A Simple Onboarding Checklist Effective Leaders Can Use to Strengthen Workplace Culture

Effective leaders understand that onboarding is a powerful tool to share and strengthen workplace culture.

But there is so much information out there…

So how do you know that you have taken advantage of the opportunity to set your new teammate up for success and also helped them to understand and appreciate the values, behaviors, skills, and practices that they will be expected to adopt?

You need a simple onboarding checklist that you can refer to and use to help make the process as clear and complete as possible,

And because onboarding someone to your organization is something that really involves much more than just a few days of focus and planning, I have split up the checklist below into three separate lists – before their first day, their first day or two, and after their first two weeks.

And you will want to be sure to implement as many of these ideas as you can, because the quality of your onboarding process has a huge impact on employee retention:

> *"Organizations with strong onboarding processes increase new hire retention by 82% and improve the productivity by 70%,"* and *"employees who attend a structured orientation program are 69% more likely to remain at the company for at least three years." – [Zippia, 2022](#)*

Of course, as an effective leader, you realize that onboarding is not just a responsibility for the HR department!

And while I have shared a list of questions you can use in determining [what to share with a new team member](#), that resource is not nearly as thorough enough to make the onboarding process an exceptional experience that sets up your new team member for success.

Yes, there are non-negotiables like legal paperwork, benefits, and payroll stuff.

But it is helpful to remember that new hire onboarding, whether it is a remote, hybrid, or in-person position, doesn't need to be a boring slog through monotonous emails and signatures and handbooks.
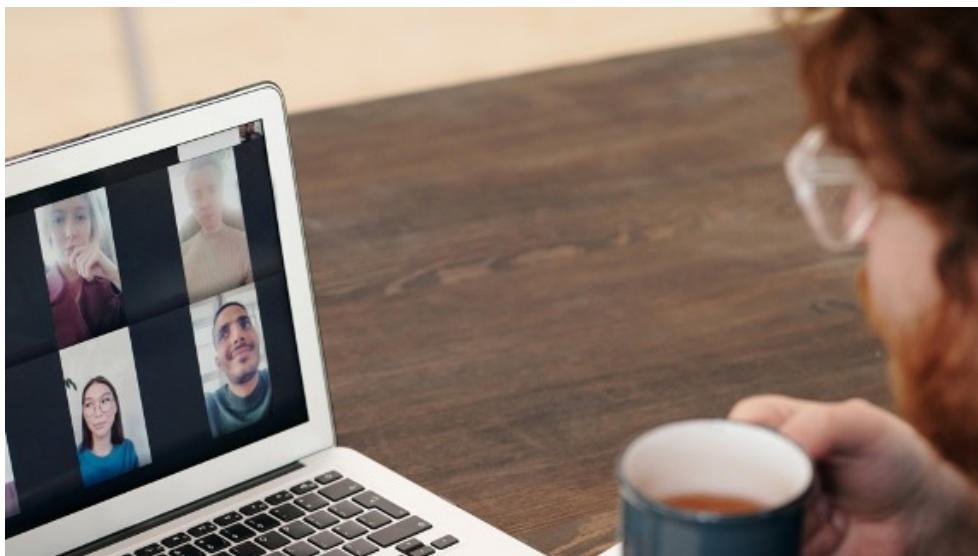
This simple onboarding checklist is a tool you can use to ensure that every new team member is educated about your workplace culture and becomes an enthusiastic part of sustaining it moving forward.

BEFORE THEIR FIRST DAY:

_____ Provide all legal and tax-related documents for signatures (online if possible), including payroll and other HR paperwork

_____ Set up their email address, software licenses, passwords, and online accounts

_____ Send a link to the employee handbook and IT procedures for them to read

_____ Have the new employee fill out a "get to know you" questionnaire that you can keep in your desk and refer to for 1:1 conversations and personalizing rewards.

_____ Send a care package of company goodies – t-shirt, mug, notebook, etc.

_____ Have their immediate manager and at least two other leaders that are connected to their position send a short video welcome message using loom

_____ share a link to a short online course or PDF that shares company mission, vision, values and overview of organizational chart and key names to be familiar with

THEIR FIRST DAY OR TWO:

_____ Send an email to the everyone in the department (or company) introducing the new teammate, including some fun information about their hometown, hobbies, etc.

_____ Create a custom welcome message to appear on all TV monitors throughout the office to make them feel valued and excited when they arrive.

_____ Share a list that clarifies the expected platforms for best communication

_____ Provide a helpful schedule of what they should be doing the first three days, first two weeks, and first 90 days to be successful in their role

_____ Set up personal individual conversations with important people they will need to collaborate or interact with to improve collaboration in their role

_____ Share your list of values, and include a collection of stories that illustrate what those values look like in practice at the company with clients and coworkers.

_____ Host a catered breakfast for all the new hires (if you have more than a couple joining the team (depending on your company size and budget). You can also invite seasoned employees to stop by and get to know the new hires.

____ Partner the new hire with an experienced "buddy" as part of an ongoing mentoring program - you could even pair them with people in other departments

____ Ensure they understand common lingo by sharing a list of common acronyms

____ Hold a virtual Q&A with a group of new hires and one of the company VPs to answer questions about the organization's history, vision, and direction.

