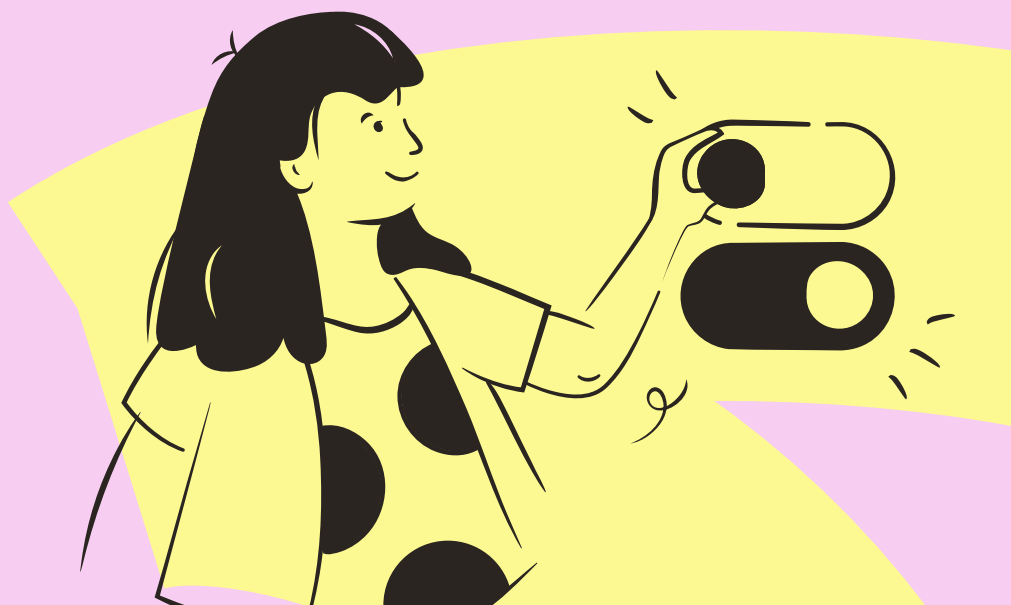




Onboarding Checklist:

A Practical Guide to New Employee Onboarding

Onboarding is more than just an administrative process; it's a critical element of employee retention and integration. This checklist offers a structured approach to ensure your new hires feel welcomed, informed, and prepared.



Why onboarding matters (spoiler: it's crucial)

If you're not investing in your onboarding process, let's talk about the consequences. More than 93% of employers agree: a great onboarding experience means better retention. And when it's done wrong? It costs—literally. On average, companies spend \$1,830 per employee onboarding, with large organizations shelling out over \$3,000. And that's not even counting the cost of bad morale or high turnover. The bottom line: get onboarding right, and you're setting your new hire (and your company) up for long-term success.



Onboarding checklist template

Pre-boarding checklist (before day one)

Setting the stage before the new hire walks in the door

	Action	Example 1	Example 2
Invite to events	Send invites to team-building activities, company events, or social gatherings happening before their first day.	Company happy hour or virtual meet-and-greet	"Meet the team" event or local social gathering
Share resources	Send a welcome email with company handbooks, links to relevant tools, and a "here's what to expect" message.	Welcome email with handbook and onboarding link	Send welcome email with relevant documents and pre-day instructions
Provide access to tools	Give early access to your internal systems so they're not lost on day one.	Grant access to Slack, email, and scheduling tools	Provide login info for internal tools or collaboration platforms
Assign a contact person	Designate a go-to person for questions—someone to help ease first-day nerves.	Assign an HR rep or team buddy for questions	Assign someone familiar with office protocols for support
First day instructions	Provide specific details about where to go, when to arrive, and who to meet.	Clear directions for the first day's schedule	Specific instructions on arrival time, location, and team introductions



Operational onboarding

This distinction between **Practical** and **Functional** focuses on what needs to be learned and practiced immediately (Practical) versus what is more process-driven or role-specific (Functional).

