

A Simplified Best Practices Onboarding Considerations Checklist

Learn what onboarding is all about and use the flowcharts, templates, and checklists to set up an effective, high-retention program.



Company-Related

- Leadership Buy-In
 - Ensuring leadership involvement and support before, during and after onboarding.
- Continuous Improvement
 - Continuously evaluate training to make sure it's current and effective, making changes accordingly.
- Interdepartmental Involvement
 - Involve all stakeholders in the design, development, delivery and review of onboarding.
- Alignment Of business goals
 - business goals first, and develop an onboarding/training framework based on those.
- Mentoring
 - Plan and implement coaching programs or mentor networks for new or transitioning employees.
- Consistency
 - Implementing consistent and ongoing onboarding and training programs. Internally, you need to have a plan that everyone follows and clarify expectations.

Employee-Related

Tailoring

Different generational groups may have different needs that should be kept in mind.

Role Clarity

Make sure that all the expectations are clearly identified and communicated.

Social Integration

Help Support the internal networking and connection needed to do the job well and feel 'at home.

Enculturation

Clearly communicate the mission, vision, and driving values of the organization.

Knowledge Transfer

For new hires and those moving to a new role from other departments.

Ensuring that there is access to coaching, training, a knowledge repository like wikis, and narrative transfer from departing or retiring team mates.

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