

# 7 Steps To Transform Your Employee Onboarding Program

We've all been there — that dreaded first day on the job. Instead of elation, we're suddenly a bundle of nerves. We have an urgent need for reassurance. As soon as we walk in the door, we look to our new employer to make us feel welcome, included, and capable. And it's in employers' best interests to make sure new hires get that welcome. First impressions work both ways, and a quality onboarding program is crucial, for both employees and bosses alike.

## Why Employee Onboarding Matters

Employee onboarding is the process of getting new employees set up with the tools, knowledge, connections, and context to become productive members of the company.

It's also a vital investment for the business. Great onboarding strengthens your new hires' confidence, job satisfaction, and ultimately, their commitment to the company. According to a [2019 study by Gallup](#), employees who go through a strong onboarding program are 30% more likely to say they are fully prepared and supported to excel in their new role, and nearly 40% more likely to feel that they have the best possible job.

In recent years, building a top-quality onboarding program has become more challenging. The workplace has changed enormously, becoming less rigid, more dispersed, and more dependent on technology solutions. With [remote and hybrid work](#) here to stay, delivering a consistent onboarding experience to all your new starts is a real challenge. And it's more important than ever to have clear and well-established processes for introducing new hires to the business and their role, wherever they're based.

## Getting Onboarding Right

In this workbook, we'll take you step-by-step through the process of designing, building, and implementing a comprehensive employee onboarding program that will help you:

- Get best-in-class infrastructure and tech solutions in place.
- Ensure a seamless day-one experience, from team introductions to getting paperwork sorted.
- Supply new hires with performance feedback, encouragement, and clarity from their managers and team.
- Measure the effectiveness of the onboarding program and use new hire feedback to iterate over time.

By following this process, you can make sure all your employees get a consistent, thorough, and engaging introduction to the company and their place in its success, right from the first day.

# A Step-by-Step Guide to Employee Onboarding

## Step 1: Assemble your ideal onboarding tech stack.

Priming your HR tech stack for the overall onboarding process and aligning it with the ongoing employee journey will make for [a best-in-class new hire experience](#). You don't want to overwhelm new hires with having to switch between too many new systems or having to juggle multiple logins. Having a consolidated, integrated tech stack also ensures compliance and performance can be monitored seamlessly across tools.

### Exercise 1: List your key onboarding milestones.

Start by identifying all the milestones and touchpoints employees will need for the onboarding process. You can either limit this to 90 days or build a full year-long onboarding program. [Gallup's onboarding research](#) shows that new employees take at least 12 months to reach their full performance potential. Acknowledging that upfront may help you identify opportunities to reduce the ramp-up time, and also reassure your new hires that it's normal for them to take time to excel.

Here are a few milestones that any strong onboarding program should include. Add any organization-specific or later-stage milestones at the end of the list.

- Job offer
- Set-up email
- First-day training or workshops
- Team communications enrollment
- Payroll and benefits enrollment
- Manager one-on-one meeting
- Team meet-and-greet
- New hire survey
- 30-day review

90-day review

Setting an individual development plan

---

---

---

**Exercise 2: Schedule key check-ins.**

Schedule who will check in with employees during the first few days and weeks, and what tools or approaches you will use, whether face-to-face or using your group Slack channel. Identify who will be responsible for each stage of the process. For instance, HR for documentation and training — and managers for engagement and performance.

Complete the table below to get started. (We've added a few examples to get things going.)

Employee Check-In	Person responsible	Date
First-day meet and greet	HR Manager	
Week-one check-in	HR Manager	

### Exercise 3: Audit your employee experience tech stack.

Now it's time to specify what tools you'll use for each major touchpoint. This will also help to spot any gaps in your software set-up or if there are redundant or duplicate tools.

Look for tech solutions with SSO (single sign-on) and integrations with other tools and systems where possible. This reduces the mental load for new hires and improves the onboarding experience. For example, Lattice integrates easily with [human resources information systems](#) (HRIS) like Bamboo HR, Namely, Rippling, Workday, Zenefits, Personio, ADP, and Gusto.

Here's an example tech audit for you to use for reference:

Onboarding Task	Software	Access Granted?
Interviews	Greenhouse	
Offer Stage	Greenhouse	
Email Access	Google Workspace	
First Day Workshops	Zoom	
Team Communication	Slack	
Video Workshops	Zoom	
Payroll & Benefits Enrollment	Gusto	
Team 1:1s	Lattice	
Onboarding Survey	Lattice	
90-Day Review	Lattice	
Individual Development Plan	Lattice	

Okay, your turn! Fill in the table below to ensure the right tools are set up and ready to go. Store this workbook securely, or add it to your onboarding progress tracker, so you can check that the employee has access to the software they need as they proceed through the onboarding program.

