



<<Company name>> // <<Date>>

New Hire Onboarding Plan & Checklists

[Company name] // [Date]

New Hire Onboarding Plan & Checklists



The importance of a structured onboarding process

Onboarding is a key factor in attracting and retaining top talent, boosting productivity, and driving business growth.
<<Company Name>> is developing this structured onboarding program in order to:



ignite employees

Drive employee engagement and business growth



build team

Build a strong foundation for our new employee's success early on



your goal

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another goal

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Onboarding Goals & Employee Lifecycle

How to measure onboarding success

This is a reference slide

The marks of an engaged employee at <<company name>>

1

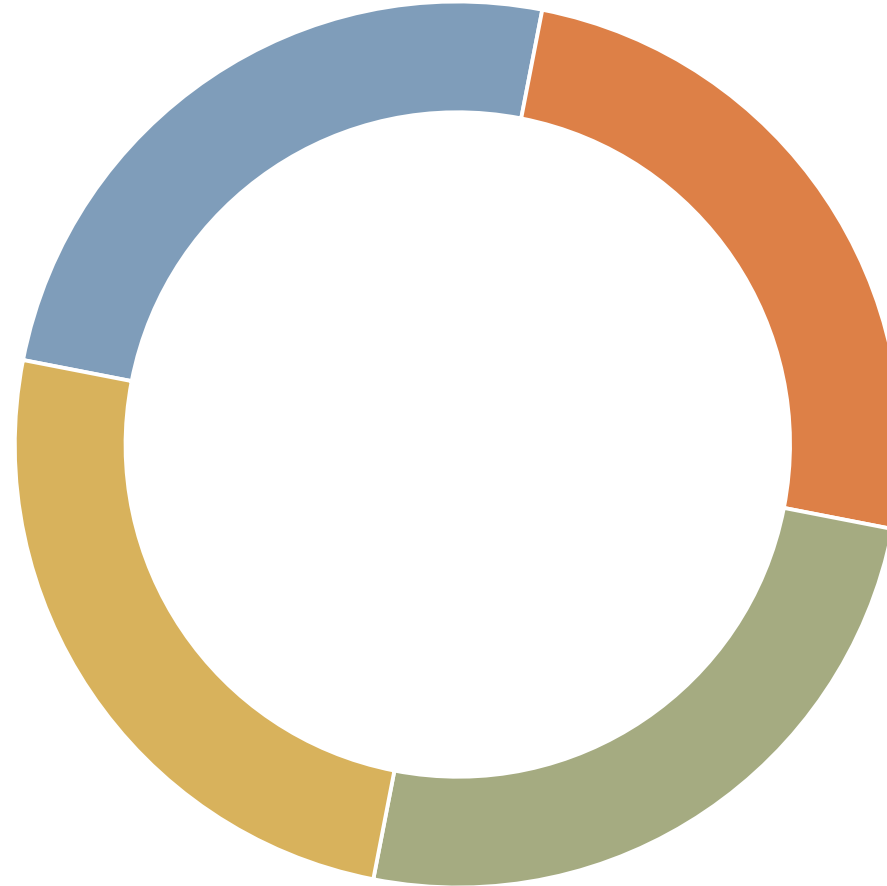
Connection

Engaged employees are **emotionally linked to their jobs** and have a sense of connection to their organizations. This is fostered by a close relationship with a direct manager or supervisor who focuses on building an employee's unique strengths.

2

Commitment

Engaged employees **have a clear sense of commitment to their organization**, and are less likely to be tempted to leave for higher pay elsewhere.



3

Contribution

Engaged employees **contribute autonomously** to the company, and understand where their efforts are best made.

4

Progress

Engaged employees **show progress in their work**, both in what they contribute to the organization and in their own professional development.

