ONBOARDING

EXPERIENCE

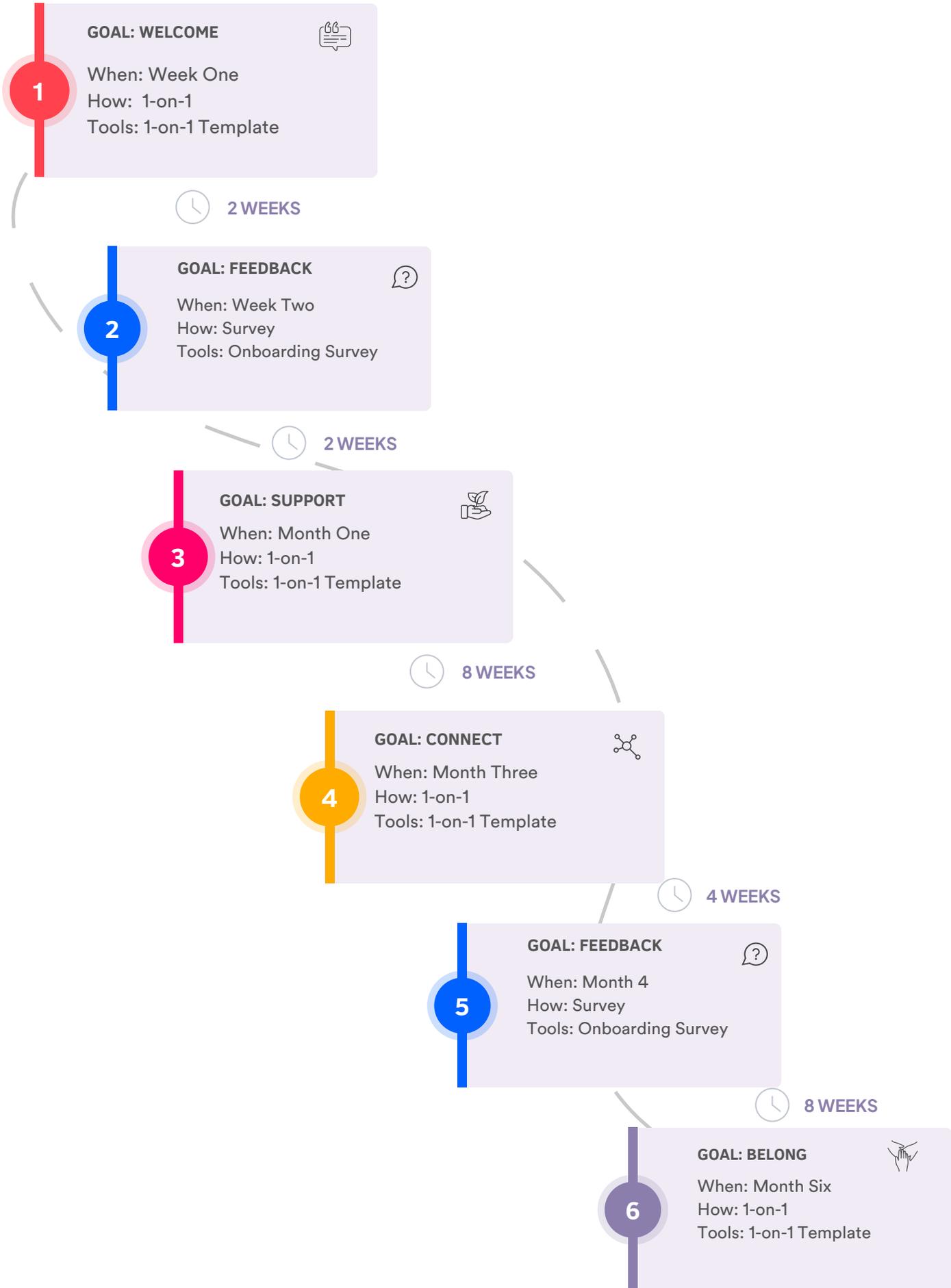## TEMPLATES

crewmojo

WELCOME TO

CREWMOJO

Enabling performance experiences to be designed and delivered in days not months.

