

Onboarding Success Cheat Sheet

Employees Want to Know but Might not Ask

- Dress code specifics and work hours.
- Transportation, parking garage passes, garage hours, and expense.
- Restroom locations, lunch logistics, private rooms, meeting rooms, and conference room availability.
- The company's benefit details: medical plans, dental coverage, 401K policy, benefit's start date, PTO, vacation time, and holidays.
- Office supplies needed that have not already been pre-ordered.

Make a Personal Connection

- Roll out the red carpet and provide lunch on the new hire's first day.
- Your new hire's birthday and start date are two important dates to remember. Immediately jot these down in your calendar. There's nothing more embarrassing than forgetting these special dates.
- Play tour guide (again) and make sure to take the scenic route. Show off the private conference rooms, cubical banks, offices, lunch room, coffee bar, and snack closet while making plenty of introductions along the way.
- Personalization is a small detail that makes a large impact. Decorate his desk with a huge welcome sign. There's nothing more exciting than a warm welcome to ensure your new hire feels the love!
- Team integration is essential. Encourage coworkers to make themselves available to answer questions and provide support.
- Lookout for your new hire and assign a mentor. As a newbie, it's always nice to have a 'go-to person to brainstorm with.
- Schedule the photographer and send out hiring announcements. Include your new hire's bio. On your new hire's first day, take snapshots of the team and post them on the company's 'New Hire Hall of Fame.' Save an extra photo to frame and give to your new hire on his one-year anniversary.

Technology Access, Work Tools & Training

- Access to email, intranet, and employee contacts.
- Computer, laptop, printer, home office equipment, shared drives, and applications.
- Phone and cell phone.
- CRM, database, and additional asset authorization.
- Elevator and building ID badges.
- Building and bathroom codes, parking garage passes.
- Schedule training: CRM, technology/products, proprietary technology, sales, human resources, onboarding and more.

Sales Specific Items

- Schedule and review sales performance targets, goals, and expectations.
- Give the overview concerning: lead generation, contracts, pricing, sales operations, proposals, and territory lists.
- Explain and clarify expense-reporting policy including reporting format, budgets, and due dates. Review cell phone, travel, mileage, dinners, entertainment, hotel rooms, parking, flights, and other common items.
- Work through detailed compensation scenarios, commission payment schedules, and earnings expectations.
- Discuss company values, culture, and norms.
- Spell out your communication preferences including how you like to communicate, how often, and the best way to reach you. Think frequency, mode, and method.
- Review inner-office communication, internal access to resources, navigation, and communication styles between departments.