

CHECKLISTS FOR ONBOARDING



Stage 1: Checklist before the new team member arrives

Send an appointment letter

- Immediately after the conversation where the team member has accepted the role, confirm in writing/email that the new team member is accepting the position by sending an appointment letter that includes:
 - Specifics of the job description
 - Agreed upon salary
 - Start date
 - Specific information on the team member's direct supervisor
 - And a signature page or electronic signature option

Create and send a welcome email that includes:

- Welcome them to the team
- List their start day and time clearly
- Highlight a description of appropriate clothing / dress code
- Share the agenda for their first day
- Clarify what they need to bring with them for their first day of work (ID, proof of address, direct deposit information)
- Provide them with attachments of the paperwork, tax forms, signature pages, direct deposit information, etc. that they will need to provide
Examples include:
 - W-4 federal tax forms and Employment Eligibility Verification (Form I-9)
 - State tax withholding forms
 - Direct deposit or ACH deposit forms
 - Non-disclosure and or non-compete agreements
 - Alcohol and drug usage and / or testing consent agreements
- Attach the employee handbook and suggest they review it prior to their first day
 - Include the handbook acknowledgment form
- Let them know where to park if you have a specific location you prefer for them
- Confirm which building to report to and/or which door to come in

CHECKLISTS FOR ONBOARDING



Stage 1: Checklist before the new team member arrives *(continued)*

- Use a “fun facts sheet” that you have for each team member that you can use to help introduce them to the other team members

- **Provide information on the new team member to the current staff in-person and/or via email**
 - Include name, title, department, role, and experience
 - Share fun facts about the new member
 - Confirm the start date for the new person
 - Explain where the new person will be located
 - Review the first day schedule and encourage the team to welcome the new person when they arrive on their first day
 - Get a welcome card and have each staff member sign it

- **Prepare the workspace / workstation for the new team member**
 - Make sure all electronic equipment is set up and operating correctly
 - Provide a list of necessary login information and a guide for how to sign in, create passwords etc.
 - Ensure that keys / access cards / combinations for locks are on the desk or accessible
 - Have business cards, name tag, other specific identifying items created and on hand
 - Confirm that the area is neat and clean
 - Supply necessary pens, pencils, note pads, sticky notes and other important items for a smooth start
 - Collect “swag” (t-shirts, hats, mugs, pens, candy etc.) to have at their desk for the new team member to take with them their first day
 - Place a printed copy of the staff handbook on their desk so they can refer to it as necessary
 - Make sure the welcome card signed by all is placed on the desk or work location of the new person
 - Provide access to a directory of contacts



CHECKLISTS FOR ONBOARDING



Stage 1: Checklist before the new team member arrives *(continued)*

- **Establish the first-day schedule**
 - Be prepared to have a clear schedule for the direct supervisor or other key personnel involved in the first-day experience
 - Set up lunch for the new candidate and as many team members as possible. Check on the new candidate’s food preferences prior to finalizing the lunch plan
 - Appoint the “go-to person” for this new team member. That person is the go-to for any questions, concerns, or other information the new team member may need after they are welcomed and onsite
 - Share and confirm the first-day schedule with team members and supervisors
 - Confirm that Human Resources and Payroll (or whoever manages these duties for your dealership) have all the information they need for the new candidate to start on the assigned day and that they have time set aside if needed to meet with the new person to finalize details

- **Make sure to be available for text, calls or email questions from the new person, and let them know to reach out as often as they need to without concern.**

- **Call 1-2 days prior to the start date (and after the welcome email has been sent out) to go over the email for any questions and to ease any worries the new person may have**
 - Establish expectations for ongoing onboarding
 - Include opportunities to review the staff handbook
 - Provide time for discussion with leadership and the new team member regarding the dealership’s history and core values
 - Plan to re-interview the team member to determine where their education you will provide needs to begin. Do they have knowledge of boats? Do they have knowledge of the boating lifestyle? Do they have knowledge of your brand and the manufacturers you represent? What position specific knowledge do they need to acquire?
 - Create opportunities for the new team member to spend time with their colleagues
 - Establish and review individual and team goals, timelines and processes for support that will be shared with the new team member
 - Review customer service interactions and expectations
 - Explain how the dealership is important to your customers and their lives, to the employees, to the community and to the economy
 - Describe how “onboarding is ongoing.”