Use these templates for inspiration or as a starting point for your own system. When you need to automate and scale the process, each template is ready to go in the Crewmojo platform.

Take a personal tour of Crewmojo.

ONBOARDING EXPERIENCE

GOAL: WELCOME

When: Week One
How: 1-on-1
Tools: 1-on-1 Template

1

⏱ 2 WEEKS

GOAL: FEEDBACK

When: Week Two
How: Survey
Tools: Onboarding Survey

2

⏱ 2 WEEKS

GOAL: SUPPORT

When: Month One
How: 1-on-1
Tools: 1-on-1 Template

3

⏱ 8 WEEKS

GOAL: CONNECT

When: Month Three
How: 1-on-1
Tools: 1-on-1 Template

4

⏱ 4 WEEKS

GOAL: FEEDBACK

When: Month 4
How: Survey
Tools: Onboarding Survey

5

⏱ 8 WEEKS

GOAL: BELONG

When: Month Six
How: 1-on-1
Tools: 1-on-1 Template

6

WEEK ONE
1-ON-1
TEMPLATE

→

WELCOME

Getting off to a flying start - we got this! We'll be covering a mixture of the company basics and making sure all the admin is sorted.

CHECKLIST

- ☐ I have booked in and/or attended new employee training
- ☐ I am set up with my computer and systems access
- ☐ I have met the rest of my team
- ☐ I have completed a 'user manual for me'
- ☐ We have scheduled a regular cadence for our 1-on-1s.
- ☐ I am comfortable getting my way around the building & can find what I need.

Any observations you would like to share that have struck you in your first days?

WEEK 2
ONBOARDING SURVEY
TEMPLATE

Welcome to the our Onboarding Survey.
We are keen to hear about your recruitment and onboarding experience as we are always seeking to make things better. We are particularly interested in how our candidate and new starter experience made you feel and would love your thoughts on what we missed or could do differently to make it top notch!

INITIAL CONTACT

How were you initially contacted or how did you enter our recruitment process?

○ Referral
○ Someone reached out to me on LinkedIn
○ Prior candidate
○ Applied via LinkedIn
○ Applied via website
○ Other

_____

Were you clear on the recruitment process upfront?

○ Yes
○ No
○ Other

_____

Prior to the first interview was the contact with the organisation sufficient and timely? If not, what was missing?

ONBOARDING EXPERIENCE

INITIAL CONTACT

What would be your preferred method of initial contact?

- ◯ Phone
- ◯ Email
- ◯ Text
- ◯ LinkedIn

How could we have improved the initial contact or reach out when we first connected with you?

INTERVIEW PROCESS

How many interviews and conversations did we have with you in the process? Was it too much or too little?

With each interview, did we provide adequate time with our team? What would be ideal for you?

INTERVIEW PROCESS

Was the timing between interviews sufficient or too long?

○ Sufficient
○ Too long
○ Other

_____

Were the interviews valuable and constructive?

Were you given sufficient time to ask questions and give feedback during each interview?

How can we improve the interview process for each candidate?

OFFER PROCESS

How quickly where you made an offer in the offer post final interview? ✎

- ◯ Same day
- ◯ The next day?
- ◯ Within a few days?
- ◯ Within 1 week?
- ◯ Within 2 weeks?
- ◯ Longer than two weeks?
- ◯ Not sure
- ◯ Other

Do you feel you received your contract for your new position promptly after your verbal offer? What is an ideal timeframe for you? ✎

Did the offer have the correct details and everything you needed? ✎

- ◯ Yes
- ◯ No
- ◯ Other

OFFER PROCESS

Were you easily able to contact us throughout your experience?

○ Yes

○ No

○ Other

_____

Did you receive all the information you needed about our organisation and your role during the offer process?

How can we improve our offer experience for future candidates?

