

LIVE WORKSHOP WEEK

Day 6
Your Complete
Onboarding Prep Checklist

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Hi, we are
Suzanne & Barend

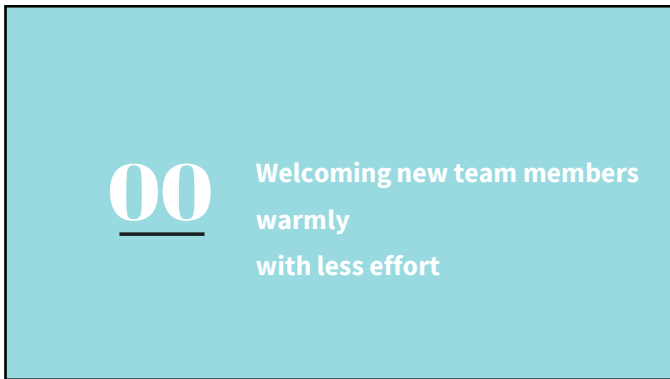
25+ years of experience in nonprofits
management & advisory roles
law degree

we join forces to help
nonprofits
professionalize
in HR & Labour Law



professor at
Leiden University
Labour Law

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OO Welcoming new team members
warmly
with less effort

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Live Workshop Week?

- › Productivity boost through joint work & shared focus on
- › **Standardizing your onboarding process and materials** for new team members (paid staff, volunteers, external contractors)
- › 6 days, 15-30 minutes work per day
- › **You will amaze yourself (and your team!)**

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What?

- › Onboarding handout worked out (DONE!)
- › Instructions for each onboarding prep step (DONE!)
- › Checklist including all actions needed to prepare warm & effective onboarding with your secret ingredient


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Limited availability

- › Live Workshop Week is all about getting it done now, sharing with peers now and having access to our expertise, knowledge, skills and insights now
- › 6 days → **Saturday 3 April is final day**
- › **Tuesday 6 April** all materials will go offline
- › No exceptions

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→ Let's continue and finalize!



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06

Your Complete Onboarding Prep Checklist

8

00

Your Complete Onboarding Prep Checklist

Use your list of issues & actions to make your own checklist with a timeline so that you can see at a glance what needs to be done when - and can tick off tasks when preparing for a new team member to arrive!

EXAMPLE
(ISSUE) Publish on team member on website
(Instruction)
We present our team members in our About Us section (link) on the website. We use headshots, two sentences of bio and one funny quote. Text must be max words maximum.
The web editor needs 3 days to find a moment to post it.
(Incremental of one example)
ACTIONS

- Write down instructions for photo size/quality or set up photo shoot (with your phone)
- Ask for a suitable photo
- Ask for the CV and a funny quote
- Write text of max words
- Ask approval from new team member
- Send to web editor

NO do this 3 days in advance of when you need it published!

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what is needed to welcome your new colleague?

On day 1, day 2 and day 3 you prepared your handout for your new colleague. You know what you need to explain to them. You know what they need. And you noticed things that needed to get done before they could follow instructions.

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what is needed to welcome your new colleague?

On day 4 you brainstormed and listed all things that need to be prepared to welcome a new team member. You wrote short instructions for each issue so that anyone can understand them.


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Welcome to your new colleague!

Yesterday you specified all the steps (actions) needed to implement the instructions and get the issue completed & ready for the new team member.


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Welcome to your new colleague!!!

Today, our final day together, you will use your list of issues & actions to make your own checklist **with a timeline** so that you can see at a glance what needs to be done when - and can tick of tasks when preparing for a new team member to arrive!


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issues for instance ...

- Contact info (telephone number, email address,...)
- Include in office mailing lists and address book
- Accounts & login info
- Workspace
- Business cards
- Publish as team member on website
- Register (insurance, pension, PAYE, etc.)
-

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instructions

Publish as team on website
 We present our team members in our About Us section (link) on the website. We use headshots, two sentences of bio and one funny quote. Text must be xxx words maximum.
 The web editor needs 3 days to find a moment to post it (screenshot of one example)

(Imagine that you tell someone else what needs to be done & how it should get done)

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actions


Actions for Publish as team member on website

- Write down instructions for photo size/quality or set up photo shoot (with your phone)
- Ask for a suitable photo
- Ask for the CV and a funny quote
- Write text of xxx words
- Ask approval from new team member
- Send to web editor

NB do this 3 days in advance of when you need it published!

(Imagine that you explain someone else all the steps they need to take to address the issue you identified and wrote an instruction for)

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checklist

Publish as team member on website

- Write down instructions for photo size/quality or set up photo shoot (with your phone)
-
- Add: time needed
- Add **timeline - countback**
- Make red the critical action deadline, in this case arrival new team member minus 3 days for web editor.

(Imagine this as a paper on your desk where you can scratch off tasks DONE! And know immediately what's next and when it needs to be completed)

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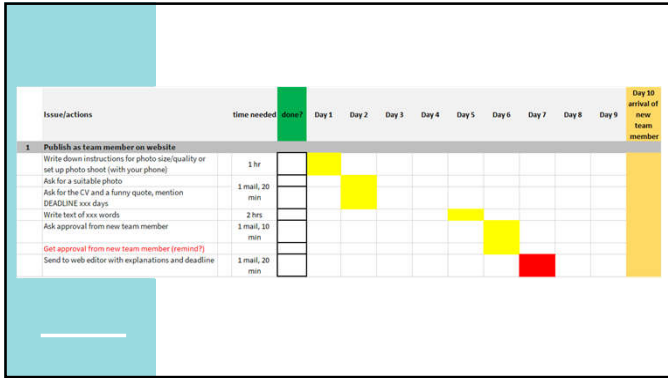


secret ingredient

= TIMELINE!

clarity on the **order & priority of things,** and the **planning** instead of just adding items to one long wish list

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what to do

- ✓ Go to the excel sheet or make a similar word document
- ✓ Copy your issues + actions
- ✓ Add: time needed.
- ✓ Add as many days as needed for the task that needs to start longest before arrival of the new team member

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what to do

- ✓ Mark cells according to when a task needs to be done
- ✓ Mark a critical path task red
- ✓ Check that this is clear & complete
- ✓ Note that one (part of a) task is already done

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celebrate

You did it!!! Now you have:

- A rough outline (or more) of your standardized handout for your new team member
- And overview of all issues that need to be addressed + instructions to standardize these tasks for onboarding preparation
- A checklist with a timeline for your standardized process

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Find your buddies in our Facebook group

Share a picture of your checklist, instructions and handouts!!!!

We are looking forward to seeing you there!

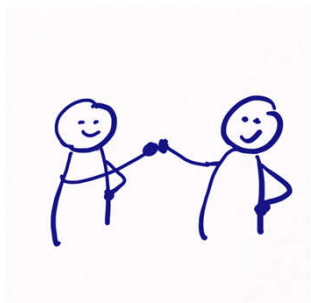
Suzanne & Barend

<https://www.facebook.com/groups/liveworkshopweekwarmwelcomewithlesseffort>

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Well done!

Let's catch up in our Facebook group!



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next steps

- Are you wondering how to continue?
- Keep an eye out on your inbox
