

Onboarding Toolkit

[Get started >](#)



Welcoming your new hire to



We all know the importance of making a good first impression. At ContractRecruiter.com, we aim to give all our new hires the best impression we can – one that is inviting, informative, and helps build excitement for what's to come.

YOUR ROLE

Create engagement:

Provide your new hire with a positive and effective onboarding experience from the moment they accept the offer to work at ContractRecruiter.com

Ensure everyone gets the

same great start: You are responsible for making sure the onboarding process is consistent for all our new joiners, regardless of what role they are coming into or the department they are joining.

Set them up for success:

Make sure they have access and logins to the tools they need, as well as the training and job aids they can use to deliver some quick wins for the team.





Your new hire's Onboarding Journey

1

Pre-hire

- Interview process
- Offer extended

2

Onboarding

- Offer letter extended
- New hire receives a series of welcome emails to keep them engaged and informed on next steps
- HR paperwork (payroll, legal doc) completed
- IT tasks (email, logins)

3

Orientation & Training

- Completes orientation and tools training online
- Meets with their delivery manager
- Meets the team
- Meets the client

4

Integrate

- Internal and client-specific expectations are established
- New hire begins work

5

Achieve

- Feedback meetings with client/delivery manager
- New hire completes onboarding survey

While you are supporting your new hire from “behind the scenes” to get them ready for their first day, the new hire is also going through a series of steps to prepare to be successful in their new role.



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The Onboarding Checklist

These are the steps we take to ensure each ContractRecruiter.com hire has a successful start:



Onboarding notification

- Alerts the support group there is a new hire so HR can initiate legal/paperwork processes.



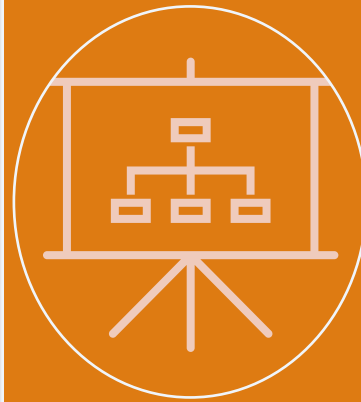
HR Onboarding Paperwork

- Legal documents are submitted/signed; start date determined



IT Setup

- Email and tools/login access



LMS Access

- Online orientation and tools training



Team Introductions

- The new hire is welcomed to the team, meets the client and has their first one-on-one



Onboarding Follow-Up

- Post onboarding survey is sent





New Hire Notification



- ✓ Enter the new hire's information into the CR Onboarding spreadsheet. Make sure all fields are entered, including personal email and start date.

CR Onboarding Spreadsheet

- ✓ Create a Flock post in the CR Onboarding group alerting everyone that a new hire has been added to the spreadsheet. Then, send an email to the onboarding group. This will trigger further action by HR.

Send email

The hiring manager is responsible for completing these tasks. Once the onboarding group is notified there is a new hire, HR will initiate the necessary onboarding steps listed in the next section.





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HR Onboarding



HR is responsible for completing these tasks. Once the onboarding group is notified that these tasks have been completed, then IT support can complete the steps listed in the IT Setup section.



- ✓ Add the new hire to SendGrid to initiate the welcome email campaign. Use their personal email address.

[Log into SendGrid](#)

- ✓ Send the employment agreement, nondisclosure, and any other legal documents required by the client (if applicable). Use their personal email address.

[Welcome email template](#)

- ✓ Payroll setup email is sent to the new hire's personal email.
- ✓ User is added to T-Sheets time-tracker (If applicable; this can vary by client).

[Login to T-Sheets](#)

- ✓ Confirmation email is sent to onboarding group with the subject "HR Onboarding complete for [name]." Please confirm that all the above steps have been completed.

[Send email](#)





IT Setup



- ✓ Provide the new hire with a work email address.
- ✓ Create a Calendly account.
- ✓ Add the new hire to the company distribution list. If they are going to help with onboarding, be sure to add them to that distribution list as well.
- ✓ O365 is configured; assistance provided with mobile setup as well.
- ✓ Work signature is configured, including their Calendly link.
- ✓ New hire is added to the company messaging application.
- ✓ New hire is provided with a ZipRecruiter and Indeed login (if applicable; check the [CR Onboarding sheet](#) if clarification is needed or reach out to the hiring manager).
- ✓ Confirmation email is sent to the onboarding group with the subject "IT setup completed for [name]. Be sure to provide the name of the new hire, their company email address you provided, and any notes for the team.

[Send email](#)

IT is responsible for completing these tasks. Once the onboarding group is notified that these tasks have been completed, then the Talent Engagement Specialist can complete the steps in the LMS Access instructions in the next section.





LMS Access



- ✓ Add the new hire as a user to the LMS. Be sure to assign them to the correct learner group.

