

Employee Onboarding

Cheat Sheet

Onboarding Basics

Employee onboarding is a key process that helps new hires feel welcomed, understand their responsibilities, and become part of the company culture. It's the starting point that sets them up for long-term success.



A strong start encourages employees to stay

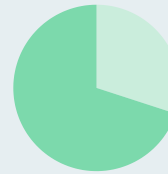


Clear guidance helps them contribute faster

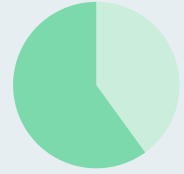


Feeling valued leads to higher motivation

Onboarding statistics you should know



70% of employees decide if a job is right for them within the first month.



60% of employees report feeling disoriented after their last onboarding experience.

Phases of Onboarding

Onboarding isn't a one-day event—it's a phased journey that takes new hires from offer acceptance to full productivity. Here are the 4 key phases that guide the process:

Orientation vs. Onboarding

Orientation

One-day introduction to company policies, & procedures.



Onboarding

Takes weeks or months and focuses on role training and culture fit.

✓ Pre-boarding

The journey begins as soon as the candidate says yes. Start preparing their onboarding experience right away.

✓ Orientation

Warmly welcome them to the company, introduce the unique culture, and help them get familiar with the team and workplace environment.

✓ Training

Thoroughly teach essential tools, core processes, and clear expectations so they can start contributing with confidence and clarity.

✓ Transition

Guide them into their role by teaching essential tools, processes, and expectations so they can contribute with confidence.

The First Day

The first day shapes how a new hire feels about your company. A thoughtful, well-planned welcome builds confidence, sets the tone for strong engagement. Here's how to make it count.



Create a Warm Welcome

Greet the new hire personally and leave a welcome pack and helpful resources on their desk.



Introduce the Team

Arrange a casual team lunch and quick meet-and-greets with key people.



Prepare Their Space

Ensure their desk is set up with the right technology and supplies they'll need to get started.



Share What They Need to Know

Prepare all required forms in advance, such as contracts, tax documents, and benefits enrollment.



Connect Them to Company Culture

Prepare all required forms in advance, such as contracts, tax documents, and benefits enrollment.

Training and Development

Why Does New Hire Training Matter?



Setting the tone for growth by encouraging new hires to stay curious and keep learning beyond their first week.

- ✓ Builds job-ready skills
- ✓ Improves speed & accuracy
- ✓ Ensures compliance
- ✓ Boosts confidence & morale

Training is essential to onboarding, helping new hires understand their role, expectations, and key protocols. Here's how a structured plan supports that:

- 01** Focus on what they need to succeed in their position.
- 02** Set clear expectations so they understand what success looks like from the start.
- 03** Make the training engaging by using interactive sessions to boost understanding.
- 04** Assign a mentor who can provide support.
- 05** Provide regular feedback to keep them growing and improving.

Integrating into Company Culture

A strong **onboarding** helps new hires feel welcome, aligned, and confident. Without it, burnout and early turnover are likely. Here are key ways to build culture from day one.



Smooth Interview-to-Onboarding

Use the offer letter to reflect your culture and give new hires a feel for your team and work style.



Share Core Values

Introduce your company's values early so new hires understand what drives your culture and decisions.



Connect Roles to Your Mission

Connect Roles to Your Mission
Help new hires see how their work supports the mission and why every role matters.



Promote Work-Life Balance

Be clear about expectations, support flexibility, and lead by example to reduce stress and prevent burnout.



Track Engagement

Regularly gather feedback and measure satisfaction to keep morale high and retention strong

Remember: Onboarding is your first opportunity to live your culture—make it clear, welcoming, and purposeful from day one.

HR Policies and Procedures

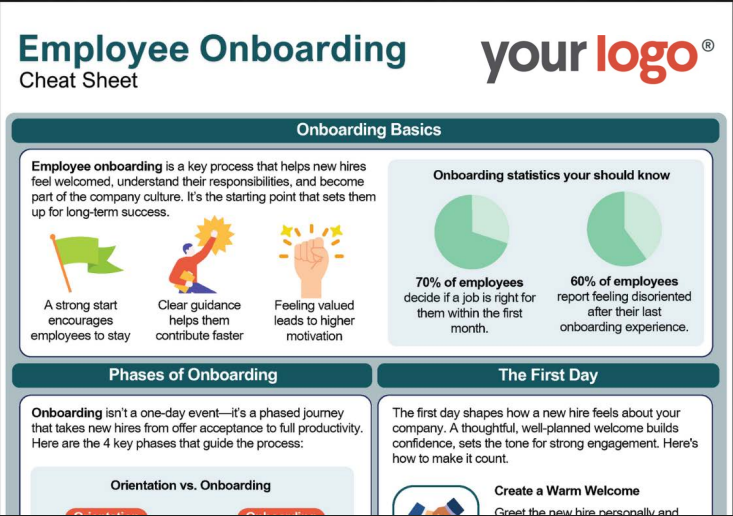
Clear HR policies during onboarding protect your company legally, set expectations early, and make new hires feel safe, informed, and confident.



56%

of new hires say they want HR policies clearly explained during onboarding, not just handed to them in a handbook.

- **Preboarding**
Send the offer letter, contracts, and essential policies before Day 1.
- **Company Policies**
Provide the employee handbook and require acknowledgment of key rules.
- **Compliance Training**
Complete mandatory training on harassment, cybersecurity, and company ethics.
- **Workplace Rules**
Explain dress code, safety standards, remote work guidelines, and IT use.
- **Benefits & Pay**
Set up payroll, benefits enrollment, and explain employee rights clearly.



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- Personal Growth
- Well-Being
- Work/Life Balance

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- Harassment
- Safety
- Security

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- Diversity
- U.S. Citizenship

Fewer Tools. Lower Costs. Smarter Training.

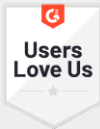
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