



# EANE ONBOARDING TOOLKIT



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## **INTRODUCTION**

Finding and getting talented individuals in the workplace can be challenging. But even after recruiters and hiring managers have done the work and brought in an amazing candidate, there is still plenty of work to be done. The employee experience during their hiring and orientation is essential to ensure your new employees are not only prepared for their new career but they are excited and planning to stay at your organization. Orientation is one piece of the process...onboarding is the whole experience.

### **First Impressions are Lasting Impressions**

From the minute you give the offer, we are potentially moving that person from an applicant to a member of your team. It's important to consider how you are interacting with your new hire going forward. Things as simple as a welcome card or having their office set up and ready can make a huge difference in an employee's initial impressions of the company.

### **Why Focus on a Great Onboarding?**

Hiring and training new people is expensive! And then losing them quickly after hire is even more costly. Doing everything in your power as an organization to make sure you engage your new hires is essential.

- Organizations with strong onboarding processes increase new hire retention by 82% and improve the productivity by 70%.
- Employees who attend a structured orientation program are 69% more likely to remain at the company for at least three years.
- 17% of employees leave their new job between the first week and the third month of a new job.

### **[17 Incredible Onboarding Statistics \[2023\]: HR Trends In Hiring, Training, And Retention – Zippia](#)**

Great onboarding is all about being prepared, taking ownership of new hire development, and communication. There is a lot of uncertainty from an employee when they start a new job, and a sound onboarding process can help an employee feel confident in their new employment decision.

## WHAT ARE THE KEY ROLES IN A GREAT ONBOARDING?

### The Recruiter



#### **QUALITIES OF THE RECRUITER:**

Outgoing  
Creative  
Able to connect with people  
Inquisitive

Your person doing the interviews and making the offer may be that first contact with the applicant. They are responsible for highlighting all the great things about your organization and giving applicants a real picture of the job and the culture. This person sets the tone for a great employee experience!

### The Orientator



#### **QUALITIES OF THE ORIENTATOR**

Informative  
Good Public Speaker  
Engaging

Whether it's HR or another leader, this person is responsible for a huge first impression on their first day. This person should be informative, welcoming, and able to generate excitement and reassurance for your new hire. Do they know how to highlight important details without overwhelming the new hire? Can they make the mundane details of important policies and procedure digestible while not putting the new hire to sleep? This person should enjoy training and helping people feel welcome.

## The Trainer



### **QUALITIES OF THE TRAINER**

Knowledgeable  
Patient  
Detailed

What makes a great trainer? Knowledge alone isn't enough. Great trainers are friendly, patient, and able to break down processes into easy clear steps. They know how to provide feedback without overwhelming their trainee. Training, or lack of, is a big reason employees leave their organization early. Make sure you have the right person for this role!

## The Manager



### **QUALITIES OF THE MANAGER**

Supportive  
Great Communicator  
Understanding

Employees don't leave bad companies; they leave bad managers. As a leader, you have a lot of influence over your employees' environment and work satisfaction. This is particularly true of new hires. Are your managers ensuring great training is happening? Are they making their new employee feel a part of the team? Are they a resource for their new employee?

## THE ROAD TO GREAT ONBOARDING



## **THE OFFER**

Job Offers should express excitement and reassurance that the candidate is joining a great organization. Does your offer have?

- Starting Pay (hourly or salary based on pay period)
- Pay Range (Depending on State)
- Job Title
- Schedule (Days and Hours of work)
- Location of work (Hybrid, Onsite, Remote, etc.)
- Company Benefits (Group Health Insurance, Group Dental, Group Vision, 401K/403b, HSA/HRA,
- Tuition reimbursement, Profit Sharing)
- Perks (Free lunch on Fridays, discounts on memberships)
- Legal – making it not overwhelming but including what needs to be there.



It's also a great place to outline timeframes around eligibility dates. This should be a place to focus on the positives! Their previous employer may try to counter offer the employee and having a great offer can help deter any second thoughts about leaving.

A sample offer letter is included at the end of this document.

