Dropbox Sign
Onboarding Checklist

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Onboarding best practices —from start to finish

In our 2022 small business forecast, we found talent scarcity and high employee turnover are two of the biggest challenges organizations face. To retain new hires, it's important to engage your employees from the start and the companies that are managing to hire effectively right now are changing their processes to do it.

But how can you ensure new hires have easy access to the information they need to hit the ground running—so they stay engaged, productive, and ready to work?

The answer—**A strong onboarding process.**

Imagine if every new starter—whether they're remote, hybrid, or in the office—had everything set up, planned, and prepared for them on day one. Everyone's been introduced and knows what they're here to do, all starter documents are signed and ready to go, and your new hire has been briefed on what to expect in the first few weeks on the job.

Onboarding sets your employees up for success, so your new, fresh-faced team member can start their job with the confidence they need to be productive from the get-go. Ultimately, a positive onboarding experience results in employees who are more devoted to your company. But first, you need to create an onboarding checklist that works—here's how you can get started.

Just here for the checklist?

Take the fast lane
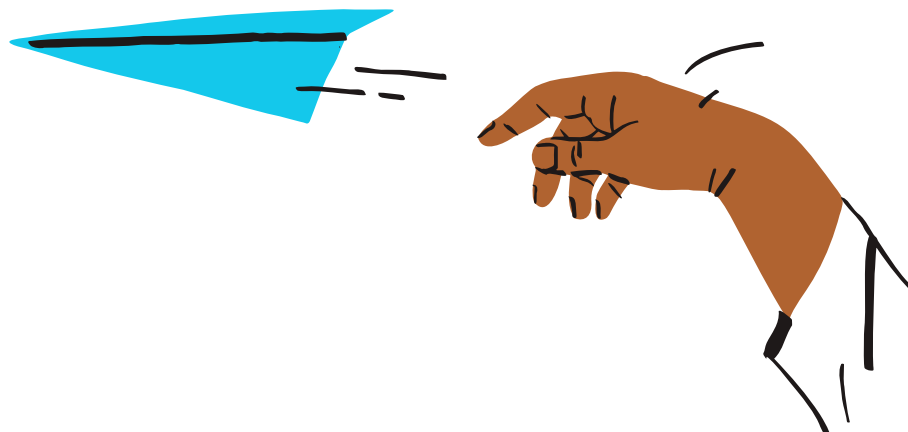
Pre-boarding: A hidden opportunity

Begin at hire, not day 1. Employee pre-boarding is the secret to engagement as it gives new hires a chance to become excited and informed before they formally start.

Onboarding begins here

So you've hired a new employee, great! Soon you'll have another member of the team to help push your business forward. But first, you've got to set them up for their new role and prepare them for the road ahead. And you must do this before their first day.

Draft a welcome email

You need to make your new hire feel included and informed. Start by creating a welcome email that details everything a new hire needs to get up to speed as fast as possible. Got a company handbook? Share it. Got any upcoming work events? Share them. This will help your new hires feel welcome and also gives them time to understand all their required reading. Set out what they can expect from their first day, be as clear as possible, and ask if they have any questions.

Check access permissions

Next, set up all access permissions and invite new employees to get comfortable with the software, tools, and systems they'll be using as part of their job. It's always best to check and double-check access before they start, just in case you've missed one or something goes wrong.

Set up their workstation

Regardless of whether your new hire is working in or out of the office, you'll need to set up their workstation so they've got everything they need to hit the ground running. If you've got company-issued equipment, ensure it's sent out to remote employees early so it arrives in time.

Get your paperwork in order

Lastly, get all pre-boarding paperwork like payroll and tax forms signed as quickly as possible. You can make this easy for your new hires by using an automated workflow tool that lets them sign paperwork on the go. If you get all of the transactional stuff out of the way early, you'll clear the path for your employee's first day and get them excited to kick things off with your company.

Roll out the welcome wagon

[72%](#) of employees think one-on-one time with their direct manager is the most important part of any onboarding process and is essential for getting them ramped up and ready to work.

Establish an onboarding team

The first day is incredibly important for any new hire, so you need to get it right and make them feel welcome. We recommend assembling a well-rounded onboarding team and assigning them a "buddy" to make sure everything goes off without a hitch. Bringing together members across different disciplines ensures you've got all bases covered. Your resident IT expert can help set up their (in-office or virtual) workspace, HR can handle benefits and leave, and management can help establish expectations.

Draft a schedule

A schedule helps employees know exactly what to expect. Make sure you work in that one-on-one time with their direct manager (either in person or video) so you work through any issues and iron out the kinks. This will be a chance to run through company culture, the employee handbook, and expectations for their first week.

Make introductions

Make sure you set up meetings and introductions with the team, either in-person or over a video platform like Microsoft Teams or Zoom. It's worth sending out an email with a brief bio of the new hire before, just so employees are prepared.

