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The Ultimate Guide to the Employee Cycle

Best practices and checklists for pre-onboarding, onboarding and offboarding

Onboarding is a recurring topic. And one that has not yet been fully mastered. We put together an onboarding "checklist" for you in the past - now, however, we really have enhanced the first version of the e-book. In this guide you will find advice and hints, specific examples, instructions, and the ultimate checklists, running from pre-onboarding to offboarding.

This e-book is packed with the very best we have taken from practice, the things that helped us and will hopefully help you too. We would be delighted if you were to give us your feedback, so that we can go on to produce something even better. 😊

Míša   Milan

What will you find in the e-book?

→   We explain why to do pre-onboarding, and how.

→   We recommend the best pre-onboarding activities.

→   Alongside our checklists, we will let you in on 5 extra steps to take to reach "onboarding heaven".

→   We explain what a "30/60/90" onboarding plan is, and advise you on how to put one together.

→   We also look at the cost of an employee who "isn't working out" after a couple of months at the company.

→   And we explain 3 good reasons not to forget offboarding.

→   At the end of the e-book, you will find the ultimate checklist for pre-onboarding, onboarding, and offboarding.

Go ahead! ↓

Pre-onboarding

We have no doubt that 99% of HR professionals are now familiar with the term pre-onboarding. Hand-on-heart, though - when did you first encounter the term? And how many of you give it concept-based attention? Not to worry if you answered that you don't take a concept-based approach to pre-onboarding - we're not planning to cast you down to HR hell. You're certainly not alone. So let's start by briefly explaining why we should deal with it in the first place. Not forgetting a couple of tricks in going about it all.

Why do pre-onboarding?

Not every HR professional will want to share the number of people who don't join up even after accepting the offer to do so. The number, however, is not likely to be negligible. You can imagine it yourself. You have been thinking for ages whether to accept an offer at all, because perhaps your current job isn't really that bad. Perhaps they even offered you more money. But, in short, you have taken the difficult decision to change jobs. You hand in your notice. And, unfortunately, you can't leave "by agreement" on a date that would suit you. You have a two-month period of notice to get through, and that's that. Essentially, almost three if you handed in your notice at the beginning of the month. How are you going to react if you've taken such a hard decision and someone else gets in touch, maybe on LinkedIn? Would you be open to that? You might as well listen to another offer, right? And the HR professional who worked so hard to convince you to make the change is left in tears because you end up taking something completely different.

> 🙏 **Try out a simple exercise.**
>
> Work out how much money and time your example case would cost. This is perhaps the best answer to the question of why to pay attention to pre-onboarding.

What activities can you do during pre-onboarding?

Communication is more than just a phrase - communication is the basis of everything. You can probably read this everywhere, and quite a few of you are by now possibly rolling your eyes. Why, though, do we still fail to pay it sufficient attention? And why, when it's the "best" piece of advice in all the handbooks, is communication from the employer still not enough? We can't answer that for you, because we don't understand it either; but think about it. Anyway - let's get down to the nitty-gritty. How can you communicate with future employees during the pre-onboarding period?

After your offer has been accepted, communicate with the newcomer about their situation

→ When a candidate accepts your offer but the start date is uncertain due to negotiations with their current employer, provide support and maintain communication. Assure the newcomer that you are available to help and offer advice if any issues arise. Recognize their stress about your continued interest despite the delayed start, and remain accessible throughout. This fosters a sense of security and collaboration from the beginning, strengthening the relationship to prevent them from seeking alternatives.

Prepare the newcomer for what they can expect in the nearest future

→ Letting a newcomer know what they can expect before taking up their duties, and when doing so, really should be your obligation or KPI. The newcomer should know what you will be communicating to them in the forthcoming period, and how, which documents you will need for them to come on board, and many other specific areas and information.