AFTER THEIR FIRST TWO WEEKS:

____ Invite new hires to a lunch with your CEO or a few other key executives.

____ Have your first 1:1 meeting to get feedback, ask how they are doing, answer any questions, and clarify their understanding and comfort with the role and responsibilities

____ Create a scavenger hunt throughout the office that encourages new team members to meet people in every department and understand the office layout.

____ Organize a social activity with everyone on the team. This could be a catered lunch or even a half-day corporate team building event that focuses on building connections and strengthening trust and collaboration among all employees.

____ Play a simple get-to-know-you game like "Two Truths and a Dream" at a breakfast or lunch occasion with everyone in the department attending

____ Ask new hires to share a few creative ways you could improve the onboarding experience and present their suggestions whoever oversees onboarding).

Yes, there are things in this onboarding checklist that you are already doing that you should be proud of…

But there are also a number of items that you might be able to add to your process of activities in the future to make the experience much more productive and positive for your new hires.

And if you want to set yourself apart as a truly exceptional workplace culture, you will be sure to involve other leaders and include as many of the ideas as possible – because bad onboarding can lead to undesired turnover and lost productivity.

> *"Only 12% of employees strongly agree that their organization does a great job of onboarding," and "bad onboarding experiences account for 44% of employees lost in the first 6 months of being hired." – Zippia, 2022*

Of course, the onboarding process is never actually over, because an effective leader realizes that it is their job to ALWAYS continue recruiting their talent.

You can do this every month or two with effective 1:1 meeting framework questions.
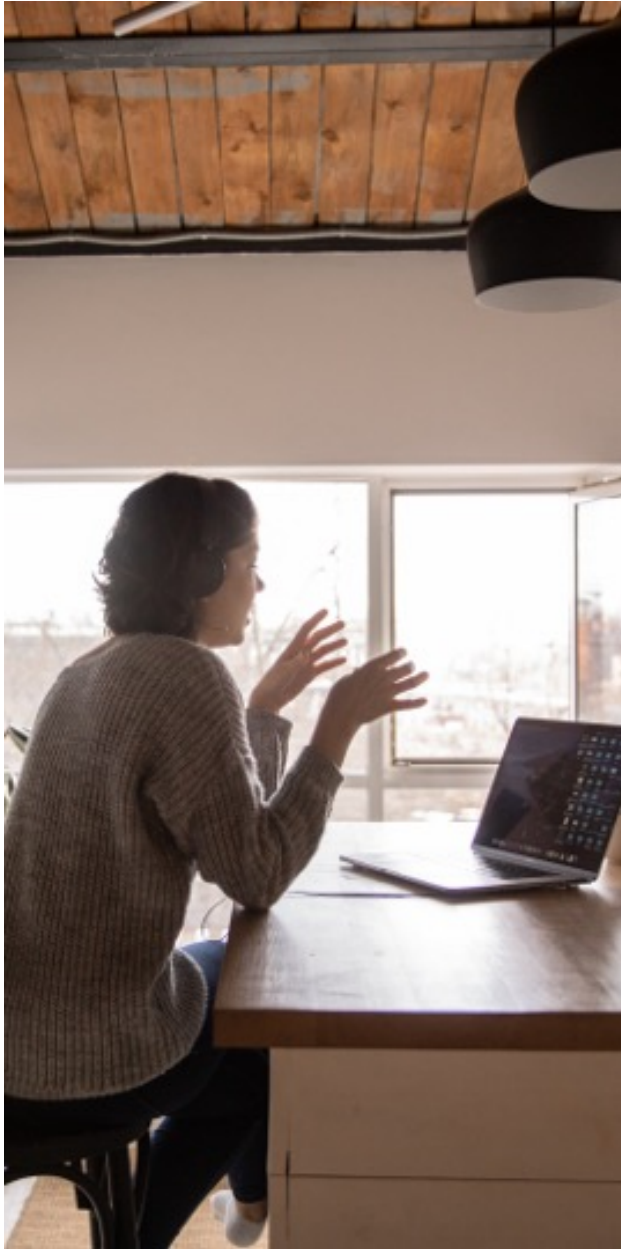
And you can do it by maintaining and strengthening the connection your people have to a compelling common goal (the company mission) and to each other (the people they collaborate with and depend on each day).

Whether your team is remote, hybrid, or in-person, this simple onboarding checklist can be a tremendously helpful tool.

Use it to ensure your new teammates hit the ground running as productive employees.

Effective Leaders use every opportunity they can find to strengthen their culture…

You want them to show up prepared to be a small contributing part of something larger than themselves – and you want them to be as comfortable and connected as possible to help them be successful.

Keep this list handy –

And if ever you need a team building speaker or an executive leadership coach, I hope you will allow me to be a part of the great workplace culture you are creating!

SEAN'S SHORT BIO

Sean Glaze is a speaker and author who works with organizations to develop Effective Leaders and Winning Teammates.

His programs and books have helped clients like Cisco, John Deere, and Emory University to increase team collaboration, boost productivity, and build more positive and profitable workplace cultures.

You can learn more about Sean on his website:
https://greatresultsteambuilding.net/team-building-speaker/

Or connect with him on LinkedIn at:
https://www.linkedin.com/in/seanglaze/