[Go to LMS](#)

- ✓ Enroll the new hire into courses for tools they will be using for their assignment.
- ✓ Be sure to check that the new hire has successfully logged into the learning platform. Reach out via email if the new hire has not accessed the LMS within 2 days of receiving the invitation.
- ✓ To access the job aid for the LMS, click the link below. For more comprehensive refresher training, login to the LMS and search for "Admin training."
- ✓ Send an email to onboarding support with the subject "Training Assigned to [name]." Be sure to include the learning group you assigned to the new hire and any courses you enrolled them into.

[LMS Job Aid](#)

The Talent Engagement Specialist is responsible for completing these tasks. Once the onboarding group is notified that these tasks have been completed, then the Delivery Manager can complete the steps listed in the Team Introductions section.





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Team Introductions

Delivery Manager New Hire First Meeting

Dear [Name],

Welcome!

We're all very excited to have you onboard. To kick off your onboarding here at ContractRecruiter.com, I have scheduled some time for us to sit down and talk during your first days. You should have a meeting invitation in your inbox along with this email, but if not please follow up with me directly. Alongside getting to know each other a bit better, we'll also be going through your onboarding plan and discuss what your next few weeks and months will look like.

Please let me know if you have any questions. I look forward to catching up.

Best wishes,
[name]



The Delivery Manager is responsible for completing introductions.

Getting Started:

Think back to your first day as a new hire. How did it feel? Were you nervous? Excited? Terrified? Your new hire will be coming into a new environment and is no doubt going to experience moments of excitement, but also moments of uncertainty. They may feel a bit overwhelmed.

What can you do to make it easier?

The most important thing during this time is that your new hire feels welcome, and that they can see you were prepared for their arrival. It's now up to you to introduce your new hire to colleagues and stakeholders and support them through their onboarding journey.





Team Introductions

New Hire Announcement Template

Hello Team,

I am delighted to announce that ____ has joined ContractRecruiter.com as a [title], effective [date]. ____ will report to me and be a member of the [name] team. _____ will be responsible for [short description of role responsibilities]. [He/She/They] are based out of [state]

____ brings over [number] years of experience in the [relevant area of expertise].

Prior to ContractRecruiter.com, [name] held [relevant roles] at [company name].

Optional: ____ is also active in [charity/organization] and enjoys [hobbies] in their free time. Please join me in welcoming [name] to the team and wishing him/her/them success in their new role.



What they're doing:

- Completing online Orientation
- Receiving a new hire guide (counterpart to this guide)
- Learning ContractRecruiter.com systems and tools

Manager Checklist:

- ☐ Day one zoom meeting
- ☐ Week One meeting invitation for objective setting
- ☐ Confirm any client meetings
- ☐ Confirm any one-on-one's with team members
- ☐ Make sure technology/access is working
- ☐ Provide application logins as needed

Setting Up Quick Wins:

1. Explain the importance of completing online orientation and training.
2. Provide a time-based mission. This is a short-term goal that is easily achievable, but also provides practice with important ContractRecruiter.com systems or tools.





New Hire Survey

Did You Know?

- Nearly 33% of new hires look for a new job within their first six months on the job. (Among Millennials, that percentage is even higher...and it happens earlier).
- 23% of new hires turn over before their first anniversary.
- The organizational costs of employee turnover are estimated to range between 100% and 300% of the replaced employee's salary.
- It typically takes eight months for a newly hired employee to reach full productivity.

- ✓ The new hire should automatically receive a link to the survey to their personal email two weeks after being entered into Sendgrid.

[View the survey](#)

- ✓ You can check the onboarding survey results and use these surveys to assess and improve the onboarding experience you create for your new hires.

[View survey responses](#)



Resources

Resources

Report: [10 Employee Onboarding Statistics you must know](#)

Article: [How leaders can build connection in a Disconnected Workplace](#)

Podcast: [Take Control of your Onboarding](#)

Manager support: [First meeting Agenda](#)

Template Resource Center

- [Welcome to ContractRecruiter.com email template](#)
- [Manager New Hire First email template](#)
- [New hire announcement template](#)

Helping new hires excel beyond the onboarding process:

You are responsible for helping your new hire to understand their team, individual, and organizational objectives, as well as the overall management. Talk to your new hire about their objectives for their ongoing development and check in with them going forward.

Did you know?

Research into onboarding has shown that in many cases, new hires feel that their supervisor support declines 6-12 months after they start, which leads to less role clarity and lower rates of job satisfaction. Make sure your new hire knows you will be there to support them throughout their development.





New Hire Welcome Email

New Hire Welcome Email Template

Dear [Name],

On behalf of the entire team, I wish you a warm welcome to ContractRecruiter.com.

We are pleased that you have decided to join our team. We hope you will find many exciting opportunities and challenges in your new position, and we look forward to working with you.