Bring the newcomer into the team and the corporate culture even before they begin

→ Although we do recommend talking about the corporate culture during the hiring process itself, this is also an indispensable part of pre-onboarding well done. Show your values, your company DNA, and everything that is a part of you as much as you can. Trust us that even when you think everyone knows all your values because you talk about them so often, the other side has only managed to remember or take in a fraction of it all.

HINT: How can you introduce the culture and team to a newcomer online?

🙏 Utilize platforms like Happenee to showcase your company's environment in 3D and have teams create welcome videos. Newcomers can explore values, company codex, and training to speed up onboarding. This streamlines the actual onboarding process.

Use a buddy system during pre-onboarding

→ Maximize engagement by assigning a pre-onboarding buddy who continues supporting the newcomer during onboarding. This fosters a sense of alignment and provides the newcomer with an early companion. Consider incentivizing the onboarding buddy with leaderboard points, company swag, or culture-related rewards.

Invite the newcomer to an event you are planning, and let them know who from the company speaks at conferences, for example

→ Do you and the team regularly go running together, for a beer, or anywhere else? Write to your future workmate to tell them you're planning on going somewhere, and ask them along. This is a great way of breaking down stress, which can be fairly restrictive in the first few days.

If you can manage at least one of these activities during pre-onboarding, trust us that you will be significantly reducing the risk of having to look at filling the vacancy again. 😊

Onboarding

Why "onboard" properly?

If you have paid proper attention to the pre-onboarding stage, onboarding itself should be a piece of cake, and a major relief to the newcomer. It still stands, though, that proper "onboarding" is key to ensuring that the newcomer adapts to their new working environment successfully and quickly.

If you don't manage the onboarding process, you increase the likelihood of the new person feeling left out, being frustrated from the very off. And that's the last thing you need.

Paying enough attention and time to onboarding can have long-term positive impacts on the whole organisation.

It increases productivity

→ Thanks to proper onboarding, new colleagues learn faster and are able to make a contribution to the work of the team quicker. When they know what's expected of them and what their tasks are, they really can begin working productively fast.

It reduces retention

→ When new workmates have a good feeling of the first few days and see that someone is taking an active interest in them, the higher the likelihood of them staying at the organisation long-term. By contrast, if they feel unwelcome or don't know what they're supposed to be doing, they will look for another job pretty soon. And they might look very slowly, without you having any idea ("quiet quitting").

It improves satisfaction and engagement

→ When newcomers see that their team is trying to make them feel welcome and when they have everything they need, their satisfaction and engagement will increase rapidly. Simply a good, fast start on all fronts.

It increases team performance

→ Properly onboarded newcomers are able to contribute to the work of the team quicker and increase its performance. And this is seen in the atmosphere within the team.

#noshee

The five steps to onboarding heaven

How, then, to properly onboard new colleagues? We have these five extra tips for you to accompany the whole checklist:

01

Fortis fortuna adiuvat – fortune favours the bold

Before you open the doors to your company to a newcomer, you need to be prepared for their arrival. No confusion, no surprises. The head can't cope with everything. To make your work easier, prepare the whole onboarding process as a template with which you can work with again and again, and clearly. Perhaps right here with us at Sloneek.

02

Harmonise what you expect of each other

All sides (the newcomer, HR, manager, and team) must have the same, clear idea of what is expected of the new colleague over the first weeks and months. Put together a 30/60/90 plan, containing a list of projects and tasks, deadlines and priorities. The plan should be flexible enough to allow the new workmate to adapt to the new environment and gain the required knowledge and skills.

03

Feedback is crucial

It might happen that, in spite of all efforts, there is uncertainty or confusion after the first days of work. Create space in which questions can be asked and feedback given. Include regular meetings with a superior, mentor, or buddy in the onboarding plan (30/60/90), so that the new colleague can ask about or get feedback on their performance. Remember, though, that there's **no replacement for a living, breathing person!** Meaning that dealing with this using a handbook for employees is not a good idea.

04

Above all, no isolation

Let the team swallow up the newcomer - quite literally. The more individual the position you are occupying, the greater the importance of allocating an internal mentor or "buddies". The newcomer cannot be allowed to remain alone during the first few months. This is the most critical part of the life cycle of a new colleague. And their leaving means considerable financial losses.

