



Onboarding Checklist

You only get one chance to make a first impression



A good start is essential

One in five employment relationships fails during the probation period, making the first few weeks with a company crucial for ensuring that employees get off to a flying start. This in turn is essential for promoting long-term employee loyalty. The following checklist gives HR and other managers guidance in handling this critical initial phase competently.







The 5 core onboarding stages

1. Before the first day of work
2. During the first day of work
3. During the first week of work
4. After the first week of work
5. After four to eight weeks



1. Before the first day of work






Provide new employees with as much information as you can well before they start. This removes stress from the first day of work and helps them process new experiences better.

Task	By	Responsible	
 Employment contract. Have the new employee sign the employment contract and file it in their HR file.	_____	_____	<input type="checkbox"/>
 Direct integration. Maintain occasional contact with your new employee and ask them how they are doing. This promotes employee loyalty even before day one.	_____	_____	<input type="checkbox"/>
Tip: Do you happen to have a company event between the time when the contract is signed and the new employee starts? Why not invite them to make sure they meet some of their new colleagues even before they start.			
 Formalities. Request keys/badges/employee passes for accessing company premises or buildings.	_____	_____	<input type="checkbox"/>
 Colleague involvement. Provide all employees involved in the onboarding process with the information and to-do lists they need well ahead of time.	_____	_____	<input type="checkbox"/>
 Workplace. Ensure the new employee's workplace is fully functional (data access, computer, desk and chair, licenses, etc.)	_____	_____	<input type="checkbox"/>
 Information. Collate and send information about formalities and organizational matters to the new employee. The following questions are particularly interesting: How does the company operate? What structures are there? What will the first few days look like (include an agenda)? How are the teams organized?	_____	_____	<input type="checkbox"/>

HOW PERSONIO DOES IT

Personio has a separate website that combines all of the essential information on the company and its teams in the one place and provides an agenda for the first few days. We send all new colleagues a link to this site a week before they start. A website offers the advantage that it can be edited easily to ensure that it is always up to date, for example using [Google Sites](#).

1. Before the first day of work



Task	By	Responsible	
 Deadlines. Invite the new employee to inter-departmental and onboarding meetings.	_____	_____	<input type="checkbox"/>
 Employee training. Organize a workplace safety training and any other trainings before the employee starts.	_____	_____	<input type="checkbox"/>
 Responsibilities. Have the employee's superior inform all team members of any redistribution of responsibilities.	_____	_____	<input type="checkbox"/>
 Welcome gift. Get a small welcome gift for the new employee.	_____	_____	<input type="checkbox"/>
 Mentor. Appoint a colleague as a mentor to assist the new employee in case of any questions and to support their social integration throughout this early stage.	_____	_____	<input type="checkbox"/>

2. On the first day of work

As a rule, official onboarding should take place either right on the first day in the new job or over the first two days. Provide your new colleague with all of the important information they need about the company, everyday life there and their new team. Keep the first two days short and avoid overloading new employees with too much information.

Task	By	Responsible	
 Introduction. Have colleagues within the same department and/or the new employee's mentor introduce themselves and present the welcome gift.	_____	_____	<input type="checkbox"/>
 Official welcome. Have the managing director welcome all new employees and give an overview of the company's history, culture, goals and vision.	_____	_____	<input type="checkbox"/>
 Introduction to departments. Have the various heads of departments share insights into their teams, roles and responsibilities.	_____	_____	<input type="checkbox"/>
 Formalities. Give the new employee a key/ badge/ employee pass and have them acknowledge receipt by signing the relevant form.	_____	_____	<input type="checkbox"/>
 Company tour. Have the respective HR contact show all new employees around, give an overview of the departments and introduce new employees. The tour should include information about where to find bathrooms, the kitchen, soft drinks and stationery.	_____	_____	<input type="checkbox"/>
 Welcome letter. Have the managing director or manager send an email to existing staff to introduce the new employee.	_____	_____	<input type="checkbox"/>

2. On the first day of work








Task	By	Responsible	
 <p>Joint lunch. Have the entire team go to lunch together to get to know each other. Alternatively, a lunch with all new employees is also a good idea.</p>	_____	_____	<input type="checkbox"/>
 <p>General onboarding within the department. Have the manager introduce the new employee to methods, roles and processes etc. that are specific to the respective department. Use this onboarding presentation as helpful guidance.</p>	_____	_____	<input type="checkbox"/>

HOW PERSONIO DOES IT

Our onboarding is spread out over two days and two stages: an official and an individual part, meaning that we induct new colleagues “from the outside in”. Specifically, this means that the first day is used to share fundamental information about matters such as the company’s history, vision and strategy, and everyday workflows. On the second day, the focus is on individual onboarding, which is designed by the respective managers. During this second part, colleagues from the new employee’s department may, for example, provide their colleague with an overview of their various fields.






3. During the first week of work

Onboarding takes longer than just a few days. New employees take the first week to find their way around, to familiarize themselves with their area of responsibility and new work, and to meet their new colleagues. This early stage is a good time to provide them with additional fundamental information and assign them their first tasks.

Task	By	Responsible	
 Team onboarding. Have colleagues from the new employee's department give overviews of their fields, tasks and responsibilities.	_____	_____	<input type="checkbox"/>
 Product introduction. Provide the employee with information about the company's products and/or services and their benefits.	_____	_____	<input type="checkbox"/>
 Legal matters. Have the new employee read and sign the standard operating procedures, if applicable.	_____	_____	<input type="checkbox"/>
 Technology. Introduce all tools commonly used within the company and explain them to the new colleague. This can also be done as part of a separate tool induction.	_____	_____	<input type="checkbox"/>
 First tasks. Have the competent manager brief the new employee on their first projects.	_____	_____	<input type="checkbox"/>
 Team spirit. Have colleagues continue to integrate the new employee into their group, for example through shared lunches or coffee breaks.	_____	_____	<input type="checkbox"/>
 Mutual expectations. Have the new colleague's line manager communicate the company's requirements. What will the new employee be expected to do, and what tasks have been assigned to them? How does their role fit in with the company and its vision?	_____	_____	<input type="checkbox"/>

4. After the first week of work

The foundation has been laid for the new employee to be productive. This is a good time to clarify any unanswered questions and obtain initial feedback.