### **Provide Wage Range Information as Required by State Law**

- **For Connecticut or Rhode Island employers**, provide at time of hiring
- Wage range can be:
  - Any applicable pay scale.
  - Any previously determined range of wages for the position.
  - The actual range of wages for employees currently holding comparable positions.
  - The employer's budgeted amount for the position.

## **LEADING UP TO THE START DATE**

Remember switching jobs? How were you feeling in that 2-week notice period? It can be very nerve-racking to start a new job especially if you have been in your current role (or with your current organization) for a considerable amount of time. It can be very easy to question if you are making the right decision and forget why you wanted to leave in the first place.

When a new employee accepts the offer, it is important to stay connected with that individual in the weeks leading up to their first day. Touching base periodically prior to their start helps keep them excited and reassured. Keeping them updated on their upcoming first week will also help them start to feel included in the team. The call or email can be as simple as a “just checking in,” and a reiteration that you are excited for them to start. Other things you could consider are a welcome box filled with company merchandise, a LinkedIn invitation, email from the President or senior team, handwritten notes, etc.

Other things to consider before their start date that can both help you and the new employee would include- what can you have prepared so the employee is set up for success? Is there a workspace set up? What passwords and usernames do they need? Are there keys or name tags to be made? Is their technology ready? (Email, computer, phone, etc.) When a new employee starts at a job and everything is prepared for them, it increases their confidence that the company is organized and focused on its people.