Onboarding Task	Software	Department responsible	Integrations	Access granted?
Interviews				
Offer Stage				
Email Access				
First Day Workshops				
Team Communication				
Video Workshops				
Payroll & Benefits Enrollment				
Team 1:1s				
Onboarding Survey				
90-Day Review				
Individual Development Plan				

## Step 2: Prepare for new hires' first day.

Before you can prepare your new hires for their first day, *you* need to be prepared. When new employees know what to expect on their first day, it can set them at their ease. The first day can be an overwhelming experience, especially with the amount of information, introductions, names, technology, and processes involved. New employees can easily be put off by disorganized or unstructured onboarding. You want to make sure you make a great first impression.

### Exercise 4: Plan new hires' first day

Create a shared checklist with all the stakeholders involved in onboarding your new hires. Here's a task list that you can modify and make your own.

**Meet with new hires' managers** to set out day-one needs and anticipate any challenges.

- Establish devices, software, and access permissions needed.

- Gather orientation documents.

- Plot out week-one goals and expectations.

- Identify new hire buddies.

**Pre-board new hires to help them acclimate**, avoid getting overwhelmed, and ease any newbie nerves before their first day.

- Grant access to your learning management system (LMS) or onboarding tech.

- Make essential HR paperwork, the employee handbook, and other orientation documents available.

- Connect new hires with their new co-workers.

**Set up a new-hire buddy program.** A [new hire buddy program](#) can be a great way to orient new hires, build connections, and get peer support without chasing up a manager.

- Identify buddies, in conjunction with managers and team members.

- Set out buddy roles and expectations.

- Encourage buddies to reach out to the new hire before their start day, to introduce themselves, and make arrangements to meet in the first week.

**Create a first-day agenda** to provide structure and a sense of grounding. Schedule each part of their first day.

- Tour the office and key areas.
- Meet the team.
- Have lunch with your manager and/or team.
- Complete HR documentation.
- Receive IT resources and devices.
- Enroll in the necessary technology.

**Exercise 5: Create a sample day-one agenda.**

Use the checklist above to guide you, and add your own relevant activities. Identify key people and resources for each activity.

Time	Activity	Key people	Resource
9:00			
9:30			
10:00			
11:00			
12:00			
13:00			
14:00			
14:30			
15:00			
16:30			



### Step 3: Take care of essential documentation.

As much as employees' first day can be a whirlwind of meetings, workshops, and introductions, there's always some paperwork that must be processed on day one. To ensure this critical step doesn't slip by, schedule sufficient time on the first day to check, sign, and process those forms, and deal with any queries or complications.

Here's a checklist of key documentation you may want to have prepared and ready to be filled out.

#### **Employment documents**

- Job acceptance letter
- Educational transcripts
- Signed employment contract
- Identification
- Other \_\_\_\_\_

#### **Legal information and documents**

- Salary and benefits
- Tax statements
- Pension
- Social security
- Healthcare
- Working hours
- Other \_\_\_\_\_

## Internal documents

Employee handbook and policies

Organizational chart, setting out relationships and hierarchies

Evaluation forms

Other \_\_\_\_\_

Depending on which country or jurisdiction the company is based in (and where your remote and hybrid employees are based) the legal documents your new hires need to provide may vary. Remind new employees beforehand if they need to bring any additional documents on their first day. For example, US employees may need to provide HR with multiple forms of ID to get their Form I-9s signed.

## Step 4: Set up one-on-ones.

For new hires to feel welcomed and engaged, they need to see that their managers are invested in their onboarding process and supporting their progress — right from the start.

One-on-one (1:1) meetings give managers and employees an informal strategy for regularly sharing ongoing feedback on progress, day-to-day challenges, and skills development. Lattice's engagement research shows that employees with regular one-on-one meetings with their managers tend to report higher engagement and satisfaction levels.

Ideally, one-on-one meetings should be:

- **Frequent**  
Depending on the capacity and the team size, aim to check in with new hires daily in the first week — even just a few minutes at the end of the day. This can keep things on track, catch any issues, and allow them to ask questions. From their second week on, check in once a week. You can schedule regular check-ins and build a collaborative agenda with new hires using software like Lattice.
- **Employee-led**  
One-on-ones offer [an opportunity for new hires to discuss](#) and share their experiences, their challenges, and their needs. That said, setting expectations is essential so that both you and new hires get the most out of the meeting. Using framing questions and specific talking points can prompt them to think through relevant topics. Lattice offers built-in questions and talking points that can be tailored to meet individual needs.
- **Informal**  
Employees, especially new hires, should feel open and comfortable in a one-to-one meeting. Consider getting away from the desk or even away from the office. However, do make sure to take notes so that any action points don't get missed.
- **Goal-focused**  
One-on-ones should be focused on expectations, development, and performance. Take a moment to review what they have achieved since the last meeting, what they can achieve by the next meeting, and what tools or support they may need to accomplish that.

