

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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