

EMPLOYEE ONBOARDING

EMPLOYEE ONBOARDING PROCESS OVERVIEW

1 WEEK BEFORE START DATE

Have Manager send out email template gathering fun facts from the employee. This should then be filed in the employees record.

FIRST DAY

- Have Company swag bag on their desk –
drinkware, notebook, post its, pens and coaster
- Have welcome graphic on the screens
- Have history video (YouTube) up to watch
(insert link to company history/values video)
- CEO, President or Manager writes a welcome note and puts it on their desk

DAY 5 (END OF FIRST WEEK)

CEO, President or Manager writes a notecard to their family about how they are excited for them to join the <Company Name> family.

DAY 5 (END OF FIRST WEEK)

Bring in their favorite food and drink and have them invite their family in for a tour.

SECOND WEEK

Individual meeting with all to understand goals in life - document and put reminders.

- Email to employee with links to social platforms (please follow, comment, share)
- Lunch with the managers (they choose the restaurant)

ONE MONTH

Note from Manager recapping their accomplishments thus far.

TWO MONTHS

CEO, President or Manager writes a handwritten note to family thanking them for sharing their family with us.

EMPLOYEE ONBOARDING PROCESS

TASKS TO BE SET UP AND COMPLETED THROUGH A MARKETING AUTOMATION PROCESS

NEW HIRE INFO PROVIDED TO HR

- a. Name
- b. Email (current, not company)
- c. Job Title
- d. Address
- e. Working Remotely or in office
- f. Start Date

AUTOMATED MESSAGE CONTENT AND TRACKS:

1. New Hire entered into Email Automation Track
2. Assigned Employee releases welcome gifts to Manager or ships if New Hire is working remotely.
 - drinkware, notebook, post its, pens and coaster

1 WEEK BEFORE START DATE

1. Email to New Hire from Manager: (New Hire email 1)

*<First Name>,
We're excited to have you start with <Company Name>! Before that, we'd love to learn a little more about you. If you would, please take a couple minutes and share the answers to the following questions with us:*

- *Spouse/Significant Others Name (if applicable):*
- *Child/Children's Name(s) (if applicable):*
- *Pet's Breed and Name (if applicable):*
- *Favorite Genre of Music:*
- *Favorite Food:*
- *Favorite Restaurant:*
- *Favorite Drink (nonalcoholic):*
- *Favorite Drink - (alcohol is acceptable here):*
- *Home Address (don't worry... we won't show up):*

We're looking forward to seeing you next week!

2. Email to Manager: (notification hire 1)

*<New Hire name> is starting <start date>.
Please have the following things prepared on their desk:*

- *Welcome gift (will be released to you by Assigned Employee or shipped by Assigned Employee if working remotely)*
- *History Video ready to play on their desktop: (insert link to company history/values video)*

EMPLOYEE ONBOARDING PROCESS

1 WEEK BEFORE START DATE (CONT.)

3. Email to Company CEO or President: (notification hire 2)

*Company CEO or President, <New Hire name>
is starting <start date>. Please write a welcome
note and leave on their desk. If they are
working remotely, just send email.*

2 DAYS AFTER HIRE STARTS

Email to Manager: (notification hire 3)

*This is a reminder to please bring in
<New Hire name>'s favorite food and drink
and have them invite their family in for a tour.
You can do this any day this week, we suggest
Friday. If they are working remotely, please
have a fun treat delivered.*

5 DAYS AFTER HIRE STARTS

Email to Company CEO or President: (notification hire 4)

*Company CEO or President, <New Hire name>
is celebrating their first week here. Please write
and mail them a note about how excited we are
for them to join the <Company Name > Family.
<New Hire name>
<street>
<city>, <state> <zip>*

7 DAYS AFTER HIRE STARTS

Email to Manager: (notification hire 5)

*Please set up a meeting with <New Hire name>
sometime this week to discuss life and career
goals. Please remember to document and set
any reminders as needed. Also, this week,
please set up a lunch with all the managers.
If <New Hire name> is working remotely, please
mail a gift card for them to grab lunch or set up
a zoom lunch.*

7 DAYS AFTER HIRE STARTS

Email to New Hire:

*Hello! We hope you are getting settled in nicely.
If you have a few minutes, please follow us on our
social channels.
<link to all platforms>*

30 DAYS AFTER HIRE STARTS

Email to manager: (notification hire 6)

*<New Hire name> has been here a month already!
Please send them a quick email recapping their
accomplishments so far.*