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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