

# Comprehensive Guide on Onboarding Template

The Society for Human Resources confirms that **69% of employees are more likely to stay with a company for at least three years** if they have a positive onboarding experience. Although it may be time-consuming and complicated for human resources departments, proper onboarding is essential and paves the way for long-term success for both the employee and the organization.

Our whitepaper provides a step-by-step guide to help companies organize and streamline the onboarding process. Also, the paper explains **how to integrate new employees** seamlessly into the workplace and retain them with the company for years to come.

## The purpose and goals of proper onboarding

Building an effective team entails more than just finding the best candidates for an organization's positions. One of the most crucial factors in ensuring that recently hired talent becomes productive and contented workers is the process of **onboarding** new employees.



Thus, a proper and effective onboarding process increases employee productivity and engagement. Moreover, having an engaged workforce is crucial for the business's success, employee happiness, and overall well-being, and it all begins with the onboarding template.

## What is an onboarding guide template?

Unfortunately, many employers do not handle the onboarding process correctly. As a result, the company misses important steps, which leads to low employee engagement, poor morale, and a lack of trust in the company.

▶ “You get the employee engagement you deserve. If you don’t engage with them, they won’t engage with you. This is particularly true at important moments of truth starting with how you onboard them,” — says George Bradt, executive onboarding expert. - [BambooHR](#)

According to a Digitate survey, [a negative onboarding experience doubles the likelihood of new hires searching for other jobs in the future.](#)

It is helpful to have an onboarding template to prevent these issues.

## 5 key elements of successful onboarding

An effective onboarding program should be adaptable to the organization's needs, including different roles and new hires. We recommend considering the following recommendations when building a template:

1. **Communicate** the onboarding process and expectations to new hires, including company culture and values.
2. **Provide a structured process and timeline** that new employees can follow at their own pace, taking into account their unique needs and learning styles.
3. **Encourage open communication** between the new employee, their manager, other stakeholders in the organization, and HR, commonly referred to as People Operations, teams, fostering a sense of community and belonging.
4. **Promote employee engagement** with members outside of their immediate team, encouraging cross-functional collaboration, mentorships, and overall growth opportunities.
5. **Continuously measure and improve** the onboarding program's effectiveness, taking into account feedback from new hires and other stakeholders.

## 3 examples of onboarding templates

A comprehensive checklist ensures that necessary steps are taken during the onboarding process. At the same time, it should be easily adjustable to offer some degree of personalization.

In our whitepaper, we provide three free, easily customizable onboarding templates.

- ▶ “Not everyone’s situation is the same, and your onboarding process needs to reflect that.” – Raphaël Moutard, senior engineer at Spendesk ([360Learning](#))



## 1. Remote employee onboarding template

We designed this onboarding template to ensure a smooth and effective integration process for new remote employees. From pre-arrival preparations to vital onboarding tasks and the first annual review, this checklist covers all the crucial steps.

<b>1. Before the new hire's first day</b>
<input type="checkbox"/> Send a welcome email and initial instructions <input type="checkbox"/> Set up necessary accounts (email, communication tools, project management, etc.) <input type="checkbox"/> Provide access to relevant company resources and documents <input type="checkbox"/> Share the company's culture, values, and mission materials <input type="checkbox"/> Assign a buddy or mentor to guide the new hire
<b>2. First day of work</b>
<input type="checkbox"/> Schedule an orientation video call with HR <input type="checkbox"/> Introduce new hires to team members through virtual meetings <input type="checkbox"/> Review company policies, remote work guidelines, and security protocols <input type="checkbox"/> Set up initial training sessions for tools and software <input type="checkbox"/> Clarify roles, responsibilities, and expectations
<b>3. After 30, 60, and 90 days</b>
<input type="checkbox"/> Conduct regular check-ins to ensure a smooth transition <input type="checkbox"/> Provide ongoing training and development opportunities <input type="checkbox"/> Set clear performance goals and expectations <input type="checkbox"/> Encourage participation in team meetings and projects <input type="checkbox"/> Gather feedback from the new hires about their onboarding experience
<b>4. After onboarding completion</b>
<input type="checkbox"/> Conduct a comprehensive review of the onboarding process <input type="checkbox"/> Gather feedback from the new hire and relevant team members <input type="checkbox"/> Address any remaining questions or concerns <input type="checkbox"/> Transition the new hire into regular performance reviews and career development conversations <input type="checkbox"/> Celebrate the successful completion of the onboarding journey

## 2. Executive onboarding template

The executives' onboarding process requires a greater level of attention and customization compared to regular employees. In case an executive does not succeed, the organization's financial consequences could be devastating.

Since executives are often hired to bring about changes and improvements to the company, a tailored onboarding process helps them get started quickly. This [executive onboarding template](#) from Smartsheet breaks down the difference between employee orientation and executive onboarding, emphasizing the complexity of the latter. It also incorporates a full executive's learning path for a successful onboarding process.