Go the extra mile

Making a new hire's day extra special can do wonders for morale and retention. You could encourage people from your team to film a quick welcome video, order their favorite food from a delivery service (like DoorDash) and deliver it in time for lunch, or change your Zoom backgrounds to images of their favorite TV show. These gestures may seem minor, but they'll go a long way to making their first day unforgettable.

Demonstrate your culture at every opportunity

Studies show that companies with winning organizational cultures have [72%](#) higher employee engagement ratings than organizations with weak ones.

Personalize your communications

Your onboarding process is a great way to let your company culture shine through—and the best place to start is through your communications with a new hire. So, add a personal touch to all messages, emails, and more—taking every opportunity to make each hire feel special. When an employee feels like part of a network, they feel compelled to ask questions, share their successes, and promote your business.

Be transparent

There's no use in pretending to be something you're not. When it comes to company culture, you can't fake it till you make it. Pretty soon, your employees will see through you if you're not clear and transparent with what it's like to work at your business. To build a culture of trust, you should keep an open dialogue at all times, invite feedback, and share all news (good or bad!) with your employees.

Share your mission, vision, and values

Poorly communicated company values can derail a company's progress toward strategic objectives. When each employee has a different understanding of your goals, it's much harder for them to arrive at the same destination. Tell the story of your company and explain to your new hire why it's exactly the place they belong.

Keep things simple —eliminate paperwork

On average, new hires have over [50 activities](#) to complete during onboarding, and filling out extensive paperwork and documentation eats up a considerable number of those tasks.
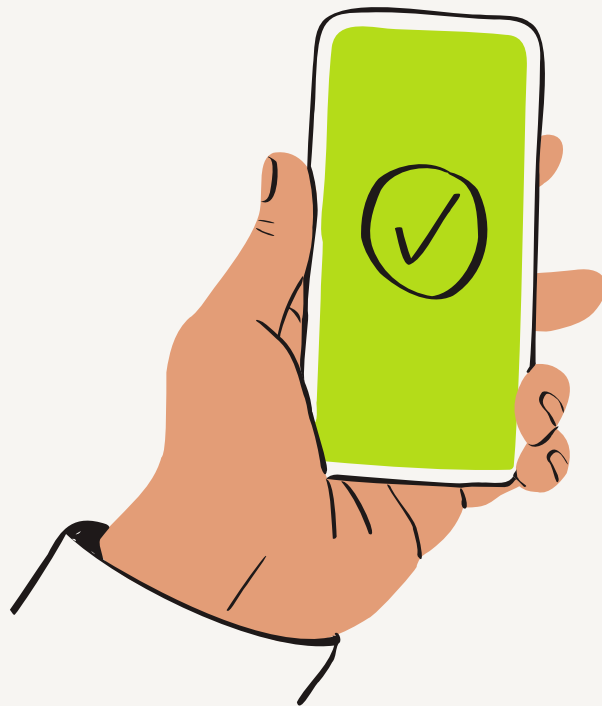
Employ automated workflows to consolidate actions

Physical and PDF forms are hard to complete and often filled out incorrectly because they're complex, redundant, and time-consuming to fill out. Using an automated workflow tool can alleviate these headaches. [Dropbox Forms](#), for example, replaces PDFs with a series of easy-to-follow questions designed to be completed on mobile devices. With intelligent pre-programmed forms, duplicated information collection like name and address is automatically filled out in repeat fields, which means new hires get paperwork done faster. Plus, you can easily track document status all from within Dropbox Forms, so if something gets stuck, you can remedy it quickly.

Use eSignatures to eliminate signing delays

Sending out paper documents for signature and waiting for them to be returned slows down the onboarding process, which can be frustrating for new hires. To keep them happy, you need to make signing simple. That's where eSignatures come in. With an eSignature solution like Dropbox Sign, your hires can sign documents online, anywhere, anytime—even on mobile. This makes onboarding a breeze and can cut down delays significantly.

Make the most of document templates

If you're a growing company, then you know onboarding requires many of the same documents every time you hire a new employee—tax forms, benefits forms, NDAs, and on and on. But finding and editing these forms every time is time-consuming and inefficient. With Templates in Dropbox Sign, you can create these documents once and then reuse them as many times as you need. This effectively automates your busiest work, so you can focus less on paperwork and more time keeping your new hires engaged.

Develop a (flexible) structure for the first few weeks

Everyone works differently. And with remote and hybrid work becoming incredibly popular, you need to structure a new hire's first few weeks with flexibility in mind.