05

Appreciate

Recognize and appreciate new employees who quickly adapt and deliver results. This is especially crucial for Generation Z, as it motivates them, fosters a sense of belonging, and boosts engagement and loyalty. However, ensure that recognition is fair and transparent, based on performance rather than personal connections. Consistent and regular recognition is key to supporting employee growth and development.

What is a "30/60/90" onboarding plan?

An onboarding plan helps a newcomer integrate and find their feet in the role they are due to play at the company. It makes it easier to integrate newly-hired people within the work environment and helps them acquire the required skills and knowledge at greater speed. Objectives are divided into the first **30, 60, and 90** days of work and should be prepared as a template in advance. It is then enough for HR and the team leader to quickly review and add to the template as required before a newcomer comes on board.

How to put together a plan?

→ **Pull together all the objectives for a specific role**

Think about the objectives and the expectations made of a person in that particular role. Essentially, this is the same as what should already be written in the job description. Ideally, these objectives should be communicated to candidates in the selection process final round.

→ **Find key targets**

Identify the key objectives without which nobody would be able to move forward in the new role. Something like the key competencies/skills that the person in question needs so as to be able to handle the role.

→ **Consult the team**

Ask the team of which the new colleague will become a member for feedback. They might provide valuable ideas and feedback on how to help the new employee integrate in the team fast and carry out their tasks as quickly and effectively as possible.

→ **Set out a plan**

It's different strokes for different folks, of course, but we recommend using the OKR method ("Objectives, Key Results"). Set out the target areas ("Objectives") and match specific tasks to them ("Key Results") as leading to achievement of the main objective. Clearly and transparently, these lead the leader and the newcomer to know precisely where it is all going, what is missing, and where they might have got stuck.

→ **Set objectives for the first 30 days**

The first 30 days should focus on getting to know the company, the team, and work processes. The new employee should complete basic education and training, get to know their colleagues and superiors, and master the fundamental, but key areas associated with their role.

→ **Set objectives for the first 60 days**

Over the next 30 days, the new workmate should continue learning new skills and mastering existing tasks. They should start contributing to projects and team objectives and provide their contribution to the team, going into considerably more depth, with less assistance required from a manager or buddy.

Set objectives for the first 90 days

→ After the first 60 days, the new employee should now be well acquainted with the company, the team, and work processes. Over the last 30 days of the 90, the new employee should start planning their own projects and initiatives and presenting suggestions for improvements.

The onboarding stage in the life cycle of an employee can easily take 6 months, depending on the complexity of the position. It is not strictly limited to 90 days. Three months, however, is the time generally given to the legal aspects of employer protection, if the new colleague simply does not convince in the job.

Keeping an eye on the progress of the new employee is crucial in finding out how they are learning and getting on. Regular discussion with the new colleague and checking the completion of tasks can help determine whether they are sticking to the plan and continuing on the right path. It is important to remember that a 30/60/90 plan is not a strict step-by-step manual, but more of a directional framework for the new employee. The new employee should be able to adapt their plan to the needs of the team and the company, so as to achieve the best results.

What do you gain by using an onboarding plan?

Less stress and anxiety

→ A new employee can feel stressed and uncertain in a new work environment. An onboarding plan will help them find their way around the new company, get used to the new culture and people, and in turn reduce the level of anxiety and stress.

An improvement in productivity

→ If the new employee has a clear idea of what is expected of them and how they can contribute toward the success of the team and the company, they will feel greater motivation and be able to work more effectively.

Better ethic

→ A well-handled onboarding plan might have a positive impact on the employee ethic. If the new employee feels welcome and respected, this increases the sense of belonging and the motivation to work.

Lower employee fluctuation

→ If the new employee feels that they have your support and has a clear idea of their work duties and the possibilities for growth at the company, there is a higher likelihood they will stay with you for longer.

