

# HR onboarding checklist

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## Your practical guide



### Welcome

Emily, welcome to the company! 😊

### Your Onboarding Journey

- **Job Offer Accepted**  
Access to some essential info to help you get started
- **First Month**  
Full site access, tailored to provide you with everything you need as a new employee
- **Fully Fledged**  
As an established member you'll no longer see the onboarding info

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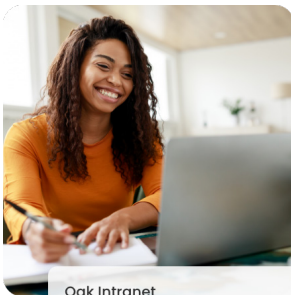
## What is employee onboarding?

**Onboarding** is the process of incorporating new employees into a company and familiarising them with the company culture and policies, allowing them to become effective, contributing members of the team.

**Employee onboarding programs should help new hires to:**

- Understand their roles and responsibilities
- Get comfortable in their new workplace setting
- Meet their team members
- Learn company policies and protocols

Gallup found that only 12% of employees strongly agree that their organisation does a great job of onboarding new employees. This means that 88% don't believe their organisations do a great job of onboarding, which leaves a lot of room for improvement!



Oak Intranet

Hi Ellie, I've updated your onboarding page with your relevant training and department. Please let me know if you've got any questions!

## Why is employee onboarding important?

The benefits of implementing a great employee onboarding strategy are endless. Here are just a few your company can achieve:

- Great employee retention rates
- Engagement from the outset
- Company loyalty
- Productivity

Without the right procedures in place, there is increased risk of employee turnover and loss of productivity from failure to engage. This decreased employee engagement can cost companies huge amounts of money in lost productivity every year. When a company has a great onboarding strategy, however, 69% of employees are likely to stay for at least 3 years.

## HR onboarding checklist

The onboarding stage is the first interaction an employee has with the organisation after the interview process.

If the experience fails to live up to expectations, your new employee might regret their decision to accept the job offer.

A negative impression left by a poor onboarding experience might affect their perceptions about your organisation and its competency, ultimately causing them to quit their role early.

## Your onboarding checklist

### Not sure where to start?

Use this checklist to organise an effective onboarding strategy for your new hires.

### 1. Before your new hire's first day

#### Send a warm welcome email with essential documents including:

- Offer letter
- Links to digital onboarding forms
- Policy documents



#### Schedule a call to:

- Review onboarding documents and forms
- Discuss any company benefits
- Set expectations regarding the new hire's role



#### Build a good rapport with the employee by:

- Letting them know they are valued
- Keeping in touch during the waiting period
- Stay in touch to show that you're excited for them to join



## 2. On your new hire's first day

### Prepare your new hire with the necessary resources and tech such as:

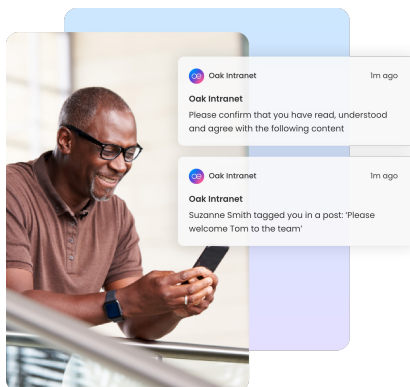
- Laptop or computer and relevant logins
- Specific software to related to their role
- Company accounts, e.g. email, Google Drive, etc.

### Schedule 1:1 meetings to:

- Get them set up and ensure they know how things work
- Introduce them to their team
- Get them up to speed with company policies / procedures




### Explain how your new hires can reach you, including:

- Any messaging or intranet applications you may use
- Email and phone number
- Location



### 3. During training

#### Set up regular training sessions, either:








- In person 
- On a scheduled meeting call with subject specialists 
- In dedicated spaces for demos and practical training 