Give employees clear goals

Goals, milestones, and objectives are key during onboarding, as it gives your employees tangible targets to aim for during the first few weeks of work. Even simple goals like making 10 calls or sending 20 follow-up emails can help motivate staff to kick it up a notch. You should also consider making SMART goals for personal development. These are usually more specific long-term goals that you'll spend time creating with your new employee.
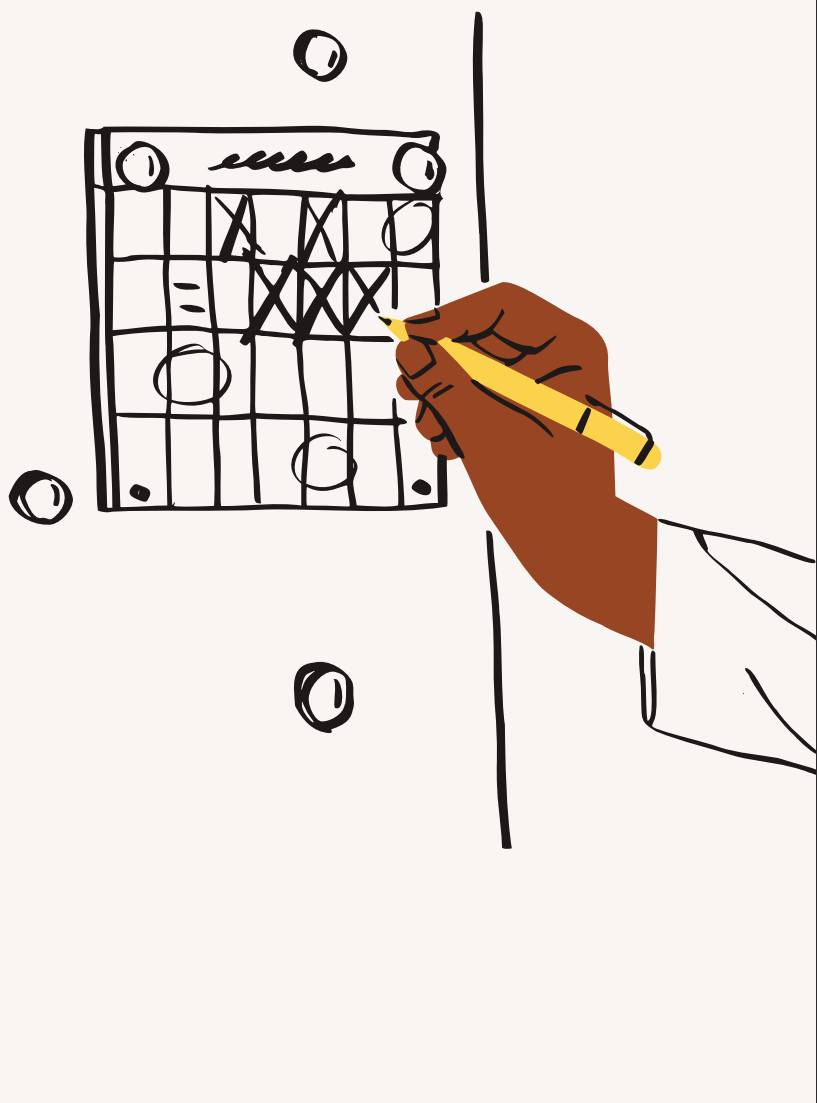
Combine structure with flexibility

While it's important your new hires know exactly what's expected of them, it's equally important to give them a level of flexibility.

For instance, if work often has certain deadlines but could otherwise be done any time of day, allowing flexible hours can be a huge benefit. If work is often solo, likewise for allowing hybrid or remote. Maybe they'd prefer to work 6-3 instead of the traditional 9-5. Perhaps they want to work remotely 3 days a week. Even if flexible hours aren't possible for types of shift and retail work, perhaps it's possible to add flexibility to when and where non-in-person tasks, like admin, can be done. Whatever their concerns, if you're accommodating, it can go a long way in helping them be happy and engaged.

Set up regular touch-points

To keep track of how your new hires are settling in, you should plan regular meetings to go over performance benchmarks. Some companies use a 30/60/90 plan. The plan sets expectations of what they should accomplish in their first 30, 60, and 90 days and checks in with employees about how they're tracking towards these goal. Alongside discussing this document each month, try and meet with your new hires once a week for the first couple of weeks. That way, they'll have a chance to bring up any issues with progress promptly, so they don't fall behind.

Take extra time with remote workers

Not surprisingly, [50% of remote workers feel lonely at least once per week](#). Being part of a community—even a virtual one—helps chip away at isolation and reduces anxiety when starting a new job. So, set them up for success by:

- Ensuring they have the right tools for remote hires to work effectively — tools like video conferencing mean employees can still have face-to-face time with colleagues, chat so they can reach out at any time, and, if you're across the world, visibility of everyone's calendars so they know who's online when.

- Reaching out regularly and offering support—not just in a professional sense, but also making time to check in on how they're settling into the role.