What is the cost of someone that "doesn't work out"?

Something that is often neglected is the cost involved in bringing a new member into the team. And how much it costs the company when the team leader lets the new person go right after the onboarding stage. The same stands for the recruitment manager, who needs to be aware that a poorly-selected candidate that makes it as far as the late stages of onboarding costs the company a fair amount of money if it ends up not working out.

A newcomer usually generates more costs than revenues before beginning to create genuine added value. Let's consider the example of a newcomer on a salary of €2,500 per month:

Total for 5 months at the company:

- 5 × €2,500 - salary
- 1 × €400 - recruitment ad
- 40 hours of work at HR on preparation and choosing the position (at €14 an hour, totaling €560)
- 20 hours of work for HR during onboarding (€196)
- 20 hours of work for the manager/buddy for onboarding (at €20 an hour, totaling €400)

Bill for 5 months: €12,656
That's how much the company loses (and has to earn) on someone who "doesn't work out".

**Save 20 hours a week
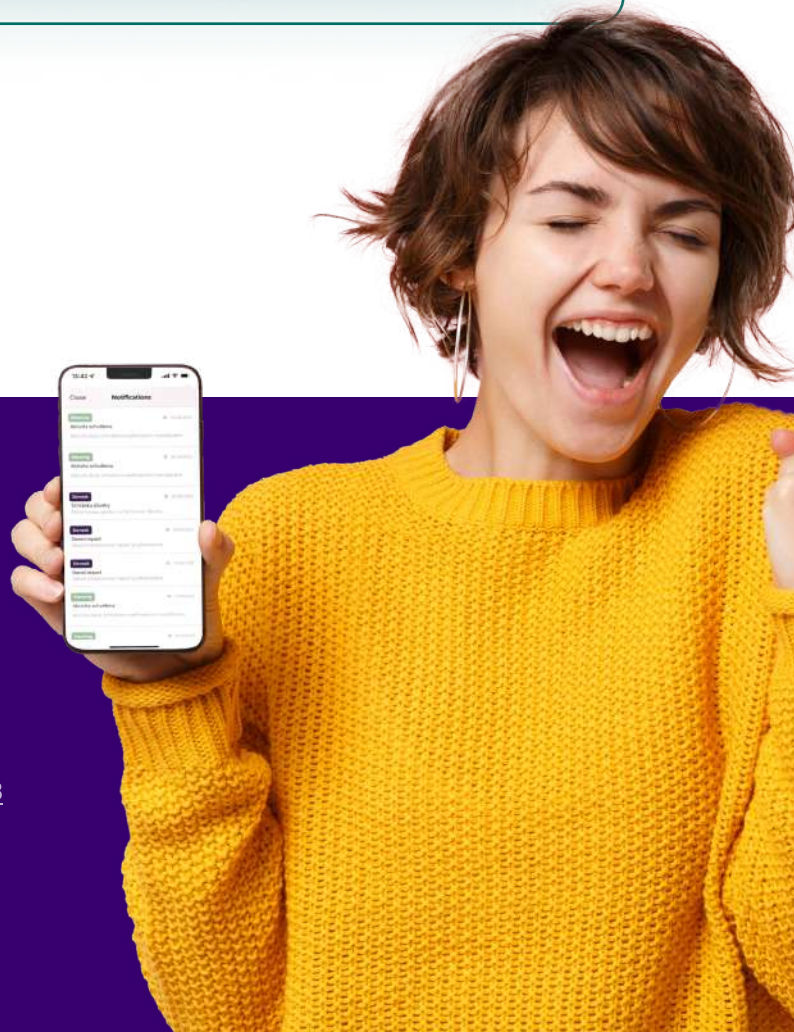on HR processes and operations
with Sloneek** 🐘

Offboarding

Offboarding is an important process for a company because it influences relations with outgoing colleagues and the mood among other employees, and impacts on the overall repute of the organisation. That's why it is a process that the organisation needs to manage properly. There are other reasons, of course.

