# AUTOMATE **EVERY** EMPLOYEE TRANSITION

## HR ONBOARDING CHECKLIST

**Better onboarding leads to 82% higher new hire retention and 70% higher productivity.**

The good news? A platform like Click Boarding makes every one of the steps easy - and automaticallly synced to your HRIS.

### PREBOARDING & COMPLIANCE

#### Document Completion

- Offer letter acknowledgment and countersignature
- I-9 employment eligibility verification (with compliant remote or in-person process)
- W-4 federal and state tax withholding forms
- Direct deposit authorization
- Benefits enrollment paperwork and deadlines
- Background check authorization and status tracking
- Any role-specific agreements: NDAs, IP assignments, non-competes
- Emergency contact and personal information collection

#### System Setup

- Device provisioning and shipping (for remote hires) or desk setup confirmation
- System access requests submitted and confirmed: email, HRIS, project management tools, communication platforms
- SSO credentials and IT security orientation (password policies, VPN access, MFA setup)
- Building access, badge provisioning, or physical security credentials where applicable
- Software licenses assigned and verified before day one

#### Culture-Led Outreach

- Personalized welcome message from their direct manager - digitally or even a note by mail
- Welcome video or message from the team, including executive leadership
- Introduction to the company's mission, values, and culture by their manager, *not* a corporate template
- Buddy or peer assigned and introduced before day one, including LinkedIn URL
- Day one agenda shared in advance so there are no surprises

Culture-Led Outreach changes preboarding from feeling like a transaction to a truly-welcoming experience.

And yet, we see so many teams skip these altogether.

What ROI can you gain from greater automation? Find out in minutes!

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## WEEK ONE

### Day One Planning

- Clear day one agenda distributed in advance
- Dedicated time with manager for role context, priorities, and expectations
- Team introductions: scheduled in advance
- Workstation, tools, and access verified and functional before arrival
- Lunch or informal time with team

### Orientation and Safety

- Facility tour and emergency procedures (if applicable)
- Health and safety briefings
- IT and security policy acknowledgment
- HR policies review: PTO, code of conduct, performance expectations
- Benefits enrollment confirmation & deadline reminder

### Relationship Building

- Introduction to key cross-functional contacts
- First 1:1 with manager scheduled and held
- Buddy check-in completed
- Org chart and team structure shared with context
- **First week pulse check collected**

A 2-3 question pulse check after week one, 30 days, and 90 days goes a long way towards seeing if your onboarding process is driving the impact you're looking for.

## FIRST 90 DAYS

### Goal-Setting and Role Clarity

- 30/60/90 day goals documented and agreed with manager
- Success metrics defined for the role: what does good look like at 90 days?
- Clear understanding of how the role connects to broader team and company objectives
- Career development conversation scheduled within the first 60 days

### Role-specific Training

- Role-relevant systems and tools training
- Product or service knowledge development (relevant to customer-facing roles)
- Compliance training: certifications, mandatory modules, role-specific regulatory requirements
- Job shadowing or cross-functional exposure opportunities scheduled
- LMS enrollment confirmed, where applicable

### Regular Check-Ins & Sentiment Tracking

- Bi-weekly or monthly 1:1s maintained with manager through 90 days
- 30-day and 90-day structured feedback conversations documented
- **Onboarding survey or sentiment check at 30, 60, and 90 days**
- HR touchpoint separate from manager (provides a different channel for honest feedback)
- Recognition of early wins: call out what the new hire is doing well!