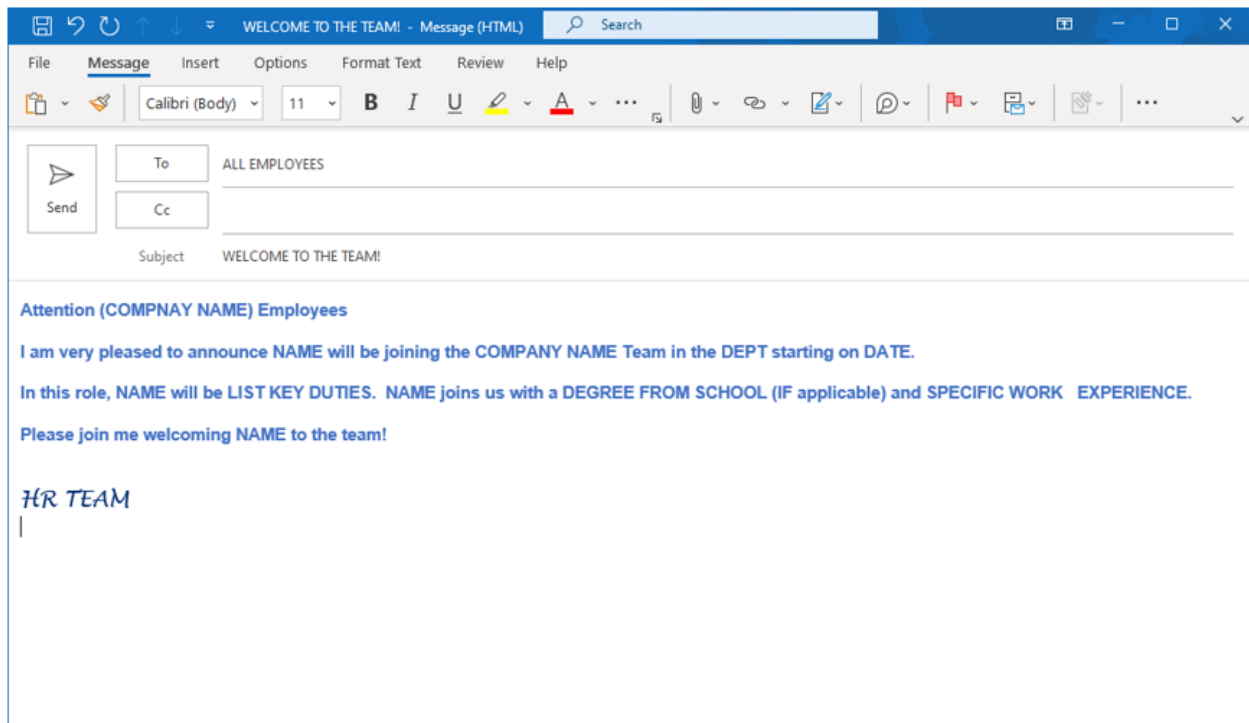


## EMPLOYEE'S FIRST DAY

First days of employment can be overwhelming. It's the employer's job to make the new hire feel welcomed and informed without overloading them. A warm welcome from the team and a great orientation can go a long way. Consider an email, call, or note to the individual detailing what the first day will look like. Include items like specifically what time to arrive, where to park, which entrance to come in, basics like is there a refrigerator to put their lunch in, do they need to bring their lunch on the first day, who will be meeting them, etc.

### Welcome

Think about your company from the perspective of a new employee. Is the entrance clean and neat? Are other employees greeting you as you walk past them? When you tell the receptionist who you are- are they aware and prepared for the new hire? Informing your team and encouraging them to give your new employee a warm welcome can make a significant impact on their first day.





## **Orientation**

The employee orientation is a key component of the onboarding experience. This is an opportunity to communicate the values and policies of your company. This is also an opportunity for you to provide your employee with the necessary paperwork and policies required by your company as well as state and federal laws.

The orientation should be as interactive as possible- not just locking them in the break room and making them watch videos. Some other best practices include walking them through the different enrollment forms, giving them a detailed tour and introducing them to key people and leaders in the organization. Think about which information is critical for the first day and what can wait to avoid overloading the employee. Consider spreading these tasks over a few days. Breaking it up in ways that will provide the new employee with what they need but will get them involved in their work within the first few days and will set a great beginning.

## **ESSENTIAL COMPLIANCE DOCUMENTS AND TRAINING**

### **Ensure Form W-4 and State Tax Forms are Completed**

- On or before the employee's first day of employment, so that the employer withholds the correct federal and state income tax from the employee's pay.
- Complete employer sections of the Form W-4 as appropriate, which includes:
  - the employer's name and address;
  - the employee's first day of employment; and
  - the employer's employer identification number (EIN).
- Make the Form W-4 effective with the employee's first wage payment.
- Maintain a copy of the employee's completed Form W-4 for at least four years to:
  - serve as verification that the employer is withholding federal income tax according to the employee's instructions; and
  - have available for inspection if the IRS requests it.



For a downloadable 2023 Form W-4: [IRS: Form W-4 \(2023\)](#).

\*Check with the appropriate state as to whether new hires will need to complete a state tax form as well as the W4.

### **Verify Lawful Work Authorization Status – Form I-9**

- Ensure that each employee:
  - completes Form I-9 Section 1 on or before the employee's first day of work; and
- By the third day after an employee begins work:
  - review original documents evidencing identity and employment authorization; and
  - complete and sign Form I-9 Section 2, as the employer.
- Store I-9 forms and any photocopies of presented documents:
  - separately from employee personnel files;
  - for the longer of three years from the employee's hire or one year from the employee's termination (or longer if state law requires).

For a downloadable Form I-9: [US Customs and Immigration Services \(USCIS\): I-9, Employment Eligibility Verification](#).

### **Comply With New Hire Reporting Requirements**

- Within 20 calendar days of hire (or sooner if required by state law), report any new employee to a designated state new hire registry (which primarily matches new hires against child support records to locate parents who owe child support). For these purposes, a newly hired employee is defined as an employee:
  - not previously employed by the employer; or
  - previously employed by the employer but separated from that employment for at least 60 consecutive days.
  - review state reporting requirements for the state where the employee works to determine:
    - any expedited time frame for reporting this information;
    - required information to report (for example, legal name, social security number, address, date of birth, and date of hire);
    - acceptable documentation (for example, some states accept a copy of Form W-4 while other require the applicable state tax form); and
    - acceptable reporting methods (for example, online or by mail or fax).

(See [US Department of Health and Human Services \(HHS\) Office of Child Support: State New Hire Reporting Websites.](#))

Note: Many payroll providers will complete the new hire process for you.