How to measure onboarding success

The marks of an engaged employee at <<company name>>

1

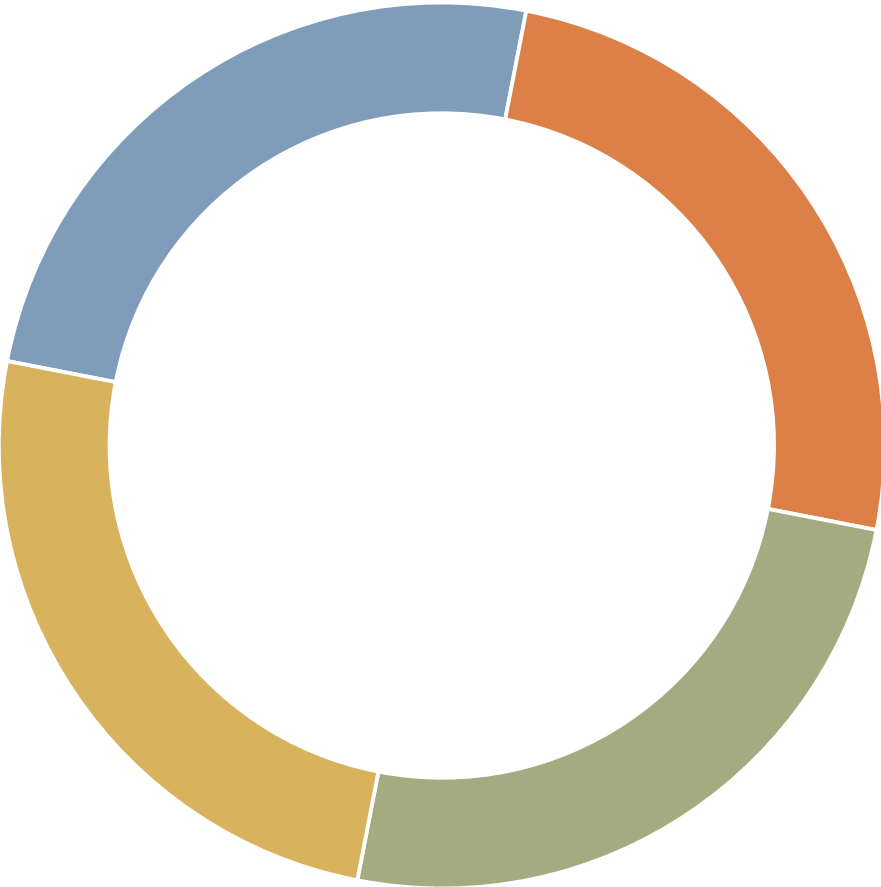
Value 1

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2

Value 2

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3

Value 3

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4

Value 4

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Employee lifecycle template

This is a reference slide

	Recruit / Commit	Pre Onboarding / Day 1	Ramp Up / Productivity	Grow in Role & Transitions	Offboarding / Alumni
Employee Actions	<ul style="list-style-type: none"> Company research Discover employee value prop Interview Is it a good opportunity? 	<ul style="list-style-type: none"> Share the news Attend New Hire Orientation 	<ul style="list-style-type: none"> Get familiar with (tech, facilities, safety) Set clear goals Learn about your org (strategy, long term plans, key players, processes) Development plans 	<ul style="list-style-type: none"> Promotion Learn / Develop Internal transfers Solves problems autonomously 	<ul style="list-style-type: none"> Transition out of the job/ role /company Join Alumni community
Employee Questions	<ul style="list-style-type: none"> Who is ((Your Company))? Is it a good opportunity? Am I a fit? 	<ul style="list-style-type: none"> Who is my community? Who do I work with? What are the styles of work? What tools do I need? How do I ask for help? 	<ul style="list-style-type: none"> Did I finish everything? What's important right now in the company? My team? What's my first assignment? Am I fitting in? 	<ul style="list-style-type: none"> Am I aligned with the company's strategy? Am I being rewarded and recognized? How can I continue growing? 	<ul style="list-style-type: none"> Do I know how to stay connected? I feel like my career has changed me for the better
Expected Emotional State	<ul style="list-style-type: none"> Excited about new opportunity, Slightly nervous for first day 	<ul style="list-style-type: none"> I feel ready for Day 1! I feel excited and prepared. I feel my team is excited to have me. 	<ul style="list-style-type: none"> Super motivated to deliver! Confident 	<ul style="list-style-type: none"> I belong here! I know I matter! The company cares about me, and I for it 	<ul style="list-style-type: none"> Eager to stay in touch and watch where the company goes
Manager Tasks	<ul style="list-style-type: none"> Interview Review employee referrals Explain various programs (career growth, benefits, options, continued education) 	<ul style="list-style-type: none"> Welcome to the team Prepare ramp stages Build onboarding plan 	<ul style="list-style-type: none"> Communicate learning plan Communicate first assignments Set clear goals Set regular check ins 	<ul style="list-style-type: none"> Celebrate wins Give ongoing feedback Conduct periodic performance reviews // compensation reviews Guide through career growth and development 	<ul style="list-style-type: none"> Exit survey Incentivize alumni to keep engaged with brand
Processes, Policies & Tech	<ul style="list-style-type: none"> Candidate CRM ATS LinkedIn 	<ul style="list-style-type: none"> Intranet HRIS, Zenefits Job specific tools (email, slack, etc) 	<ul style="list-style-type: none"> Intranet / communication portals(s) Zenefits Knowledge base management 	<ul style="list-style-type: none"> Policies and procedures Zenefits Learning portal / content Career pathing 	<ul style="list-style-type: none"> Finance systems Alumni groups
Insights	<ul style="list-style-type: none"> Profile of accepts Predictive wins Brand strength / flow 	<ul style="list-style-type: none"> Talent engagement level Onboarding surveys 	<ul style="list-style-type: none"> 90-day check-in survey 	<ul style="list-style-type: none"> Employee voice surveys 	<ul style="list-style-type: none"> Exit surveys