#### Set role-based goals and objectives for the next:

- 30 days 
- 60 days 
- 90 days 

### 4. During your new hire's first month

#### Discuss the employee's experience of their first month

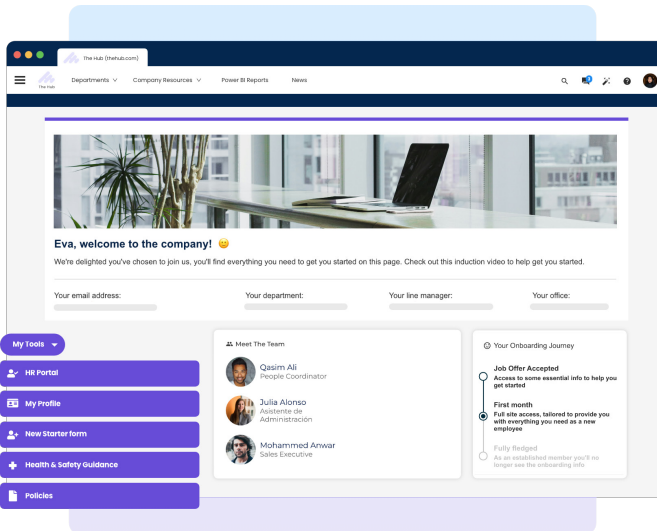
- See if it matches their expectations 
- Review their performance 
- Offer feedback and answer any questions they have 
- Check whether they have any concerns 
- Talk about career planning and development 
- Seek feedback about their onboarding experience 
- Identify if they need any additional training 

## Conclusion

A great employee onboarding program is structured, strategic, and scalable. It goes beyond administrative paperwork to help your new team member feel valued, included, and embedded in your team.

A strong, personalised onboarding process can become more difficult to manage consistently as you scale your business. This is why onboarding systems continue to be a top 10 technology investment, with 83% of employers currently having one in place.

A modern digital solution like Oak can help you execute a more strategic, efficient, and streamlined process that can improve new hire satisfaction, retention, and productivity, as well as managing training and development throughout their lifecycle with the company.



Oak Engage has allowed [Burger King UK](#) to implement an integrated, automated and personalised onboarding process through their app, BK Hub. This has reduced turnover by 32% and has also seen an incredible 40% reduction in new starter drop-out rates in the 6 months since it launched.

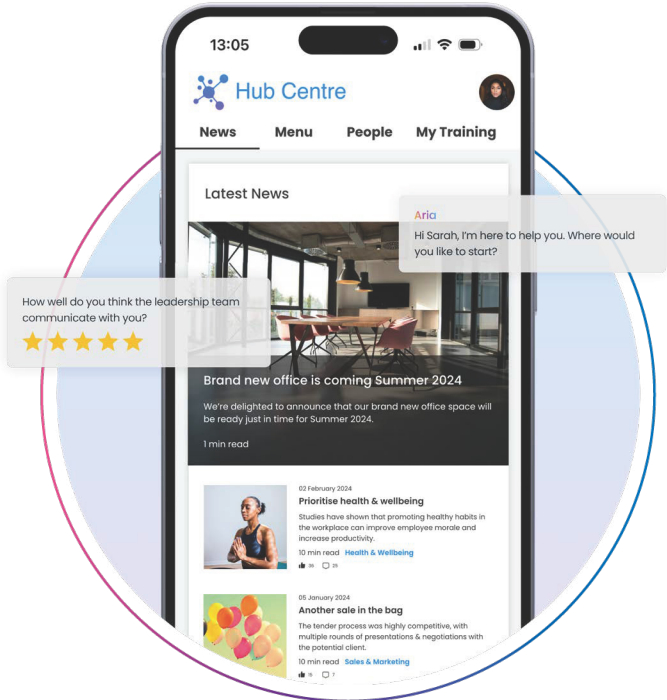


# An award-winning employee app and intranet solution

Oak Engage empowers your teams to get the right message, to the right people, at the right time.

We're here to make communication simple. We believe there is a better way to use technology to engage employees, cut through the noise, and inspire action that puts people at the heart of organisations.

The customer is at the heart of Oak Engage, with an attentive support team on hand to help with any customer queries.



Trusted by the **world's biggest brands**



## Ready to get started?

We offer a free and personalised demo service,  
showcasing our intuitive and easy-to-use platform.  
Tailored to meet your specific needs.

[Book a demo](#)