→ **Keeping positive relations with an outgoing employee**

Offboarding enables a company to keep positive relations with an outgoing employee, irrespective of the "drama" that might play out when saying goodbye to the firm. One way or another, a constructive, respectful separation increases the likelihood that the outgoing employee will recommend the organisation to others, and perhaps even return as a customer or employee in the future. There is no point in lying, of course - sometimes it simply doesn't happen, even with the best will in the world.

→ **Ensuring data security**

The organisation must make sure that all important data and information are handled properly during the process of employee offboarding. This might involve removing access rights to information and access data from the departing employee. This helps prevent data leaks and ensures that information is protected at the organisation.

→ **Ensuring the continuity of work**

Important information which the outgoing employee has must be handled correctly and passed on to other employees, so as to minimise any disruption of work.

In light of this, it is important for the organisation to have a strong offboarding process in place for each employee who leaves the organisation. This helps keep relations with the outgoing employee positive, maintains the repute of the organisation, and ensures the protection of information and the continuity of work.

Ultimate checklists for working with incoming and outgoing employees

Pre-onboarding

- [ ] Welcome letter from the general director or company management, where appropriate the team leader `HR` `Team leader`

- [ ] Sending out a handbook for employees `HR`

- [ ] (If no handbook exists) Overview of the company and its culture `HR`

- [ ] (If no handbook exists) List of contacts `HR`

- [ ] (If no handbook exists) Information about the dress code, the code of conduct, working time, or other relevant principles in place at the company, and descriptions of corporate culture `HR`

- [ ] (If no handbook exists) Details of the onboarding process `HR`

- [ ] Request for documents needed to be able to sign the contract (if you do not have these from the recruitment process) `HR` `Newcomer`

- [ ] Sending out the employment contract for perusal before signing (plus a job description and salary statement) `HR`

- [ ] Preparing the contract for signing / signature of the responsible person at the company `HR`

- [ ] Preparing an e-mail address, access to the applications `HR` `IT`
  - Arranging a desk, chair, and sockets
  - Computer, keyboard, mouse, and monitor
  - Access to a printer and a scanner
  - Telephone with allocated in-house number
  - The required office supplies (pens, paper, stapler, etc.)

- [ ] Preparing a welcome pack `HR`

- [ ] Going for a medical examination `Newcomer`

- [ ] Preparing a file for the new colleague `HR`

Onboarding – the day of taking up duties

- ☐ Personal welcome — `HR` `Team leader`

- ☐ Introductory training and presentation of corporate culture, values, and organisation structure — `HR` `Team leader`

- ☐ Signing the contract — `HR`

- ☐ Familiarisation with company policy, channels of communication, and procedures (for example, attendance, holiday time, complaints) — `HR`

- ☐ Activation of work e-mail — `IT`

- ☐ Activation of access to required SW — `IT`

- ☐ Activation of user account in HRIS (Sloneek) — `HR`

- ☐ Confirmation of receiving equipment — `HR` `Newcomer` `IT`

- ☐ Confirmation of medical examination — `Newcomer`

- ☐ Training in occupational health and safety — `Newcomer`

- ☐ Discussion of expectations, role, and responsibilities of the new colleague — `Team leader`

- ☐ Meeting the team / team lunch — `Team leader`

- ☐ Announcement of new employee's arrival in the in-house communication system — `HR` `Team leader`

- ☐ Assembling legal and employment documentation in the new colleague's file — `HR`

- ☐ Introducing a mentor or buddy — `HR`

Onboarding

- [ ] Familiarisation with the 30/60/90 onboarding plan `Team leader`

- [ ] Familiarisation with internal systems and the SW used `Team leader` `Buddy`

- [ ] Plan of regular meetings with the leader `Team leader`

- [ ] Plan of work and communication with the mentor / buddy `Buddy`

- [ ] A "tour" of the company (specify / itemise in detail depending on the complexity of the company and the nature of the position) `Buddy`