Employee lifecycle template

	Recruit / Commit	Pre Onboarding / Day 1	Ramp Up / Productivity	Grow in Role & Transitions	Offboarding / Alumni
Employee Actions	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text
Employee Questions	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text
Expected Emotional State	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text
Manager Tasks	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text
Processes, Policies & Tech	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text
Insights	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text	<ul style="list-style-type: none">Insert text








Compliance

Compliance Checklist

(This slide has been customized to reflect your inputs)

The forms / tasks to complete

A quick reference to forms & compliance

I-9 Employee Eligibility Verification	 Form I-9
W-4 Employee's Withholding Allowance	 Form W-4
Social Security Number (SSN)	 Employers must obtain any employee's SSN, and hold on record.
Pay & Pay Periods	 Schedule pay periods in accordance with state requirements , and review Fair Labor Standards Act requirements.
Employee Classification: Exempt / Non-Exempt	 Companies with <50 full time employees are not required to submit ACA reporting
Affordable Care Act (ACA) Reporting	 Companies with <50 full time employees are not required to submit ACA reporting
Equal Employment Opportunity (EEO-1)	 Companies with <100 full time employees are not required to submit the EEO-1 form

Compliance Checklist

(Continued)

The forms / tasks to complete

A quick reference to forms & compliance

Add task / form	<div><div></div><div>Add more information here</div></div>
Add task / form	<div><div></div><div>Add more information here</div></div>
Add task / form	<div><div></div><div>Add more information here</div></div>
Add task / form	<div><div></div><div>Add more information here</div></div>
Add task / form	<div><div></div><div>Add more information here</div></div>

Manager Check-ins

Manager's Checklist

Before Day 1

Send new hire:

- ☐ Employee Agreement containing the following
 - ☐ NDA and non-compete statements
 - ☐ Work for hire explanation
 - ☐ Job description and compensation
- ☐ <<list activity>>
- ☐ <<list activity>>

Obtain from new hire:

- ☐ New employee forms & information
 - ☐ I-9 Employee Verification Form ([Form I-9](#))
 - ☐ W-4 ([Form W-4](#))
 - ☐ Employee's Social Security Number (SSN)
- ☐ <<list activity>>
- ☐ <<list activity>>

Manager's Checklist

Before Day 1

- ☐ Send welcome email to new hire, be sure to include
 - ☐ Start date, time, and location
 - ☐ Dress code specifications
 - ☐ Information on parking and where to meet
 - ☐ A list of items to bring on day 1 (ID cards, direct deposit information, etc)
- ☐ Plan first assignments and expectations
- ☐ Send new hire any relevant documents / forms necessary for Day 1
- ☐ Plan employee onboarding schedule 30 // 60 // 90 day goals
- ☐ Set up regular check-ins (weekly, monthly)
- ☐ Prepare work area and supplies
- ☐ Provision appropriate keys, codes, and access tools
- ☐ Set up hardware, software subscriptions, email, etc. necessary for job
- ☐ Provide new hire with employee handbook ([examples here](#))
- ☐ <<list activity>>
- ☐ <<list activity>>

