Employee Onboarding Handbook

2023

Comprehensive guide for an amazing onboarding process.

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Foreword

The onboarding process is a critical juncture where new employees form impressions that can shape their engagement and commitment to the company. It presents an opportunity to make a lasting impact on their perception of the organization.

Every manager wants an engaged, high-performing team of all-star employees. And when you bring someone new onto your team, you want them to feel like they're a part of that dynamic.

When people are set up for success and properly integrated into the team, it sets the tone for their experience as an employee at your company. And the intangible benefits of proper onboarding — from making employees feel empowered, excited to work, and like they are a part of something — lead to real, tangible outcomes.

Onboarding is a prime opportunity for employers to win the hearts and minds of new employees. Don't waste it. It's like investing in the short-term for a new employee's long-term success.

AMRIT SINGH
Co-founder and CRO at Loop

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About Loop

The Indian healthcare system is flawed. Hospitals react to sickness but do not offer quality care. Doctors attend to the patients but do not give them enough time and care. Bills are soaring high, booking an appointment is cumbersome, and lab tests are getting expensive.

You see, there are many areas that need attention. And that's what we, at Loop, are aiming to fix. At scale. We've built an insurance and care platform that makes employee health benefits simple, useful, and holistic.

Founded in 2018, Loop Health is the fastest-growing B2B healthcare startup in India. We're proud to serve 400+ companies like NoBroker, Medline, Zoomcar, General Electric, and Bajaj to insure 300,000+ employees and their families. We are backed by top-tier investors like Elevation Capital, Khosla Ventures, and General Catalyst, and have raised more than $40m+ towards our vision of rebuilding healthcare and insurance from the ground up.
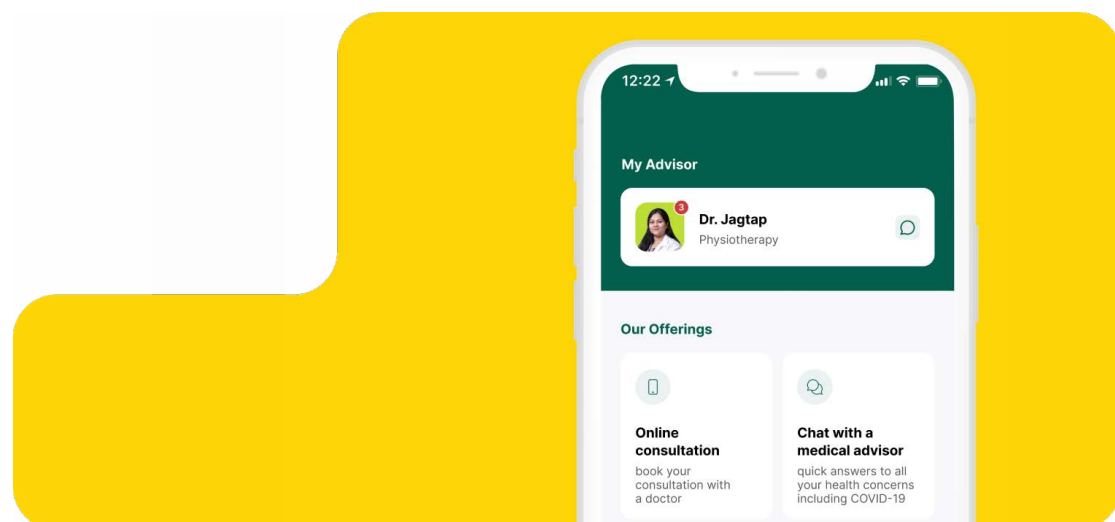
Introduction

Every HR must have an effective onboarding system in place. When done properly, the onboarding program engages new hires in their role and they're geared up to hit the ground running from day one.

Whether it's physical or virtual onboarding, it's quite a complex process and calls for various components - from documentation to assimilating in the workplace to ongoing engagement.

To make things simpler, we've come up with an employee onboarding checklist. The onboarding checklist for managers ensures you have a streamlined onboarding experience and you don't miss a beat when you onboard a new employee.

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Day One Agenda

The new employee onboarding checklist begins on day one. It's the first day. Virtual employees or not, let your new hire take it slightly easy. Let them know what they've gotten themselves into for the first day/week, etc.

> **Pro tip:** Give yourself enough time in the morning to get your coffee, make your breakfast, check your emails, print or share documents, and handle any last-minute tasks before your new hire arrives.

Let's begin the onboarding process.

- **10:00 a.m.** - Go on a tour of the office. Show them around, let them get to know room names, department islands or areas, common areas to hang out in, and more.
- **10: 30 a.m.** - A quick tour of the kitchen like, where the stuff is kept for their morning cup of coffee.
- **11:00 a.m.** - Get down to business and review the onboarding plan.
- **12:00 p.m.** - What's work without bonding? Time for a team lunch.
- **1:00 p.m.** - Coffee run! (manager, onboarding buddy, person they clicked with during the interviewing process)
- **2:00 p.m.** - Flex time, allow them to take it all in. They can start by going through the onboarding checklist for employees and other reading material. Remember, the first day can be overwhelming. So let the onboarding plan be simple.

Working Cadence

Don't leave your new hire wondering when they're supposed to be somewhere. Before their first day, plan a calendar for them. Include this in their onboarding checklist. They will know the list of meetings they've been added to when they review the checklist.

