

GLOBAL BP SOLUTIONS

ONBOARDING CHECKLISTS

ZIMWORX

THE IMPORTANCE OF A STRUCTURED ONBOARDING PROCESS

Onboarding is a key factor in attracting and retaining top talent, boosting productivity, and driving business growth. Global BP Solutions 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

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"> 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

COMPLIANCE



COMPLIANCE CHECKLIST

The forms / tasks to complete

A quick reference to forms & compliance

Add task / form



Add more information here

Add task / form



Add more information here

Add task / form



Add more information here

Add task / form



Add more information here

Add task / form



Add more information here

MANAGER CHECK-INS



MANAGER CHECK-INS

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

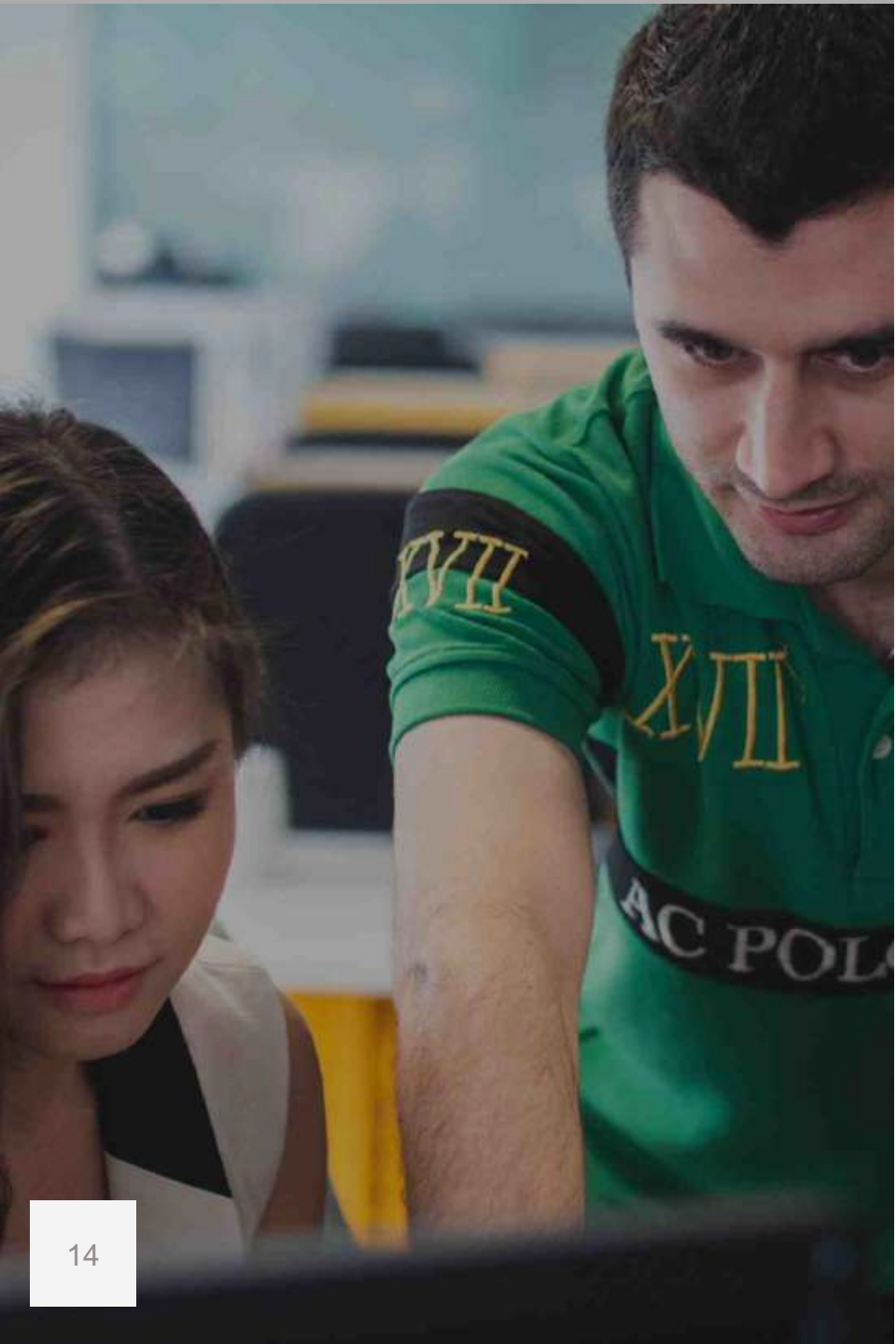
Provision appropriate keys, codes, and access tools

Set up hardware, software subscriptions, email, etc. necessary for job

Provide new hire with employee handbook ([examples here](#))