Set a precedent by scheduling an initial one-on-one with new hires and then following up with a weekly schedule.

**Exercise 6: Create a draft schedule for manager one-on-ones.**

	Day & Date	Time	Location	Notes
Week 1	Mon __/__/__			
	Tues __/__/__			
	Wed __/__/__			
	Thurs __/__/__			
	Fri __/__/__			
Week 2	__/__/__			
Week 3	__/__/__			
Week 4	__/__/__			30-day check-in
Week 5	__/__/__			
Week 6	__/__/__			
Week 7	__/__/__			
Week 8	__/__/__			60-day check-in
Week 9	__/__/__			
Week 10	__/__/__			
Week 11	__/__/__			
Week 12	__/__/__			
90-Day Review	__/__/__			

### **Exercise 7: Identify key talking points for one-on-ones.**

Support your managers by providing standardized templates they can use to have more constructive and focused 1:1s. Use the following headings and example questions to guide you. You can also use our template for [manager talking points for onboarding 1:1s](#).

#### **Priorities**

Example: What is most important for you to discuss right now?

#### **Success and Achievements**

Example: What was your biggest win recently?

#### **Challenges**

Example: What has been the most challenging moment of your week?

#### **Job Satisfaction and Engagement**

Example: What motivates you most about your work?

## Teamwork and Colleague Relationships

Example: Are there any issues with your teammates you'd like to discuss?

## Learning and Development

Example: What skills do you need to develop to achieve your career objectives?

## Giving and Receiving Feedback

Example: How do you prefer to receive feedback?

## Step 5: Survey new hires after 30, 60, and 90 days.

According to [Work Institute's 2020 Retention Report](#), around 40% of employee turnover occurs within the employee's first year with the organization. To keep new hire turnover rates as low as possible, keep cultivating your new hires' employee experience throughout that period.

At the same time, remember that, as much as new employees may appreciate daily or weekly support in the early days, they'll also want to feel independent and capable. Using surveys at the 30, 60, and 90-day marks helps maintain the regularity of feedback opportunities while avoiding the hand-holding of constant check-ins.

You can also keep the feedback flowing between these milestones with ongoing pulse surveys. These can help you capture a real-time snapshot of employee sentiment or gauge the effectiveness of your onboarding.

### Tips for Effective Surveys

1. Use a range of survey approaches, including Likert scale (“strongly agree” to “strongly disagree”), multiple choice, and open qualitative comments to drill down into your new hires' experiences.
2. Capture demographic data on employee characteristics, such as:
  - Age
  - Department
  - Ethnicity
  - Identified gender
  - Role and level
  - Salary band
3. Use your survey tool's [analytics](#) to filter for trends and draw insights from your survey data.
4. Turn your results into action points. This can inform how you approach and ensure [diversity, equity, inclusion, and belonging](#) (DEIB) for everyone.
5. Use this data to adjust and fine-tune your onboarding practices over time.

**Exercise 8: Create sample Likert Scale survey questions.**

Think of three positive employee statements you would like new employees to strongly agree with after 90 days. Be specific.

Example: I feel comfortable sharing feedback with my manager.

**Now, think of an action point for each if employees respond with “Disagree.”**

Example: Encourage the employee to discuss their feedback with their buddy. Then schedule an informal meeting with both the employee and their buddy.

For an extensive list of survey questions for new hires, [download our new hire onboarding survey template](#).



## Step 6: Schedule 90-day reviews.

At the end of that critical [90-day period](#), managers and new hires should take stock of everything that they've worked on and achieved. This is the point for removing the training wheels, setting your new hires up for the rest of the employee journey.

Engaging in-depth with your new hires at this stage is a key milestone for a number of reasons:

- It's an opportunity to assess and reflect on progress and performance measures up to expectations, and to course-correct for future performance
- It's also an opportunity to offer employees praise and encouragement, and to reinforce their importance to the role, team and company.
- It gives new hires a structured space to feed back on their experience so far, on what has worked and what could be improved.
- It provides valuable feedback for managers and leaders on how they can be more supportive and effective.

Using a platform like Lattice can help you structure this process and automate any repetitive and routine aspects, so that you can focus on the human side of things. Use or customize [this checklist to prepare for 90-day reviews](#).