### **Provide Sexual Harassment Training, Notice or Policies as Required**

- **For Connecticut employers**, ensure new hires are trained on the subject of Sexual Harassment as required by state law within six months of being hired. At a minimum, the training has to be two hours and be interactive. ([See Connecticut Sexual Harassment Training Requirement webpage.](#)) Additionally, notice on rights and remedies available under Connecticut state law as well.
- **For Massachusetts and Rhode Island employers**, provide current copy of Sexual Harassment policy as required by state law.

## **VIRTUAL ONBOARDING**

As remote work continues to become the norm, employers are now able to hire people across the globe. This is great for our candidate pools, but it can create some challenges for employers when trying to create an engaging onboarding experience. While the methods and processes may be different, the goal is still the same- make an employee feel welcomed and excited to be on the team, give them the information and tools they need to be successful, and keep the lines of communication open. Below are some best practices and things to consider:



### **Leading up to the First Day**

- Consider how the new hire is going to get their equipment. It may need to be sent weeks in advance to ensure it arrives on time. There may also need to be someone available to assist remotely when setting up their computer and programs.
- Is there any paperwork, guidelines, or best practices you can send them to help them prepare for remote work (Quiet Office Space, Bandwidth expectations, different time zone)?
- Consider sending them a recorded video or card welcoming them to the team.
- While you can't take them out to lunch on their first day if they are too far away, you can give them a gift card to a restaurant or coffee shop local to them.
- What is your plan for signing the required documents? Are the signatures virtual?
- Are there laws specific to the state they live in that affect their job?

### **Orientation**

- Is your orientation material ready for virtual? Think about updating or adding new slideshows, videos, or other media to help enhance your orientation.
- Consider breaking up training with virtual chat sessions. Make sure all necessary parties have the Zoom/Teams/etc. links and schedule.
- Use different people for different parts of the orientation. Different styles can help add variety to the training.
- Consider giving the employee some downtime offscreen to review materials or read through the handbook. Hours and hours of talking virtually could be a lot for any employee.
- Are you giving them the necessary state required information based on where they are working out of?

### **Training**

- Ensure your training materials are detailed enough for remote workers. They may need to rely on these materials more heavily.

- Using virtual meetings with screenshares can help enhance the training. Consider creating scenarios where the new employee can take control of the screen and perform the work while the trainer shadows.
- Set clear expectations around remote work. What do breaks look like? What are the communication and response expectations to other employees, customers, vendors, etc? Are they expected to have their cameras on during virtual meetings?

### **Making Them Feel a Part of the Team**



Many remote workers have reported experiencing a lack of social interaction and connection to their teams. For new employees, this could be even more of an issue. Communication during meetings and emails becomes even more crucial because these may be the only channels they interact with certain leaders/people in your organization. As part of creating a great onboarding experience, employers need to find new ways to engage and include their new remote workforce:

- Ensure leaders are blocking out time weekly to talk with new hires. Suggest they talk about more than just work (Nothing too personal)
- Host virtual happy hours or social meetings with departments and teams.
- If possible, consider hosting onsite meetings to get people connected.

### **ONBOARDING IS AN ONGOING PROCESS**

As we mentioned before, onboarding is way more than just an orientation- it is a process that goes on for weeks and possibly months. The key areas are training, introducing the new employee to the culture, ensuring that the new employee builds relationships within the organization, staying in touch with them throughout the process to identify any challenges and helping them work through them, and follow up. The goal is to make sure the employee feels properly trained and supported.

### **Train the Trainer**

A great trainer is more than just a person who knows how to do the job well. They know how to show people new skills effectively. They prepare the trainees for the potential issues and ways to spot them. They give their trainees techniques to ensure the task or work is being done correctly. Ensuring that your trainer understands the company's expectations regarding training is essential.

- Do you have a list of skills/processes the trainer can reference so they know they are covering everything?
- Are there timeframes that provide a guideline for where a new hire should be by certain weeks?
- Are they showing/shadowing the employee? Providing feedback and ways to improve?
- Do they understand and have the patience for the learning curve of the job?
- Are they reporting concerns to the necessary parties timely?



