a feedback loop, where you're constantly thinking about what you've done and how you could be doing it better.*
>
> – Elon Musk

Parting Thoughts

Now you're ready to make a lasting first impression with a powerful and thoughtful onboarding experience. Once you customize and use the resources in this guide, you'll captivate and engage excited new employees, ultimately retaining talent starting from day one. Remember that not everything is one-size-fits-all, so be sure to personalize and experiment to see what works best for your organization and culture.

Go forth, and onboard!

Would you recommend the *Onboarding in a Box* toolkit to friend or colleague? Let us know.

CONTINUE THE CONVERSATION

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