CHECKLISTS FOR ONBOARDING



Stage 2: Checklist the welcome and first day

- Greet the new person upon their arrival.**
 - Assist with introductions to the staff that are available at the start of the day.
 - Show where their belongings can be placed, either their desk or a general staff location for coats, etc.
 - Introduce them to their “go-to person” and have that “go-to” accompany the new team member (if not you) on the tour and explain where that person is located and how to contact that person.
 - Review their “main desk or location” and explain what is in their workstation, computer, printer, swag, signed card from staff, important office items, etc.

- Give them a tour of the facilities, introducing or re-introducing them to the employees in each area.**
 - Show them key areas and explain the general uses of each area.
 - Discuss their interaction or responsibilities as related to each area.
 - Ensure that safety precautions for each area are reviewed.

- Once you arrive at the location of the team member who handles payroll, benefits and other similar information, have the new team member provide any signature pages, identification or information still needed.**

- Set down with the new team member and discuss any questions they have since the tour and proceed with your “re-interview” to establish specific needs this new team member has. Perhaps use the job description for the position to provide specific details to discuss.**

- Return to their workstation area and give them some time to review their resources, login using their guide, and acquaint themselves with their email, communication systems and other tools. This is an opportunity for the “go-to person” to assist you and the new team member.**

- Establish a time the first day for the new member to sit with senior leaders to discuss the dealership’s history and core values.**

- Have lunch with “the gang.” This may be a day where lunch is extended to allow for more interaction and discussion with the new team member.**

- Provide more time for the new team member to work at their own site or with their specific team member to get comfortable both with their technology and their specific duties, remember you don’t want to overwhelm them on their first day.**





Stage 3: Checklist ongoing training

- **Schedule time with key mentor(s) to ensure the opportunity to gain in-depth understanding and training on all aspects of the position.**
 - Include time for tools, technology and systems learning. Schedule with internal staff or trainers from the technology companies.
 - Provide detailed checklists for daily and weekly tasks.

- **Review expectations and key responsibilities**

- **Develop and provide/schedule training and development opportunities for the new team member. Consider:**
 - Manufacturer training;
 - Technology training;
 - Other educational opportunities (associations, suppliers, etc.)

- **Assign small and manageable assignments**
 - Although you may have a pile of work for this new person, consider giving them time to get prepared for the work to come.
 - Find a balance between items that may be very simple or boring and those that are intense and dense.

- **Establish regular meeting time and check-ins.**
 - In some cases, 3 days, 3 weeks, and 3 months are where some companies suggest “bumps in the road” occur. Perhaps schedule check-ins at those key points.
 - Stick to the meeting schedule to provide consistency in feedback and interaction.
 - At the 30-, 60- and 90-day marks, make sure to set up a meeting to discuss progress and concerns.
 - Plan yearly or bi-annual “Stay Interviews” to provide a proactive approach to keeping employees by checking in on what will be needed to keep your good employees.
 - Stay interviews are a proactive approach to employee retention, focusing on understanding what motivates employees to continue working for your organization
 - The book, “Love ‘Em or Lose ‘Em: Getting Good People to Stay,” by Beverly Kaye and Sharon Jordan-Evans provides insights into what makes employees most likely to stay. Here are a few;
 - Exciting work and challenges;





Stage 3: Checklist ongoing training (*continued*)

- Career growth, learning and development;
- Fair pay;
- Supportive management and “good boss;”
- Pride in the organization, its mission, and its product(s);
 - It is noted that 91 percent of those that Evans and Kaye interviewed named one of the first two items in this list as the top reasons they stay.
- Some top questions to ask in the stay interview, according to [Mike Simpson](#)
 - What are your long-term career goals?
 - What about your job keeps you coming in every day?
 - If you had a chance to change one thing about your job, what would it be and why?