### Training Checklists

How do you consistently make sure we are training an employee on everything? A Training Checklist by position can ensure all the necessary skills and procedures are covered every time. This helps your employee, your trainer, and their manager track your new employee’s progress. This also helps create a clear expectation around what should be learned and by when. These checklists can also include things outside of skills like learning the company mission or trainings around customer service.

TRAINING CHECKLIST		
Employee Name	John Smith	
Position	Accountant	
Date of Hire	1/1/2023	
<b>Week 1</b>	X	Notes
Skill A		
Skill B		
Skill C		
Skill D		
Skill E		
Weekly Check-In		
<b>Week 2</b>		
Skill F		
Skill G		
Skill H		
Skill I		
Skill J		
Weekly Check-In		
<b>Week 3</b>		
Skill K		
Skill L		
Skill M		
Skill N		
Skill O		
Weekly Check-In		

## Training Schedule

In addition to the **Training Checklist**, a **Training Schedule** can help you plan out timeframes as well as who will be doing the training. This also gives employees a clear plan for their upcoming weeks. When creating your training schedule, consider the following:

- How should the training be scheduled so it makes sense to the employee? Think about flow of processes.
- Are there any things happening in real time during their training to give them real hands-on experience (Audit, inventory, etc.)?
- What other departments and processes outside of the employee’s job scope would be helpful to include to help them understand the entire operation?
- How can you incorporate key people into the training to help build relationships and establish rapport with the new hire?

TRAINING SCHEDULE						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	Date: ___ Time ___ Who _____ Subject _____	Date: ___ Time ___ Who _____ Subject _____	Date: ___ Time ___ Who _____ Subject _____	Date: ___ Time ___ Who _____ Subject _____	Date: ___ Time ___ Who _____ Subject _____	
	Date: ___ Time ___ Who _____ Subject _____	Date: ___ Time ___ Who _____ Subject _____	Date: ___ Time ___ Who _____ Subject _____	Date: ___ Time ___ Who _____ Subject _____	Date: ___ Time ___ Who _____ Subject _____	
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	Date: ___ Time ___ Who _____ Subject _____	Date: ___ Time ___ Who _____ Subject _____	Date: ___ Time ___ Who _____ Subject _____	Date: ___ Time ___ Who _____ Subject _____	Date: ___ Time ___ Who _____ Subject _____	

## Employee Check-Ins

When a new hire is not doing a great job or learning as fast as they should be, there is usually an increased urgency and attention around that employee. But what about employees who are doing a



good job? Often employers will give a new hire a lot of attention in the first 1-2 weeks and then not follow up with them on their training and onboarding because management does not hear any complaints. In some cases, this can cause the employee to become disengaged or not get the opportunity to provide feedback. This can ultimately lead to the employee resigning or not having the desired engagement. Scheduling time and having a process for regular (weekly or bi-weekly) new hire check-ins during the first 3 months can help improve engagement, reduce turnover, and get ahead of potential concerns or problems with an employee.

### 30-60-90 Day Reviews

Reviews with new employees are a great tool for a variety of reasons. It gives the employee an opportunity to provide feedback or discuss obstacles or concerns. It also gives the employer the opportunity to provide feedback (both positive and negative) and help set the necessary goals or actions for the employee. Reviews should be done consistently and timely for each employee and should focus on giving and receiving constructive feedback. In many cases, it can provide valuable documentation when justifying a quicker promotion or termination.

30/60/90 DAY PERFORMANCE REVIEW						
EMPLOYEE NAME						
JOB TITLE						
HIRE DATE						
SUPERVISOR						
REVIEW	30 DAY	60 DAY	90 DAY			
		Poor	Needs Improvement	Meets Expectations	Exceeds Expectations	Excellent
KEY COMPETENCY 1		1	2	3	4	5
	Comments:					
KEY COMPETENCY 2		1	2	3	4	5
	Comments:					
KEY COMPETENCY 3		1	2	3	4	5
	Comments:					
KEY COMPETENCY 4		1	2	3	4	5
	Comments:					
SUMMARY						
Employee Signature						
Supervisor Signature						