Practical operational onboarding

Action	Example (Frontline Industries)
Workdays & schedules	Explain how to use time clocks, app-based clock-ins, or biometric systems for tracking hours. Make sure employees understand shift patterns, breaks, and overtime.
Leave requests	Walk them through the process of submitting vacation requests through HR software or an employee app, and how to report sick days (whether by app, phone call, or email).
Health & safety protocols	Give safety training on handling equipment (e.g., forklifts, kitchen appliances) and show where emergency exits, fire extinguishers, and first-aid kits are located. In hospitality, teach them how to deal with food allergies and safety procedures.
Workplace cleanliness & standards	In retail, emphasize maintaining clean and organized store aisles, while in hospitality, explain the importance of food prep cleanliness and sanitation procedures.
Uniform & dress code	Ensure they understand the uniform policy (e.g., branded shirts for retail, chef's whites for kitchen staff, safety boots for warehouse workers). Explain when and where to collect uniforms or personal protective equipment (PPE).
Clocking in/out	Walk them through the specific timekeeping systems in place—whether it's a physical timecard, an app like Deputy or When I Work, or a digital system.
Break & meal policies	For hospitality, explain break schedules and meal offerings (free or discounted meals during shifts). For manufacturing or retail, explain the break policy and where employees can go to eat or relax.
Job-specific equipment	Provide hands-on training with machinery (e.g., POS systems for retail, ovens or blenders for foodservice), and make sure they understand safety features and maintenance routines for equipment.



Functional operational onboarding

Action	Example (Frontline Industries)
Team communication	Introduce the team to the internal communication tools (e.g., Slack, Microsoft Teams, walkie-talkies). Ensure new hires know who to contact in case of emergencies or operational issues.
Customer-facing protocols	In retail, explain how to greet and assist customers. In hospitality, walk them through service protocols, from taking orders to handling complaints professionally.
Reporting & documentation	Show them how to log inventory, report customer feedback, or document maintenance issues in a system like an employee app or paper-based logs.
Job responsibilities	Provide a clear outline of key responsibilities, including performance expectations and operational goals (e.g., sales targets, inventory management).
Workplace policies	Ensure new hires are aware of company-wide policies related to customer service, workplace conduct, or emergency protocols that impact their role.



Social onboarding

Action	Example
Communication norms	Set clear expectations for how team members communicate with one another (e.g., mobile phone use, email etiquette, and messaging apps). In retail, this might mean communicating via a store's walkie-talkie system or text, while in hospitality, it could be using internal team communication platforms for shift coordination.
Team introductions	Ensure new hires meet key team members and leaders. For example, introduce them to their shift manager, co-workers on the same team, and other employees they'll interact with regularly. In retail, this might include floor staff, stockroom employees, and managers. In a restaurant, it would include front-of-house staff, kitchen personnel, and supervisors.
Workplace environment	Help them acclimate to team dynamics, including informal social spaces (e.g., break rooms, lounges). In hospitality, this might include familiarizing them with staff-only areas and casual team gatherings, like pre-shift meetups.
Social events & gatherings	Invite them to any upcoming team-building or informal social events. For example, inviting them to after-shift socials, team lunches, or company-wide gatherings, helping them feel included right from the start.
Team roles & responsibilities	Ensure new hires understand each team member's role, from team leaders to support staff. In retail, they need to know who's responsible for opening the store, stocking shelves, or handling customer queries. In manufacturing or logistics, they should understand roles from warehouse management to shipping and receiving.
Engagement with social networks	Introduce them to your internal social network or communication platforms like employee app such as Speakap. Make sure they're connected to team chats, group discussions, and any task-specific channels. In frontline roles, ensure they know where to check in for shift updates, company-wide announcements, or team news.
Feedback & recognition system	Introduce the process for giving and receiving feedback, as well as the company's recognition practices. In retail, this could be recognizing sales achievements; in hospitality, it could involve acknowledging excellent service in front-of-house or back-of-house teams. Ensure new hires know how to share feedback and participate in performance reviews or recognition programs.



Strategic onboarding

Action	Example (Frontline Industries)
Company vision and mission	Share the company's overall vision, mission, and values. In retail, explain how the company prioritizes customer satisfaction; in hospitality, emphasize the commitment to exceptional guest experiences.
Organizational structure	Help new hires understand the company's hierarchy and key departments. For example, explain the relationships between floor staff, managers, and corporate teams in retail or service industries.
Company goals & objectives	Outline the company's key goals and how their role contributes. For instance, in retail, explain sales targets and customer experience goals; in hospitality, focus on guest satisfaction metrics.
Corporate social responsibility (CSR)	Introduce the company's CSR initiatives and explain how they align with company values. In hospitality, this could include sustainability efforts like eco-friendly practices; in retail, highlight community involvement or charitable partnerships.