<<list activity>>

<<list activity>>



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 CHECK-INS

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>>

"edit"



MANAGER CHECK-INS

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



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>>

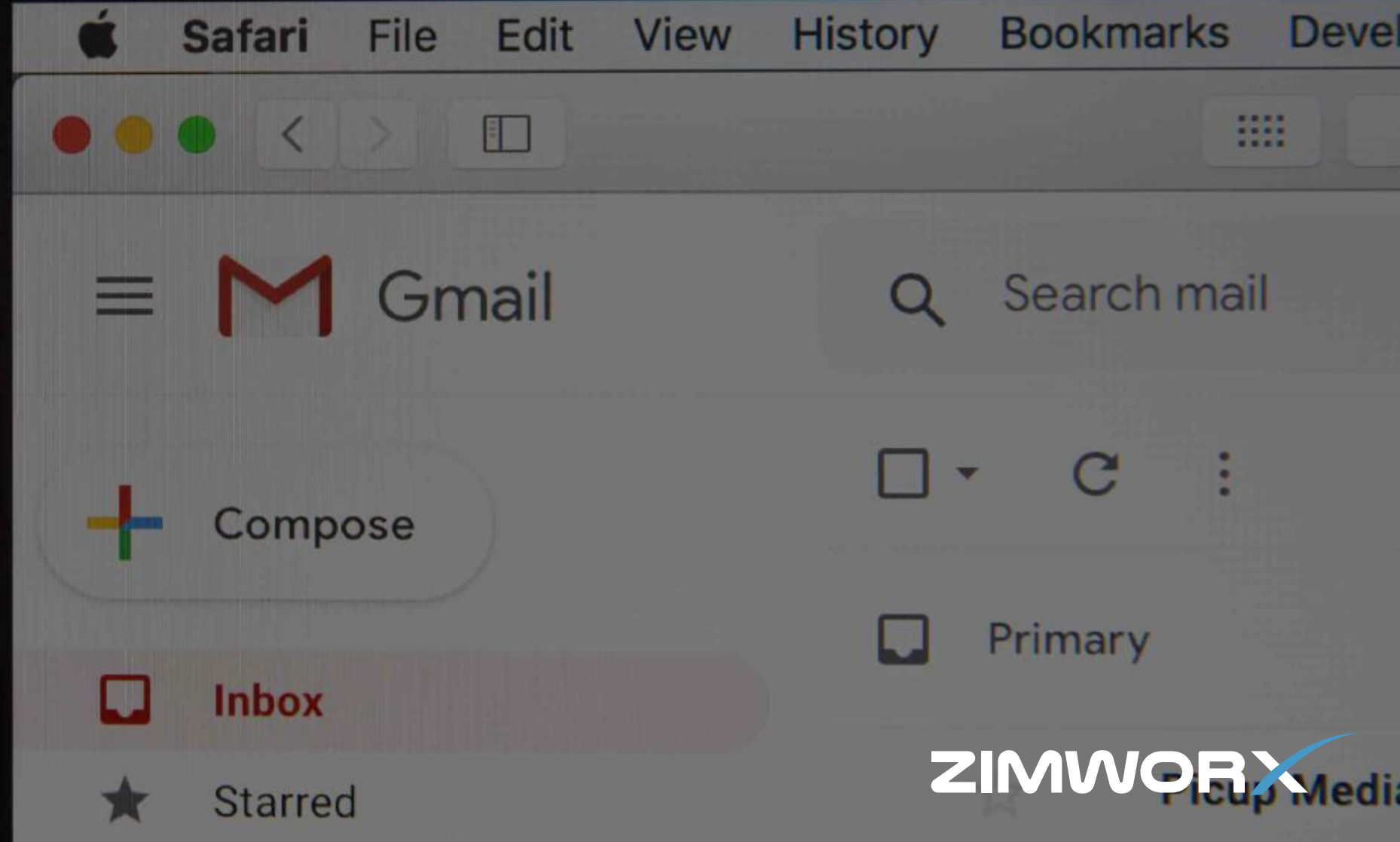
TINASHE MAKOTO, MARKETING LEAD

30 // 60 // 90 Day Ramp Plan

Connection	Commitment	Contribution	Progress
<div>30</div> <div>01/01/2020</div> <div><p>Get to know your role & team</p><ul style="list-style-type: none">Understand role / team / product & serviceMeet with teamEnsure access to tools, people, and process for long term successSet weekly / biweekly meetings<p>First Assignment</p><ul style="list-style-type: none">Develop one-month marketing planLaunch first mini-campaign<p>Goal</p><ul style="list-style-type: none">Complete marketing plan, get approval from cross-functional team<p>KPI</p><ul style="list-style-type: none">1:1 meetings completed with all team members<p>Next Steps</p><ul style="list-style-type: none">Set up meetings,Set up 60 day check-in</div>	<div>60</div> <div>02/01/2020</div> <div><p>Autonomous in your role</p><ul style="list-style-type: none">Demonstrate understanding of the tools and requirements of the jobStart learning how your role connects with sales & product<p>Assignment</p><ul style="list-style-type: none">Develop one-month marketing planLaunch first mini-campaign<ul style="list-style-type: none">Communicate needs, dependencies, resourcing, as needed<p>Goal</p><ul style="list-style-type: none">Launch first campaign<p>KPI</p><ul style="list-style-type: none">Build online community by 100 membersIncrease engagement by 4%Campaign launch on time<p>Next