## 90-Day Review Checklist

Schedule a 90-day review immediately after 60-day review.

Send initial notifications to employees and their managers.

Set automatic reminders for employees and managers.

Set a **one-week** reminder.

Set a **one-day** reminder.

Set a **one-hour** reminder.

Schedule automated prompts for pre-review survey.

Identify relevant key performance indicators or other metrics for new hires.

Download and customize our [90-day review template](#) and [probation review template](#).

## Step 7: Cultivate growth beyond 90 days.

The more you invest in your onboarding process, the more it will pay dividends in the long run. Taking your new hires beyond the first 90 days of their onboarding, and mapping out the longer journey, will help keep them focused on their growth and aligned with the business's goals.

Build on the connections and commitment you've cultivated over the onboarding process, and keep those practices going.

- Encourage managers to schedule one-on-one growth conversations to give employees a forum to discuss their goals and development plans. These could be monthly or quarterly.
- Require managers to work with employees to develop a longer-term growth and development plan based on the onboarding groundwork. This demonstrates your commitment to your employees' progression.

For example, on the Lattice platform, managers can work with employees to develop dynamic short and long-term [individual development plans \(IDPs\)](#) that guide continuous growth and encourage engagement, retention, and high performance.

Lattice's IDPs combine [growth areas](#) with a [career vision](#). Growth areas allow employees to work with their manager to identify development opportunities, set short-term goals, and track progress toward them. A career vision allows employees to outline their long-term goals, aspirations, and strengths.

### Remember: Onboarding is just the first step of the journey.

Onboarding isn't just about introducing your new employees to their jobs. Nor is it just about administration and compliance. Onboarding is the launchpad for the greater employee journey.

If you can get the onboarding process right, you'll go a long way to engaging your new hires right from the start, reducing attrition, and setting the stage for ongoing growth.

Lattice works with businesses to develop engaged and high-performing individuals and teams, right from the start. Our solutions help new hires set goals and develop competencies and skills, while giving managers the tools to support employees' growth and performance. Request a demo to discover how Lattice can help you create a best-in-class onboarding program

[Request a demo](#)

## Additional Resources

If you want to learn more about onboarding, take a look at our free resources:

[8 Must-Haves for Your Employee Onboarding Process](#)

[Onboarding & Exit Surveys](#)

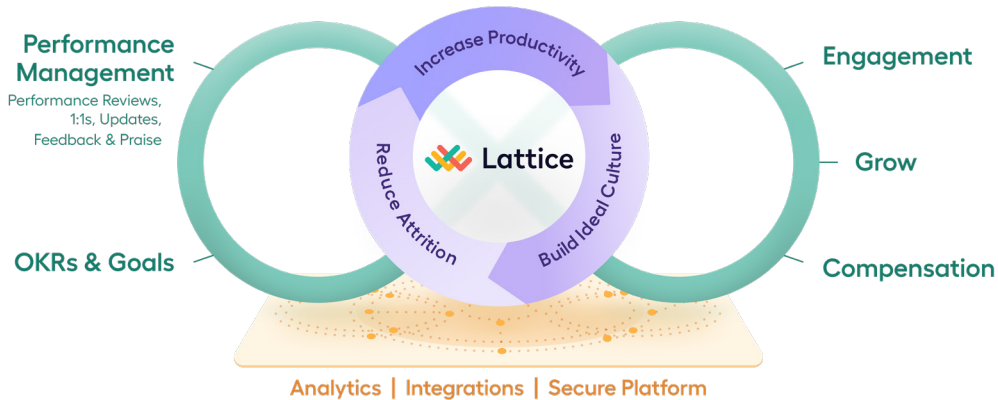
[How Lattice Made Onboarding Entirely Virtual — and Better Than Ever](#)

[3 Best Practices for Hybrid Hiring and Onboarding](#)

[How to Build a New Hire Buddy Program That Engages Employees](#)

# About Lattice

Lattice is the people success platform that enables HR leaders to develop engaged, high-performing teams. By combining continuous performance management, employee engagement, development, compensation, and growth in one solution, organizations get powerful, real-time analytics that leads to actionable insights turning managers into leaders, employees into high performers, and companies into the best places to work.



## The Lattice People Success Platform

Lattice works with companies that aspire to put people first. Whether redefining the beauty industry or building self-driving cars, all of our customers have one thing in common: They value their employees and want to invest in the development and success of their people. To see Lattice's platform in action, [schedule a product tour](#).

## Trusted by the best places to work

Discover how Lattice empowers thousands of companies to build award-winning cultures.

Request a demo