Continued onboarding

Action	Example (Frontline Industries)
Growth opportunities	Highlight available training, development programs, and career advancement paths. In retail, this could involve moving from sales associate to store manager; in hospitality, it could include opportunities for supervisory roles or specialized certifications.
Mentorship programs	Introduce mentorship opportunities where new hires can learn from experienced team members. For example, assign a senior employee to guide them through advanced skills or role-specific challenges.
Coaching and feedback	Schedule regular coaching sessions and performance reviews to track progress and set goals. In retail, this could involve quarterly performance reviews focusing on sales performance or customer service; in hospitality, feedback might focus on service quality and team collaboration.
Ongoing training	Encourage participation in relevant training and skill development programs. In retail, this might include product knowledge updates or customer interaction workshops; in hospitality, it could involve advanced food safety training or leadership courses.
Cross-departmental involvement	Offer opportunities for employees to work with other departments or teams. In retail, this might include shadowing inventory management, while in hospitality, it could be getting involved in event coordination or kitchen operations.
Industry-related learning	Recommend industry literature, conferences, or professional certifications to support continuous learning. This could include certifications like ServSafe in hospitality or product-specific knowledge for retail staff.



Best practices for effective onboarding

To make onboarding more effective, follow these best practices:

- **Track time to productivity:** The quicker new hires get up to speed, the more value they'll bring. Monitor and streamline this process.
- **Measure new hire retention:** A high retention rate signals that employees are happy and integrated into the company culture.
- **Use feedback loops:** Gather insights from new hires using surveys and one-on-one meetings to improve the onboarding process.
- **Monitor training completion:** Ensure your onboarding training is completed on time and is engaging.



Measuring success: key metrics (because what gets measured gets improved)

Tracking your onboarding process is just as important as running it. Let's look at the key metrics:

- **Time to productivity:** How long does it take for your new hire to hit the ground running? In the US, consider looking at how quickly they're able to handle basic tasks independently. In the EU, this might include integrating them into your team culture and understanding local workplace norms.
- **New hire retention:** A high retention rate means your onboarding process is on point. If new hires are sticking around beyond their first year, they're engaged and settled in. That's a win on both sides of the pond.
- **Employee net promoter score (enps):** Measure how likely your employees are to recommend your company as a place to work. A high eNPS score means your onboarding process is creating positive, long-term experiences. This can be particularly impactful in countries like the US, where cultural fit is crucial, and the EU, where the employee experience and work-life balance are top priorities.
- **Training completion rates:** If your training isn't getting done, there's a problem. Track how many new hires are completing all required training on time. In the US, this might include safety or ethics training, while in the EU, consider ensuring compliance with GDPR and other legal training.

With Speakap, onboarding doesn't have to be a headache.

Speakap makes onboarding simple, efficient, and all in one place. Your HR team wins, your new hires feel like rockstars, and nobody has to chase down a missing form ever again.

5 reasons why you should choose Speakap

- 1 Automate the boring stuff:** No more chasing down forms or reminding new hires to complete tasks. Speakap automates workflows, document management, and task reminders so HR can focus on what truly matters.
- 2 Personalized experiences:** Frontline jobs aren't one-size-fits-all, so why should onboarding be? Tailor employee journeys to each role, location, and team to make new hires feel valued from the start.
- 3 Track progress in real-time:** Speakap lets you monitor new hires' progress, ensuring smooth integration into your culture and operations. Get updates on training, task completion, and feedback in real time—nothing falls through the cracks.
- 4 No more inbox clutter:** Speakap delivers relevant content to the right people, keeping everyone informed without overwhelming them with unnecessary updates. Tailored content keeps your team on track and engaged.
- 5 Instant feedback & communication:** Use quick polls, one-on-one messaging, and video attachments to gather feedback, answer questions, and keep new hires engaged in the process. Keep communication clear and open, whether it's for team events, announcements, or quick check-ins.





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**Ready to simplify your
onboarding and set your new
hires up for success?**

Book a demo