- ☐ **Monday team stand-up**

- ☐ **Weekly 1:1s (Tuesdays at 4:00 pm)**

- ☐ **Team lunch (M, W, F at 12:00 pm)**

- ☐ **Friday all-hands**

- ☐ **Daily growth stand-up**

Goals For The Week

For employees working remotely, a remote employee onboarding checklist should contain the following. Of course, this holds good for in-office employees as well. But, it's more important for remote workers as they're working from a distance. The employee onboarding checklist for managers must contain a list of things to do. It helps smooth things out.

Things to do done in the week should look something like this:

- ☐ **Review welcome kit**

- ☐ **Technology squared away (Do you have all of the tools and software you need?)**

- ☐ **Chip away at the reading list**

- ☐ **Complete employee profile for the company intranet**

- ☐ **Wrap up any new-hire paperwork**

- ☐ **Get set up with benefits and perks**

- ☐ **Meet your team members**

Let's Get Down To Business

It's important to get your employees to learn how they're going to contribute to the organization as well as utilize their time. The following employee onboarding process checklist will help ensure they keep track of things to do as well as know how they're contributing. Again, this is really helpful for remote employees.

30 day goals
What does success at 30 days look like?

-
-
-
-
-
-
- 30 day check-in scheduled for [date and time]

60 day goals
What should this new hire be able to do or accomplish by the end of 60 days?

-
-
-
-
-
-
- 60-day check-in scheduled for [Date, time]

People To Meet

It's crucial to ensure employees take some time during the first couple of weeks to reach out to different team members. It helps learn about the company and the company culture, build employee relations, boost employee experience, establish alignment, improve engagement, and more.

[Example] Rahul Gupta, Product Manager
[Example] Sonam Jha, Sales team
[Example] Pankaj Rao, Graphic designer
[Example] Ananya Tandon, Digital marketing manager

30-60-90 Day Remote Onboarding Checklist

Now that you have brought on new remote employees, it's time to set them up for success. **The key will be defining what success looks like in a 30-60-90 day plan.** Review the plan together with the employee during their first week and you will develop an outline that you both are invested in.

Days 1-30 should be focused on assessment and info gathering.

Days 30-60 should be centered on planning activities and embracing the role.

Days 60-90 should be the execution/review stage.

15 days

The new hire should:

- [ ] Be introduced to all important team members they will work with on a regular basis via video conferencing.

- [ ] Book one-on-one video calls with key cross-functional team members who will be the first point of contact.

- [ ] Be trained on the tech stack: CRM, productivity tool, IT, HR & support tools, etc.

- [ ] Have a daily check-in the first week to support the new hire through the technology and people learning phase.

- [ ] Have a 1:1 at the 10 and 15-day mark to help bridge the problems they face.

Questions to ask in 1:1

- [ ] What do you like about the organization and your job so far?

- [ ] Tell us some of the highlights of your experience.

- [ ] What has been going well?

30 days

The new hire should:

- [ ] Be comfortable with the technology stack and be able to use them with minimum supervision.

- [ ] Collaborate with different teams.

- [ ] Follow necessary channels, like Slack, for cross-team collaboration.

- [ ] Participate in weekly team meetings, All Hands, Townhalls, etc.

- [ ] Plan activities, and set goals, and objectives

Questions to ask in 1:1

- [ ] Since you've had a month to experience your role and the organization, do you have any blockers or misunderstandings?

- [ ] Since you joined us, are there any surprises you've faced?

- [ ] During the interview process, is there anything we could have done differently to help you realistically prepare for your new role?

60 days

The new hire should:

☐ Have fully completed the company training. Now, all tools and sources of information must be understood.

☐ Reach their weekly KPI goals and monthly metrics.

☐ Develop a rapport with each team member.

☐ Recommend changes to improve their assignments.

☐ Comfortable with the standard 1:1 timeline and process with their manager.

Questions to ask in 1:1

☐ Do you have too little, too much, or enough time to do your work?

☐ Is there anything we can do to help you further progress in your role or smooth the transition?

☐ Do you feel you've received sufficient training in the various aspects of your role so you can perform at a high level?

90 days

The new hire should:

- [ ] Meet or exceed their OKR objectives and KPIs.

- [ ] Finish projects they have started since joining the company.

- [ ] Have a 90-day evaluation with their manager where they grade the remote onboarding process.

Questions to ask in 1:1

- [ ] Since your arrival, which colleagues have been particularly helpful?

- [ ] When you have questions about work, who do you reach out to?

- [ ] Thus far, have you faced any conflicts or uncomfortable situations with customers, coworkers, or supervisors?

- [ ] What do you think of our remote employee onboarding program? Do you have any suggestions to help make our onboarding program stronger?

Set Your New Hire Up For Success

As the hiring manager, a hire checklist or an onboarding checklist for hiring managers is a critical component of the employee onboarding process.

The idea is to lift new hires out of an ocean of ambiguity and onto your ship. A smooth transition helps beat employee turnover within the first 46 to 60 days, as well as keep employees engaged in your company.

Remember, there's no one-size-fits-all approach to onboarding. Onboarding programs work because they're relevant, unique, and specific to your company and your new hire.
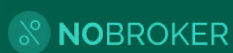
We're giving you this employee onboarding checklist to provide structure, get you started, and give you some inspiration. It's an excellent starting point for you that you can easily tweak based on your organization's needs.

Like the onboarding checklist, you also need health benefits to set your new hire and existing team up for success. Reach out to Loop to get that going for you!

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