Manager's Checklist

Day 1

- ☐ Meet with your new hire
 - ☐ Go over first day // first week expectations
 - ☐ Go over employee handbook including policies, perks.
 - ☐ Assign a mentor
 - ☐ Review team organization, company structure and where new hire fits in
 - ☐ <<list activity>>

- ☐ Ensure employee has completed forms
 - ☐ I-9 employee verification ([Form I-9](#))
 - ☐ W-4 ([Form W-4](#))
 - ☐ NDA and non-compete
 - ☐ Direct deposit information
 - ☐ Any benefits forms you could not complete before Day 1 (parking, commuter passes, vehicle registration)
 - ☐ <<list activity>>

- ☐ Ensure employee has access to tools
 - ☐ Intranet, doors, codes, locks
 - ☐ Employee ID badges
 - ☐ <<list activity>>

Manager's Checklist

Week 1 Check-in

- ☐ Check-in with new hire
 - ☐ How are they adjusting?
 - ☐ Do they have any questions?
 - ☐ What are their obstacles?
 - ☐ <<list question>>

- ☐ Encourage new hire to further familiarize themselves with product / service
 - ☐ What's unique to your business?
 - ☐ What's your business' unique etiquette and reputation?
 - ☐ How does your product / service stand out from competition
 - ☐ What are the large organizational goals? (1 year, 5 year, 10 year)
 - ☐ <<list task>>

- ☐ Ensure new hire has completed all documentation
 - ☐ Obtain signed "acknowledgement of receipt" of employee handbook
 - ☐ Remind them of their benefits election period
 - ☐ <<list document>>

Manager's Checklist

30-day Check-in

- ☐ Check-in with new hire
 - ☐ What are their insights thus far?
 - ☐ How can you assist them?
 - ☐ Discuss current strengths, strategize how to develop those more
 - ☐ Last reminder about benefits enrollment
 - ☐ <<list activity>>

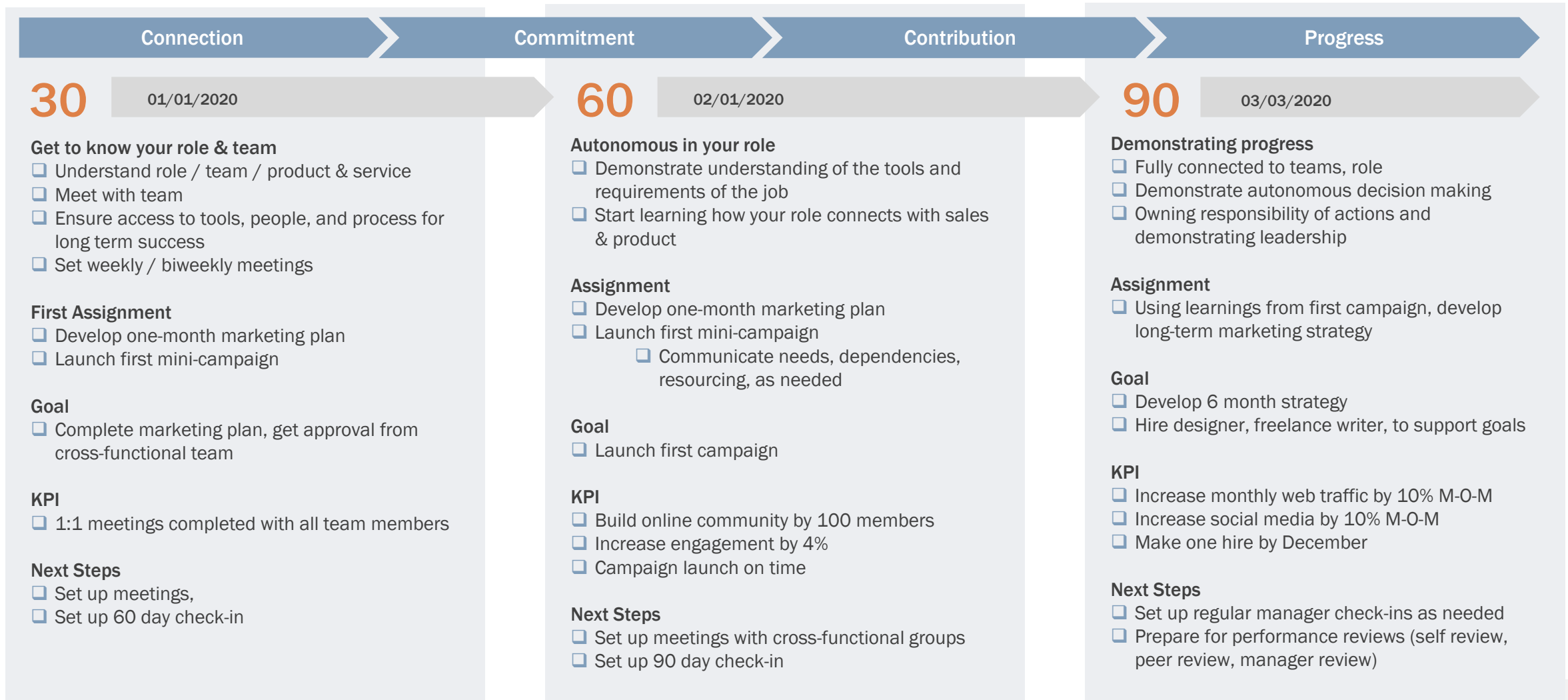
- ☐ Check-in with *your* manager
 - ☐ Evaluate new hire's fit and progress
 - ☐ Strategize how to develop new hire's career success
 - ☐ Review the four areas of an engaged employee, are you encouraging each of those areas? (connection, commitment, contribution, progress)
 - ☐ <<list activity>>