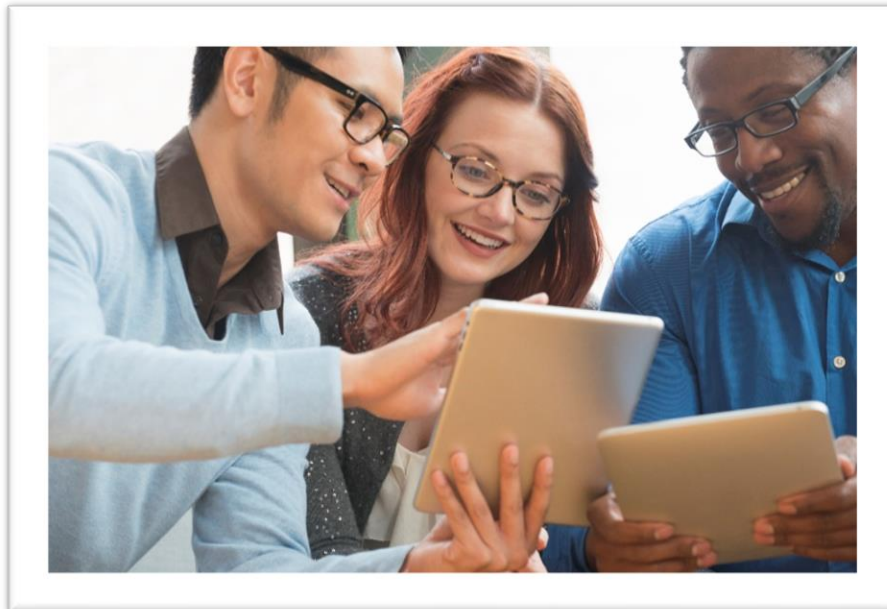
## Assimilating Your Employee to Your Culture

As the new hire moves past it's 90 days, employers should also be setting the expectations around what happens next. Often, the level of attention given to "new" employees will decrease as they learn the job and start working more independently. This may cause them to feel like they have been forgotten or are now just another employee. Employers should consider the following as employee's move past their "training" period:

- What are the employee's goals around performance in the next 3 months/6 months/etc.?
- How often will feedback sessions happen going forward (Monthly, Quarterly)?
- Who can they go to if they need more support/training/etc.?
- How does an employee know if they are doing a good job?

## Having a Great Culture Around New Hires

Great company cultures and great onboarding experiences go hand-in-hand. Great companies view new hires as new members of the team who will have the ability to add to the success of the organization. They understand the value of quality training and don't see it as a burden. Companies with great onboarding experiences take accountability in the employee development process and understand that they play a big part in a new employee's success and engagement in an organization.



**THE ONBOARDING CHECKLIST**

THE ONBOARDING CHECKLIST		
EMPLOYEE NAME:		
START DATE:		
SUPERVISOR:		
POSITION:		
TOPIC	PERSON RESPONSIBLE	
<b>JOB OFFER</b>		
Does your offer include...		√
A statement of excitement to make this offer		
The necessary salary data?		
Job Title		
Work Schedule		
All the benefits and perks		
A start date		
Are we calling them to formally offer the position?		
<b>ONCE THEY ACCEPT THE OFFER</b>		
Do you again express our excitement?		
Do you let them know the next steps		
Background?		
Drug test?		
Do we give them a definitive start date and time?		
<b>LEADING UP TO THEIR START DATE</b>		
Is their workstation set up?		
Desk/Office		
Computer		
Chair		
Is all equipment together/ If remote, is it mailed?		
Are all their credentials and logins set up?		
Email		
Apps		
Is the entire team informed of your new hire?		
Are you touching base with them weekly before they start? Friday or Day before?		
Do you have a detailed Training Calendar?		
Do you have a detailed Training Schedule?		
Are the people training the new employee prepared and have clear expectations?		
Are there any documents around benefits or the handbook you can send them to review?		
Do you let them know about Day 1? (Time, where to park, who to ask for, what documents?)		
Parking		
Entrance		

