

# Essential Onboarding Training Checklist

There's a big difference between onboarding and orientation. Yes, they both start with an O and are crucial to new hires, but they're different. Orientation is a company-centric checklist completed in your new hire's first week. Onboarding is a job-specific process that creates a confident, engaged and valuable contributor over many months.

For each of the checklist items below ask yourself, "How does my current onboarding training stack up?" Then see what category your Onboarding Training falls under.

ORGANIZATIONAL BASICS: PROVIDING A SOLID FOUNDATION FOR SUCCESS			
	IT'S GREAT	IT NEEDS WORK	IT DOESN'T EXIST
Company history			
Company vision			
Company goals			
Company structure			
Value proposition			
Mission and values			

HUMAN RESOURCES: COME GROW WITH US			
	IT'S GREAT	IT NEEDS WORK	IT DOESN'T EXIST
Company policies			
Company culture, quirks, and, inside info			
Performance management and expectations			
Career development and goal-setting			

MEET THE TEAM: WELCOME ABOARD!			
	IT'S GREAT	IT NEEDS WORK	IT DOESN'T EXIST
Role objectives and responsibilities			
How individual roles support the organization's goals			
Dedicated time with your new team: human connection is critical to success			
Dedicated time with cross-functional departments: foster a well-rounded perspective			
Assign mentors/buddies (best practice: a leader buddy, culture buddy, and role buddy)			
Establish a job shadowing lead			

ROLE SPECIFIC TRAINING: <i>EVERYTHING REQUIRED TO CREATE A VALUED CONTRIBUTOR</i>			
	IT'S GREAT	IT NEEDS WORK	IT DOESN'T EXIST
Knowledge: What I need to know to accomplish my job			
Skills: What I need to do to succeed in my role			
Behaviors: Actions and decisions that put my new knowledge and skills into practice			
Personalized training: Specific to each role, for enhanced training efficiency			
Cultural assimilation: Rituals and values are pervasive and worth repeating			

PRODUCTS & SERVICES: <i>WHAT WE OFFER AND HOW IT SETS US APART</i>			
	IT'S GREAT	IT NEEDS WORK	IT DOESN'T EXIST
Product/service training			
Product/service positioning			
Marketing strategy			

OPERATIONS: <i>HOW AND WHY WE DO WHAT WE DO SO WELL</i>			
	IT'S GREAT	IT NEEDS WORK	IT DOESN'T EXIST
Processes			
Procedures			
Role safety			
Systems training (CRM, POS, and related tools)			

INDUSTRY INTRODUCTION: <i>ADDING CONTEXT TO A NEW HIRE'S ROLE</i>			
	IT'S GREAT	IT NEEDS WORK	IT DOESN'T EXIST
Partners and players we work with			
Competition: Who are they?			
Competitive product knowledge			

**1:1 CHECKPOINTS: REINFORCE. VALIDATE. STAY ON-MESSAGE.**

	IT'S GREAT	IT NEEDS WORK	IT DOESN'T EXIST
Managerial one-on-ones (i.e. daily check-ins, weekly meetings, monthly deep dives)			
Team meetings: align departmental goals			
Reinforce messaging: regular reminders offset memory lapses			
Assign a mentor: foster career growth through human connections			
Keep it social: continuously share and clarify company values and expectations			

**MEASURE EFFECTIVENESS OF ONBOARDING: IDENTIFY IMPROVEMENT OPPORTUNITIES**

	IT'S GREAT	IT NEEDS WORK	IT DOESN'T EXIST
Contrast performance/contributions of on-boarded vs. nonboarded employees			
Track employee turnover rate			
Benchmark productivity milestones			
Measure employee engagement			
Assess: Request new hire's first-hand review of onboarding program at various times (30, 60, 90 days, one year, etc.)			

Your total score is \_\_\_\_\_

So, is your onboarding program leading the pack, looking for a gardener, or a pioneer's dream? Find out what your score means on the next page.

# YOUR RESULTS

If you'd like to discuss your results or ways to level up your onboarding program, please reach out to us at [hello@unboxedtech.com](mailto:hello@unboxedtech.com)

## 40-70

### A Pioneer's Dream



#### A Pioneer's Dream

You've identified a lot of opportunities for your onboarding program. The great news is when it comes to creating a modern training programs, sometimes it's easier to start from the ground up. Start with building a roadmap and gaining buy-in from key stakeholders.

#### How We Can Help

We can help you design an onboarding training program that gives your team the knowledge, skills, and behaviors they need to get results. Bonus: we'll even help align your stakeholders.

Already have a strategy? We can support your content development and help you get it done in time for launch.

## 71-100

### Gardeners Wanted



#### Gardeners Wanted

You've identified some gaps and areas for improvement in your onboarding program, so now you can start pruning and planting some new training seeds. Time to ask yourself where you can get some quick wins as well as where the training will have the greatest impact.

#### How We Can Help

You might benefit from a workshop. It's a service we offer to learning & development leaders who need a game plan to get their program on the right track. We'll review what you have today, understand what you want to change, and help you decide what to do next.

## 101-130

### Leading the Pack



#### Leading the Pack

Congratulations! Your onboarding program is robust and leading the pack! Now it's time to optimize to make it even better by asking yourself: Are the delivery methods working well? Do team members need refresher training on past topics? How effectively am I measuring the impact this has on our company?

#### How We Can Help

Modern onboarding training is bite-sized and mobile-friendly rather than just event-based. It's also tailored to your unique challenges. We provide custom-built, self-paced microlearning that blends into the flow of work (even when you're new). If any of your content or delivery methods need a reboot, we're here to help.

#### LET'S GET STARTED

Ready to transform your onboarding?  
Contact us to schedule a demo.

UNBOXEDTECH.COM

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