- [ ] Training and familiarisation with the specific tools and procedures used within the team `Buddy`

- [ ] Education and development of skills `HR`
  - Explanation of the procedure involved in developmental activities
  - Allocation of a "skillset" competency model

- [ ] Involving the new employee in company events and social activities `HR` `Buddy`

- [ ] Evaluation and feedback after 30 days `HR` `Team leader` `Newcomer` `Buddy`

- [ ] Evaluation and feedback after 60 days `Team leader` `Newcomer` `Buddy`

- [ ] Evaluation and feedback after 90 days `Team leader` `Newcomer` `Buddy`

- [ ] Setting out objectives for the forthcoming evaluation period and the future development plan `Team leader` `Newcomer`

- [ ] Identifying and planning onward professional development and training according to needs and depending on an evaluation of competencies `Team leader` `Newcomer`

Offboarding

- [ ] Agreement on the date of departure `HR` `Team leader` `Employee`

- [ ] Informing the team and relevant departments `HR` `Team leader` `Employee`

- [ ] Handing over work and documentation: `HR` `Team leader` `Employee`
  - Inventory of ongoing projects and tasks
  - Handing over responsibilities and tasks
  - Handing over important documents, files, and information

- [ ] Appreciation and thanks : `HR` `Team leader`
  - Organising a leaving party or a team gathering
  - Personal thanks and expression of appreciation from the superior

- [ ] Cancelling access rights and checking security: `HR` `IT`
  - Removing access to systems, applications, and e-mail account
  - Closing / deactivating accounts in HRIS (Sloneek)
  - Cancelling access cards, keys, and all other authorisations
  - Removing passwords and login data for all company accounts and platforms
  - Checking the security of data and information once the employee has left

- [ ] Final administrative steps: `HR` `Employee`
  - Preparing exit documentation
  - Dealing with final settlements, including pay, bonuses, and holidays
  - Cancellation of benefits and insurances
  - Signing and handing over the required documents, such as the employment contract, confirmation of employment, or record of termination

- [ ] Returning work equipment and all entrusted company property `HR` `Employee`

- [ ] Exit interview: `HR`
  - Planning and holding an exit interview with the outgoing employee
  - Getting feedback about work experiences, satisfaction, improvement, and proposals for change
  - Evaluating the information obtained and using it to improve the work environment and processes

- [ ] Staying in contact: `HR`
  - The offer of staying in contact via the company "alumni" programme or social networks
  - The offer of staying in contact

About the authors:

Without the practitioners, this e-book would not be half as good. Their perspective enriches the content with direct experience, ideas and tips. And the Sloneecs thank them very much for that. 🧡

Michaela Sekaninová | Founder of the FAE | Hroviny podcast

Míša works as People & Culture Officer, mostly in start-ups. On top of that, she has her own project - FAE - First Aid for Employees - has her own podcast - Hroviny - and organises HR F*ck Ups - It's OK to Make Mistakes. She has been in HR for 7 years now, her favourite topic teal organisations. She enjoys being involved in projects in which she has the chance to make HR that bit better, because she has her own "Better HR Dream". Her main experience comes in building HR at companies where there was none before her arrival, and she is therefore very close to defining what HR actually means to a company.

Milan Rataj | Customer Happiness Lead | Sloneek

Milan Rataj is an HR strategist, consultant, and the co-founder of HR start-up Sloneek. He was there at the birth of the iDovolenka holiday time application and for many years worked on major organisational changes and strategic HR consultancy for management. At Sloneek, he makes sure of customer care and is actively involved in the "evangelisation" of a competency-based model of employee development. He studied adult education and marketing, and has a doctorate in both fields. He also currently teaches at the Faculty of Education at Charles' University, Prague.

E-book creation

The e-book was created in collaboration with Sloneek. Sloneek is a modern HR system that includes everything you need to manage the entire journey of your workers.

- Records of workers
- Attendance system
- Absence management
- Activities and time tracking
- Documents and signing
- Working tools
- To-do lists

Schedule a demo