MONTH ONE
1-ON-1
TEMPLATE

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Congratulations on Month 1

By now you should understand the organisation's goals, values & culture, and be getting to know your team. Reflect on what you have learnt. Share this with your manager, plus any areas you might like to focus on in the coming month.

Checklist

- ☐ I understand the organisation's mission
- ☐ I feel like I'm living the organisation's values
- ☐ I understand the key goals of the organisation for the year
- ☐ I've read about our customer personas
- ☐ Is there anything we've missed that might help you succeed?
- ☐ Ask your manager for feedback - things to stop, start or continue.
- ☐ Any observations you would like to share that have struck you in your first month?

NOTES

MONTH THREE
1–ON–1
TEMPLATE

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Congratulations on Month 3
Month 3 is a big milestone as you transition to execution mode. Keep the relationship building going and use your base knowledge to think about your contribution to team and organisation goals.

What challenges have you had to face thus far?

What skills or abilities need further development for you to be more successful?

What challenges have you had to face thus far?

Checklist

☐ I've had 1-on-1s with my teammates & other team members

☐ I understand my team goals and where I can make an impact

☐ I have an assignment I am working towards

☐ I've ensured I'm included in regular team meetings and other communication channels

☐ Ask your manager for feedback - things to stop, start or continue.

MONTH 4
ONBOARDING SURVEY
TEMPLATE

WE'RE LISTENING

We'd appreciate you sharing your insights into how we'veworked with you during your onboarding process.

ONBOARDING PROCESS

Were you provided with accurate information during the onboarding process? If no, what would you like to have received?

Did someone get in touch before your first day to let you know about start times etc?

Were you aware of what to expect on your first day?

○ Yes
○ No
○ Other

_____

Did you receive your laptop in time to set-up for your first day?

○ Yes
○ No
○ Other

_____

ONBOARDING EXPERIENCE

Were your systems setup and easy to access?

○ Yes
○ No
○ Other

_____

Did you find your onboarding pack useful? Is there anything not in your pack that would have been good to get?

Did someone connect with you on the morning of the first day and were you aware of what induction sessions you needed to attend?

What were your induction sessions like?

ONBOARDING EXPERIENCE

Did you have enough support during your onboarding process?
What else could we have done?

Were you told who your people guide was and did they connect with you? If so, how did that go?

Were any questions you had in your first day/week answered in detail and promptly?

◯ Yes

◯ No

◯ Other

_____

How were you onboarded to your first client and how did that go?

Do you have a clear understanding of our culture
and values as an organisation?

How can we improve our onboarding experience for
candidates in the future?

ONBOARDING EXPERIENCE

OVERALL

Has your experience of our organisation matched your expectations?

○ Yes
○ No
○ Other
_____

Do you have a good understanding of what's expected in your role?

○ Yes
○ No
○ Other
_____

Were there any aspects of the role, interviews, onboarding or our organisation that were unclear throughout the process that you had to ask for clarification on? Did we respond clearly and accurately?

What was your favourite part of the onboarding experience?

What was your least favourite part of the onboarding experience?

Would you recommend our organisation as a great place to work?

Do you have any further comments about your experience?

MONTH SIX
1-ON-1
TEMPLATE

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Another big milestone - Month 6

By now, you should be very much established in the organisation with good team relationships and making an impact with your work. Complete the quick pulse below, ready to discuss with your manager when you meet.

Describe your best week so far.

Describe your worst week so far.

Has the role been the same or different to what you expected?

How likely are you to recommend our organisation as great place to work?

What's one thing we should continue, start or stop over the next 6 months.

EXPLORE MORE

Building a world-class performance culture is made easy with our template library and pre-designed employee experiences.

Templates:
- One-on-one templates
- Performance review templates
- Role descriptions
- Goal templates
- Survey templates
- Engagement surveys
- and more

Experiences:
- Onboarding new employees
- Goal setting & alignment
- Growth plans & coaching
- Skill tracking & development
- Feedback & recognition
- Stay interviews
- Performance reviews
- Exit surveys & interviews
- and more

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