- Being open to flexible working. That might mean rethinking how you measure work. Is it hours spent or results and outputs? If it's results, then flexibility becomes about ensuring that work gets done on time, and less about managing how or when it's done.

Get feedback—and act on it!

Only 12% of employees strongly agree that their organization does a great job of onboarding new employees—88% don't think their organizations do a great job. That leaves a lot of room for improvement.

Ask for feedback throughout onboarding

Maintaining a dialogue with new hires throughout your onboarding process is critical. Any feedback (good or bad) will help you tweak and improve your onboarding checklist going forward. So take the time to listen to your new hires and ask them what worked well, what didn't work so well, and what they'd like done differently if they could start the process over again.

Set up a post-onboarding survey

A great way to gather feedback from your employees is by running a post-onboarding survey. By using a simple rating scale from 1-10, you can get invaluable insights into engagement, organizational alignment, culture, and more. Be thorough, but don't bombard them with so many questions that they feel compelled to skip through.

Take your time—support employees until they're comfortable

Don't stop after a week. Onboarding can take anywhere up to a year, so you must continue to give employees support until they feel completely comfortable on their own.

At this point, your employees should be gaining confidence in their new roles. While the hard part is behind you, the work isn't done yet. Even though onboarding tasks will start to wind down, it's important to continue to give your employees support.

Continue to support new hires

Some employees will take a longer to adjust to a new job than others, so don't rush things. In the coming weeks, be on hand to answer questions, provide further training, and offer guidance where it's needed. It's during this time that you'll likely pass the onboarding baton from HR over to other departments — to help employees understand the more intricate parts of the business and any opportunities for advancement.

Take as much time as you need

Ultimately, your onboarding checklist will account for as much time as you need. but it's always a good idea to keep checking in with your employees every few months for the first year to see if they have any concerns.

The ultimate onboarding checklist

Now you've got actionable advice on creating an engaging onboarding experience that works. But let's be honest, even with the best practices in mind, putting advice into action isn't easy. To help, we've put together a comprehensive checklist of things to things to do throughout the onboarding process—so you can tick things off as you go.

Don't be afraid to add your own and build out a comprehensive list for your business!

Before day one

- [ ] Assemble a cross-functional onboarding team and introduce their "buddy"

- [ ] Make sure you and the new hire's supervisor are aligned on role, goals, and responsibilities

- [ ] Get all the legal forms and documents filled out

- [ ] Prepare employee's in-office or virtual workstation

- [ ] Give access to any tools, devices, doors, etc. they will need

- [ ] Create accounts for them on any software they'll need to do their job remotely

- [ ] Draft a comprehensive welcome email

- [ ] Send any manifestos, handbooks, or articles out for new hires to read

- [ ] Provide a copy of the job description with responsibilities

On day one

- [ ] Make sure your team knows they're arriving and have the hiring manager ready to greet them

- [ ] Formally welcome them to the team and make introductions

- [ ] Start their training workflow

- [ ] Have them scheduled to meet one-on-one with management to address expectations

- [ ] Review and demonstrate company culture

- [ ] Make sure they meet their buddy virtually or in person

- [ ] Go the extra mile and make them feel special

During the first week

- [ ] Get them going on their first real work project
- [ ] Go over expectations for the following month
- [ ] Schedule at least one touch point to collect feedback and answer questions
- [ ] Encourage them to communicate with their point person

During the first month

- [ ] Have several touch points with you, management, and their buddy already planned
- [ ] Explain long-term, high-level company goals so they are aligned on direction and culture
- [ ] Provide reading material for personal growth
- [ ] Set up a few small in-person or virtual events to encourage them to socially interact with the team
- [ ] Ask for feedback on your onboarding checklist

After three months

- [ ] Schedule an informal performance review
- [ ] Review past and future assignments to ensure alignment
- [ ] Review former performance goals and set new expectations
- [ ] Give and ask for feedback again
- [ ] Check employee progress on training
- [ ] Discuss the end of their probationary period and expectations afterward
- [ ] Check in on how they're feeling about company culture and how they fit into it

After six months

- [ ] Conduct a six-month performance review

- [ ] Review employee goals and progress so far

- [ ] Set goals and objectives for the next six months

- [ ] Check that employee has received all necessary training

- [ ] Open the door for honest feedback

- [ ] Make sure they still feel a strong cultural connection

After one year

- [ ] Conduct a yearly performance review

- [ ] Recognize their first year at the company and review how they met expectations

- [ ] Discuss goals, projects, and plans for the upcoming year

- [ ] Discuss compensation and raise policies

- [ ] Ask for—and listen to—feedback on your onboarding checklist and company culture

- [ ] Congrats, you made it to the year-one milestone! Look forward to the next awesome year of working together