

HR Engineering Starter Checklist

A practical five-step framework to audit, pressure-test, and rebuild your onboarding process for scale.

How to use this checklist. Work through each section in order. Don't skip ahead; each step builds the context you'll need for the next.

1 Map your current process

- Document every step from offer accepted to first day, including who is responsible for each.
- Identify which steps require manual follow-up to complete.
- Note every point where the process depends on someone remembering to do something.
- Flag every decision that gets described as *"it depends on the situation."*

2 Build your context model

- List the worker attributes that change what someone needs to do (role, location, client, type).
- Map which requirements apply to which combinations of those attributes.
- Identify where that logic currently lives: in someone's head, a document, or a checklist.
- Confirm which of those attributes already exist in your ATS or HRIS.

3 Define your exceptions

- List the escalations your ops team handles most frequently.
- For each one, identify whether it's a rules-based decision or one that genuinely requires judgment.
- Note which exceptions happen because of missing information versus genuine complexity.
- Define what "*flagged for review*" looks like so the system knows when to surface something.

4 Evaluate your platform

- Does your current system run workflows, or does it store data and rely on people to push it forward?
- Can it apply different requirements based on worker context automatically?
- Does every step produce an auditable record without manual documentation?
- Can it handle volume growth without requiring proportional ops headcount?
- Does it give workers a single, clear path through the process?

5 Set a baseline and measure

- Record current completion rate, time to complete, and manual touchpoints per worker.
- Identify the single most time-consuming manual step and target it first.
- Agree on what "*working*" looks like before you start building.
- Schedule a 30-day and 90-day review to assess what changed.

Next step

Once you've worked through all five sections, bring your notes into a working session with your ops and engineering leads. The patterns you've flagged are the blueprint for what to build first.