### EXECUTIVE ONBOARDING

EMPLOYEE/EXECUTIVE ORIENTATION vs. EXECUTIVE ONBOARDING	
EMPLOYEE/EXECUTIVE ORIENTATION	EXECUTIVE ONBOARDING
ABOUT ORIENTATION	ABOUT ONBOARDING
Orientation involves welcoming a new executive or employee and familiarizing them with the organization. It often includes meetings with supervisors and company leaders, introductions to staff and coworkers, information about the company's background, mission, goals, and culture, and learning policies, standards, and practices. It may also involve enrolling the employee in benefits and incentive programs or providing enrollment information.	Executive onboarding takes orientation a step further. Not only is the executive introduced to management and staff and acquainted with the organization's history, culture, policies, processes, and goals—they are also trained on their specific role. This may include guidance on forming strong working relationships, making key decisions, and/or implementing new ideas. It typically involves meetings with colleagues, subordinates, and/or company leaders, as well as training and informational sessions.
ORIENTATION SNAPSHOT	ONBOARDING SNAPSHOT
Only happens once for new hires.	Is a long-term, ongoing process for new executive hires and internal promotions.
Takes place before or during the employee's first days of work.	Takes place before and during the executive's first days of work and into their first year.
Informs new hires about company operations, policies, and procedures.	Informs executives on the organization's long-term mission, goals, strategies, and needs.
The same information is presented to everyone, regardless of role or skill level.	Offers training and guidance for the executive's specific role.
ORIENTATION: GOALS AND OUTCOMES	ONBOARDING: GOALS AND OUTCOMES
Employees are familiarized with the organization's history, culture, policies, standards, mission, goals, and day-to-day processes.	<i>Short-term (within first few days):</i> Executive has completed orientation, submitted all new hire and enrollment paperwork, and been acquainted with the organization's background and mission. Executive's first-year onboarding plan, activities, goals, and outcomes are determined.
New hire paperwork is completed.	
Employees are enrolled in benefits and incentive programs (or given the necessary information to do so on their own).	<i>Long-term (within first year):</i> Executive has completed onboarding plan and activities and has achieved established goals and outcomes. Executive is participating in daily operations, is working effectively with staff, has been successfully evaluated by supervisors and/or stakeholders, and has established professional development goals for the following year(s).
Employees are given access to proprietary accounts, email, networks, and hardware/software.	

### 3. Onboarding template for several employees

This comprehensive onboarding template ensures consistent and efficient onboarding experiences for several new employees. It aims to establish a strong foundation for teamwork, collaboration, and success across various roles.

The key strength of this template is a transparent process for onboarding multiple employees in parallel.

Onboarding checklist template

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# Modern board management solution in onboarding

Since the onboarding process is intricate and even a minor mistake can lead to a negative experience for a new team member, it is crucial to have an effective solution in place to manage the details.

If worried about onboarding software, board portals are a proven and reliable solution with plenty of uses. Deloitte highlights three benefits of board portals in corporate usage such as access to information, centralized communication, and data protection. Looking to start using board portals? Here are some additional benefits of board portals.

- 1. Centralized information hub.** Board portals provide a centralized repository for important documents, policies, training materials, and resources, making it easy to access all necessary information for onboarding.
- 2. Secure document sharing.** Confidential onboarding documents, such as contracts, agreements, and sensitive employee information, are securely shared and accessed by authorized individuals only.
- 3. Efficient communication.** Board portals facilitate real-time communication between new employees, HR, managers, and mentors, ensuring that all parties are informed and aligned throughout the onboarding process.
- 4. Interactive training.** Interactive multimedia elements, such as videos and presentations, are incorporated into the portal to enhance training and orientation sessions.

5. **Mobile accessibility.** Many board portals have apps that allow new employees to access onboarding materials and participate in remote discussions.
6. **Task management.** With board portals, users can easily assign and track onboarding tasks, deadlines, and milestones, ensuring the process stays on track and organized.
7. **Feedback and surveys.** Board portals enable the collection of feedback and surveys from new employees, helping organizations continuously improve their onboarding processes.
8. **Integration with HR systems.** Board portals integrate with HR software, enabling seamless transfer of employee data and reducing manual data entry during onboarding.

Amid 24/7 support, the Deals Board provides a wide range of features useful in onboarding, including but not limited to:

- ▶ Multi-factor authentication and single sign-on authentication for security
- ▶ Dashboard for meeting info, tasks, and document links
- ▶ Quick meeting setup and customizable notifications
- ▶ Pre-set agenda items, attachments, and preview in agenda and Board Book Builder
- ▶ Table of contents, commenting, and document signing in Board Book Viewer
- ▶ Documents Repository with uploads, access rights, and varied file support

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