Task	By	Responsible	
 First impressions. Seek input from your new employee. What has struck them as positive or negative so far? How do they feel? Is there any information they need?	_____	_____	<input type="checkbox"/>
 Initial goals. Have the manager and employee agree on the goals to be achieved during this early stage, for example in the first month.	_____	_____	<input type="checkbox"/>
 Leave arrangements. Inform your employee about internal leave policies and brief them about the relevant process.	_____	_____	<input type="checkbox"/>
 Working hours/home office. Inform your new employee about internal regulations on working hours and home office options.	_____	_____	<input type="checkbox"/>
 Build contacts. Have the manager or HR actively initiate inter-departmental contacts through shared activities such as joint lunches.	_____	_____	<input type="checkbox"/>

5. After 4-8 weeks

Has the positive impression from the recruitment process been confirmed? The first two months in a new job are critical for employees. Regular mutual feedback is essential as new employees are confronted with new tasks, colleagues and structures.

Task	By	Responsible	
 Second impressions. Have the manager again seek input from the new employee, this time focusing on their well-being and expertise. What suggestions do they have for how to improve issues and processes? Do they have any impressions that have improved or worsened since the last meeting?	_____	_____	<input type="checkbox"/>
 Regular feedback. Conduct an initial feedback meeting (which will be repeated at regular intervals from then on).	_____	_____	<input type="checkbox"/>
 Team events. Organize a team event to further integrate the new employee and promote their emotional loyalty. This could take the form of a bowling session, a walk or a hike, for example.	_____	_____	<input type="checkbox"/>
 A sound basis. Have the manager and HR work together to ensure that expertise is continually shared and expanded.	_____	_____	<input type="checkbox"/>
 Development opportunities. Have the manager and new employee jointly define any development opportunities that may be appropriate.	_____	_____	<input type="checkbox"/>

Want to improve your feedback meetings in a structured way?

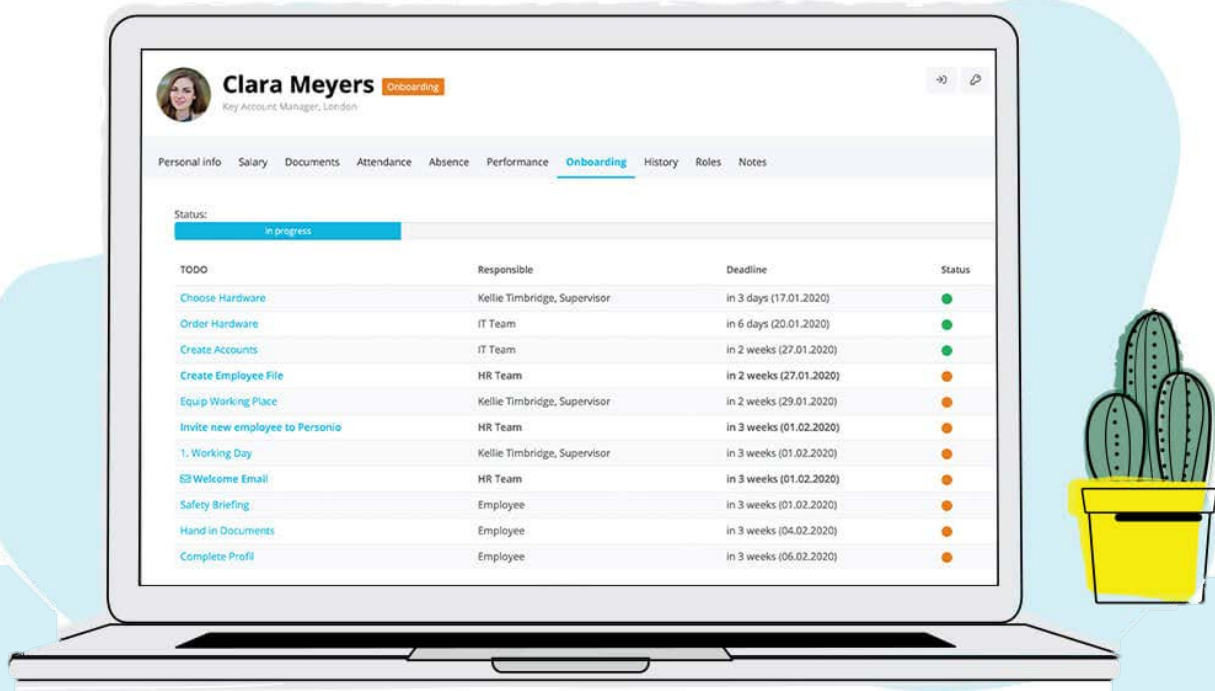
Take the opportunity and go confidently and goal-oriented into your next employee review.



[Download template for more successful performance reviews](#)

Onboarding Checklist

HOW TO ORGANIZE YOUR ONBOARDING IN PERSONIO



Prepared onboarding processes

Create any number of customized onboarding templates to automatically assign different tasks to different employees.



A wide range of onboarding tasks

Have employees initiate onboarding processes themselves, automatically send welcome emails, or make important documents available for download.



Automatic reminders

Assign due dates to tasks. Personio will automatically remind managers and colleagues of outstanding onboarding tasks by email.

[Find out more about onboarding with Personio](#)

Personio

The HR Operating System