Dress Attire		
Who to ask for		
Lunch plans		
<b>EMPLOYEE'S FIRST DAY</b>		
Are you ready up front to greet them?		
Are onboarding materials printed/ ready to go online?		
Is the location you conduct your orientation clean and neat?		
Do you have all their necessary keys, uniform, badge ready?		
Do we have a welcome card or note for them?		
<b>ORIENTATION</b>		
Do you have all the documents and notices required by state and federal law? (See list)		
Do you provide them a history of the company?		
Do you give them information on:		
Payday		
Direct Deposits		
Benefits and Eligibility		
Sick Time and Vacation (How to Request)		
Any other special perks and how to use them?		
Any key policies or practices?		
Do we review the organizational chart and talk about who's who?		
Do we provide the proper contact information for different needs		
Do we give them a tour of the facility?		
Do we introduce them to key leaders and executives?		
Is the training on policies interactive? Or are they just reading or watching videos?		
Do we invite any and all questions about the job/company?		
Do we give them an outline of their training and schedule?		
<b>THE EMPLOYEES FIRST WEEKS</b>		
Are you checking in daily/weekly to see how they are doing?		
Are you following our training plan?		
Are you reviewing information with them to confirm understanding?		
Do you let them know who their 2nd level manager is?		
Are you giving constructive feedback (positive and negative)?		
Are you giving them opportunities to decompress and digest information?		
Do you ask them for feedback about our training or process?		
Are you making them feel part of the team?		
<b>ONGOING</b>		
Are you doing 30-60-90-day check ins?		
Are you ensuring the training is continuing?		
How do you set clear goals for them?		
Do you continue to ask for feedback about the process, their managers, co-workers?		

## **SAMPLE OFFER LETTER**

«Current\_Date»

«FirstName» «LastName»

«Address1»

«City», «State» «PostalCode»

Dear «FirstName»:

We are thrilled that you have accepted our offer of employment in the position of \_\_\_\_\_ at Company Name. Your expected start date will be \_\_\_\_\_.

Please find the details of your offer below:

This offer is contingent upon (Include all that apply) **our receipt of references that we consider satisfactory, a background check, a pre-employment drug screen, successful completion of all other facets of our company's pre-employment screening process**

- Your compensation will be \$\_\_\_\_\_/hr or \$\_\_\_\_\_ paid bi-weekly.
- Our benefit plans provide coverage regarding health and dental insurance. You will be eligible for these benefits beginning **(Define eligibility date)**. Costs are outlined in a separate document which we will send over to you. «FirstName» «LastName», our «Title», will meet with you to discuss your benefits after you arrive.
- After **(Define length of time)** of continuous employment, you will also be eligible for Life, Accidental Death & Dismemberment Insurance and Long Term Disability (LTD) coverage at (define price)
- After **(Define length of time)** of continuous employment, you will also be eligible to participate in the company's **pension/401k/ retirement plan**.
- You will be eligible for \_\_\_\_\_ weeks of paid vacation after you have completed **(Define length of time)** and increases based upon your length of service. As with all time off, this time must be arranged in advance with your immediate supervisor.
- You will earn one (1) hour of sick time for every \_\_\_\_\_ hours worked up to 40 hours during calendar year 2023. Unused sick time will not be paid upon termination of employment.
- At \_\_\_\_\_ months you will receive a performance review and at one year you will have the opportunity for a compensation review. You may eligible for an annual compensation review on your first anniversary every year thereafter.

On \_\_\_\_\_, you will meet with «FirstName» «LastName» to complete your payroll and employment documentation. At this time you will need to present two forms of documentation that show you are eligible to work in the United States. You **will also have your photo taken for an I.D. card.**

Your employment status with Company Name will be consistent with state legislation on the concept of “employment at will, specifically any employment relationship between employer and employee is “at-will,” which means there is no guarantee of lifetime employment, and both the employee and/or the employer can terminate the employment relationship at any time.

\_\_\_\_\_, we look forward to providing you with new challenges and rewards at Company Name. We are confident you will find this a rewarding experience. If you have any questions prior to your start date, you may reach me at \_\_\_\_\_.

Sincerely,