30/60/90 Day Plans

Jean Spencer, Marketing Manager

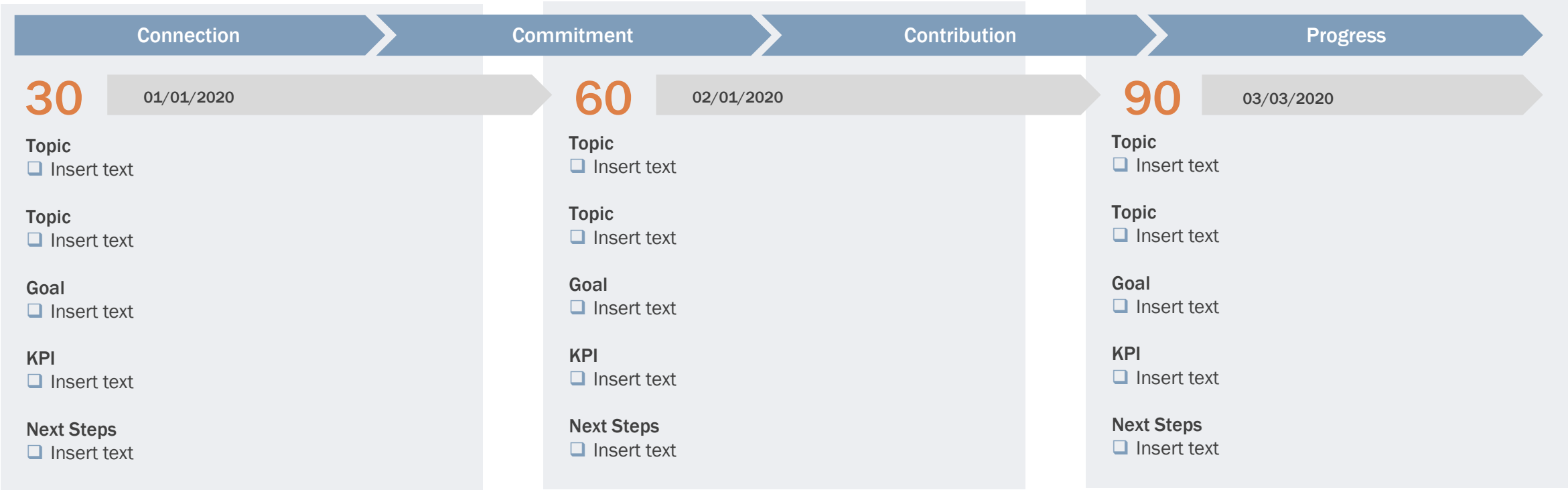
30 // 60 // 90 Day Ramp Plan

This is a reference slide



Employee Name, Title

30 // 60 // 90 Day Ramp Plan



Email Templates

After Offer Email



Dear **[Candidate's name]**,

We're all very excited at the prospect of your joining us here at **[name of company]**. You're going to make an excellent addition to the **[department name]** team, and we can't wait to make it official!

As you're thinking this offer through, I thought I'd share a few unsolicited thoughts. Besides the fact that I think you'd really enjoy your time here, I'm convinced this is the right experience for you at this point in your career.

If there's one thing that my time here at **[company name]** has taught me, it's that the most important thing to do for your career is to embrace whatever catalysts will best unlock your own potential. I really think **[company name]** will be that catalyst for you to improve your professional career.

We're really excited about potentially welcoming you to our team. If you have any additional questions or concerns, don't hesitate to reach out!

All the best,

[Name of sender]

Team Announcement Email



Hi Team,

I'm excited to announce that **[preferred name of new hire]** will be joining our team on **[start date]**. **[Name of new hire]** will sit next to **[name of employee]** and report to **[name of manager]** in the role of **[new hire job title]**. I have added a team lunch to your calendars on **[date]** at **[time]**—I hope you can all be there!

Let's give **[name]** a warm welcome!

[Name of sender]

Welcome New Hire Email



Hey there!

Tomorrow is your first day on the job, and I wanted to be the first to say welcome to **[Company Name]**! We've got a lot in store for you, so here's a quick rundown of all the important info for your first day:

Plan to arrive at **[set time]**. We'll be meeting at **[company name HQ]**, located at **[insert address and room number if applicable]**. It will be easiest to **[insert helpful parking or entrance instructions here]**. The whole team is really looking forward to meeting you!

Best,

[Name of sender]

Zenefits and Onboarding: The Perfect Pairing