To give you the best possible start in your new position, we've included a new hire informational packet for you with this email. This should help start to orient you to your team as well as ContractRecruiter.com as a company.

Position:

Rate:

Start Date:

Next Steps:

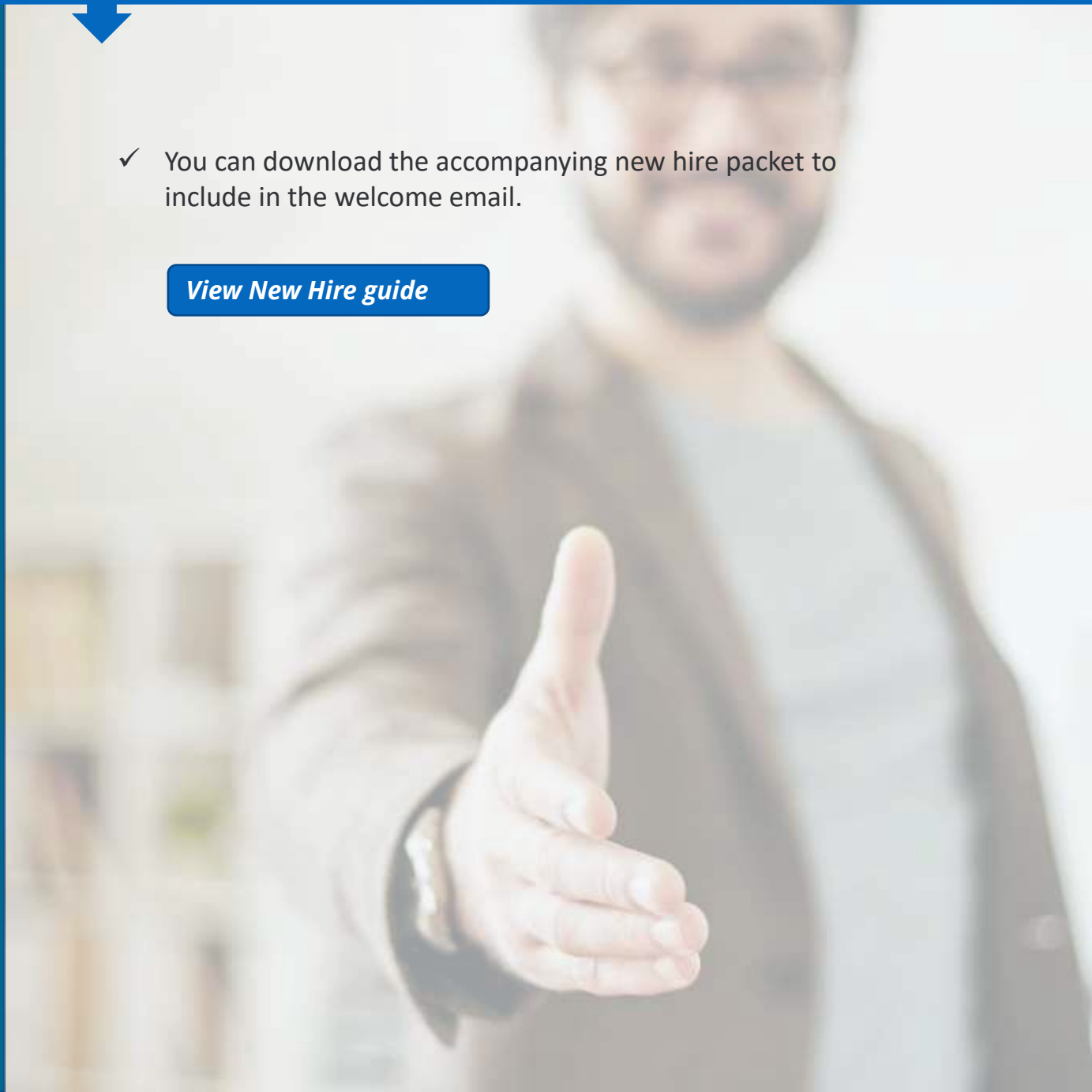
Once again, welcome aboard!

Sincerely,



- ✓ You can download the accompanying new hire packet to include in the welcome email.

[View New Hire guide](#)





Manager Support: First Meeting Agenda



THE AGENDA:

Date of meeting:

Time:

1. Introduction and check in- how is everything so far?
2. Review the onboarding plan:
 1. How is the online orientation and training going?
 2. Provide additional explanations of systems and processes.
3. Identify key internal stakeholders.
4. Explain the calendar and any upcoming meetings.
5. Set a plan for when and how you will meet over the next few weeks.
6. Run through any action points you've agreed to and confirm relevant due dates.
7. Review client-specific processes.
8. Answer any questions related to pay and timekeeping.