Steps</p><ul style="list-style-type: none">Set up meetings with cross-functional groupsSet up 90 day check-in</div>	<div>90</div> <div>03/03/2020</div> <div><p>Demonstrating progress</p><ul style="list-style-type: none">Fully connected to teams, roleDemonstrate autonomous decision makingOwning responsibility of actions and demonstrating leadership<p>Assignment</p><ul style="list-style-type: none">Using learnings from first campaign, develop long-term marketing strategy<p>Goal</p><ul style="list-style-type: none">Develop 6 month strategyHire designer, freelance writer, to support goals<p>KPI</p><ul style="list-style-type: none">Increase monthly web traffic by 10% M-O-MIncrease social media by 10% M-O-MMake one hire by December<p>Next Steps</p><ul style="list-style-type: none">Set up regular manager check-ins as neededPrepare for performance reviews (self review, peer review, manager review)</div>	

"edit"

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.

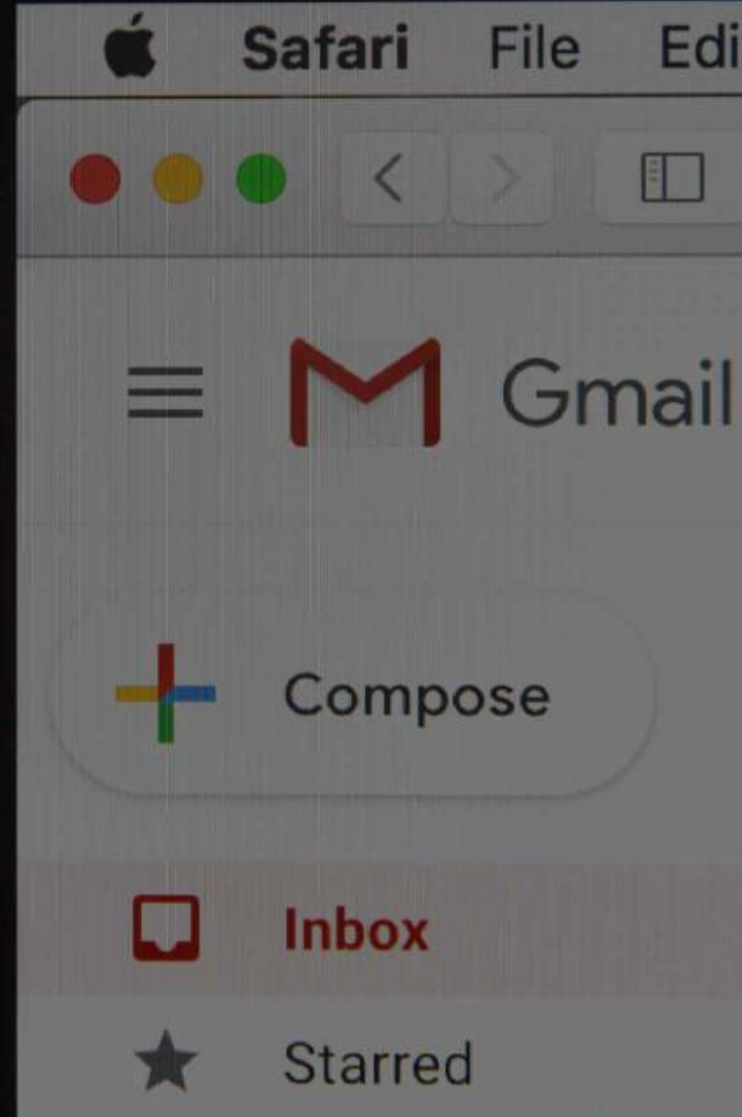
If there's one thing that my time here at [company name] has taught me, it's that the most important thing to do for your career is to embrace whatever catalysts will best unlock your own potential. I really think [company name] will be that catalyst for you to improve your professional career.

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]

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]

TEAM ANNOUNCEMENT EMAIL

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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 jobtitle]. 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]



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THANK YOU

YOU GOT THIS

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