As we've seen, onboarding happens before the first day on the job and extends well beyond it. Between paperwork, employee information collection, and integration process, there's a lot to remember to ensure a successful orientation.

Rather than manage all of that yourself, Zenefits makes it possible to streamline and automate the routine tasks associated with onboarding so you can focus on what really matters: your people.

[Read a case study](#)

Here's how Zenefits helps at every stage in the onboarding lifecycle:

Onboarding preparation

Business growth doesn't have to equal more headaches for HR. Zenefits reduces your time spent on hiring and organizes the chaos by allowing you to:

- Easily create, customize, and send job offers in your Zenefits dashboard
- Quickly store and access employee information (job description, offer letter, etc.) and run background checks, all in a few clicks
- Approve or decline manager requests for new hires right through the HRIS single system of record
- Receive alerts when job offers are sent and again when they're signed

First day on the job

Your new hire's first day should be amazing. With Zenefits, important documents and materials are served up right in the dashboard, making it easy for a new employee to find and access important materials like:

- Org charts that help them get to know the team
- Employee handbook to get them familiarized with your company story and policies
- Company vacation and other policies to help them plan

Before the first day

Ready to turn a week's worth of tedious onboarding tasks into just a few hours? Zenefits helps you do just that.

- Get rid of paperwork: documents can be signed digitally and securely, eliminating manual errors
- New hires can enroll in benefits within minutes
- Reduce exposure to compliance penalties with automatic risk alerts
- Verify identity of new employees in a snap—literally. New hires just take a picture of their passports or other IDs and upload it straight to the HRIS.

Compliance

From the Affordable Care Act to I9s, W4s, and back again, making sure you're compliant can be a time-consuming task. With Zenefits, you can put compliance on autopilot in just a few clicks.

- Ensure you're compliant for onboarding, ACA, benefits, and time-off
- Share, store, and manage EEO, I9, W4, agreements in one place
- Find peace of mind knowing your compliance concerns are taken care of

Thank you!

Your name

Your title

your@email.com

Image bank

