

BOKU University

# Onboarding Checklist

HR Development  
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## The importance of onboarding new employees

Professional onboarding is an important leadership responsibility that is, unfortunately often neglected in the day-to-day work. The first days with a new employer are filled with curiosity and motivation but also with uncertainty and a lack of routine. It is vital to help new colleagues get started and support them as they settle in at the university and in the immediate work environment within the department or service unit. Because once sufficient guidance is in place and the new workplace is set up, it becomes possible to focus on what matters most, the actual tasks and responsibilities.

What should a good onboarding process achieve?

- Introduction to the job: Knowledge of specific job duties and the requirements associated with them (quality)

- Introduction to the team: Getting to know new colleagues and learning about the division of tasks and responsibilities
- Introduction to the BOKU: Knowledge of key processes, important contacts and orientation within the building.<sup>1</sup>

## Systematic onboarding is an important leadership responsibility

With personnel responsibility comes the obligation to ensure a professional onboarding process for new employees. Anyone in a leadership position is advised to adopt a planned and systematic approach. It is therefore a good idea to consider in advance who can take on which tasks or roles during the onboarding process. A team member assigned to provide starting support can be very helpful with practical and social orientation during the first few weeks. In addition, a mentor, possibly from a partner department, can offer support as a buddy and help establish contacts within the university.

For practical purposes, the measures described in more detail below are recommended:

- Introduction and orientation meeting on the first day of work
- Welcome guide for practical and social orientation
- Set up an onboarding plan
- Continuous feedback during the onboarding period and a structured review at the end of the probationary month
- Appraisal interview at the end of the onboarding phase (no earlier than 3 months and no later than 6 months)

## Introduction and orientation meeting on the first day of work

On the first day of work, the immediate supervisor should not only welcome the new employee in person, but also conduct a thorough introductory and orientation meeting during which the new employee is informed of the following:

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<sup>1</sup>For an overview of the history, the fields of competence and the internal organization of BOKU, the welcome lecture is available to the new employees in the [BOKU Training pass](#).

- Department's placement in the university's organizational chart
- Defining the new employee's role within the team
- Responsibilities, requirements and expectations for the position
- Schedule for the first few days of work and overview of the introduction plan
- General conditions for the day-to-day work, such as rules regarding lunch and breaks, daily time tracking, and regular team meetings

During an introduction tour, the new employee should be personally introduced to their immediate colleagues.

**Give the new employee a feeling of "being welcome"!**

## Starting support for new employees

A person who serves as an onboarding mentor on the team is primarily responsible for the practical and social aspects of onboarding. They act as a direct point of contact and buddy during the first few weeks, thereby facilitating the onboarding process. The responsibilities of onboarding mentors may include:

- Provide spatial orientation at BOKU
- To bring BOKU's culture and "informal rules" closer
- Promote social integration
- Professional support for initial questions

Serving as a start mentor should be a voluntary decision, not an obligation; ideally, the role should rotate within the department. In any case, the time resources required for the start mentor role must be considered.

The following tasks cannot be delegated to the start mentor:

- Welcome and orientation meeting with the new employee
- Reflection meeting and feedback on work performance
- Preparation of the onboarding plan
- Creation of the job description

Responsibility for personnel and the authority to issue instructions always remain with the direct supervisor.

## The onboarding plan

In practice, compile possible tasks and work content for the first few weeks. A [template for an onboarding plan](#) can be found at the end of the document. Which colleagues can be helpful in which task and who can pass on which knowledge?

Be careful not to overwhelm new employees, but also not to underchallenge them. You should avoid the following negative strategies during the induction: In the "throw-in-the-deep water strategy", difficult tasks are immediately handed over with a high level of responsibility, but at the same time without instruction and without support. This can easily lead to a sense of failure and demotivation. In the "gentle strategy", simple tasks are assigned with generous time limits. The new employee is not very busy and there is no opportunity to prove themselves.

## Feedback and Employee Review

In the first few weeks, discussions between the new employee and the direct supervisor should be held more frequently than in the usual working day. These conversations can also take place spontaneously, without prior planning. They serve to get to know each other better and to provide professional feedback.

The supervisor can check in regularly to see how the onboarding is going and how the new employee is doing during the onboarding phase. The new employee can ask questions in between check-ins, even if they haven't specifically requested a meeting to do so. During these conversations, openly discuss what's going well and what could be improved.

- Conduct a **structured conversation at the end of the probationary period**. This should include specific feedback. The new employee should also have the opportunity to discuss their impressions and assessment of the new job so far.
- An [appraisal interview at the end of the onboarding period](#) solidify mutual expectations and clearly define tasks and goals. It is important to give new employees enough time to settle in. They cannot be expected to perform at full capacity right from the start. Experience shows that, depending on the tasks, this is realistic only after 3 to 6 months.

## And what if, in the end, you do end up separating?

Clearly address the reasons or seek feedback on the reasons for the resignation if the new employee wishes to resign.

Be aware that the reason for the separation may not lie solely with the employee, but could also stem from the employer (incorrect hiring decision, insufficient offers of support or communication, inadequate working conditions).

Handle the resignation process fairly and provide your employee with reasonable support. Structure the process in such a way that you can still look each other in the eye afterward.

## Onboarding Checklist

The following checklist is designed to help you onboard new employees. It covers three areas:

- **Before starting work**, all formalities related to the employment contract must be completed. Future colleagues are informed, the workspace is prepared, and, ideally, a mentor is assigned to the initial relevant work tasks and the necessary support for them.
- **On the first day of work**, following a personal welcome, [introductory and orientation meeting](#) takes place with the direct supervisor. The new employee is introduced to their coworkers and the [start mentor](#), and they are shown to their new workplace. Make the new employee feel „welcome“.
- **The onboarding period** lasts an average of 3 to 6 months. During this time, new employees require special attention, particularly from their direct supervisor, to ensure their professional training and social integration.

## Onboarding Checklist Template

|                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                     |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|
| Employee:                                                                                                                                                                                                                                                                                                                                                                                                                        |                                     |
| Start date:                                                                                                                                                                                                                                                                                                                                                                                                                      |                                     |
| Supervisor:                                                                                                                                                                                                                                                                                                                                                                                                                      |                                     |
| Start mentor:                                                                                                                                                                                                                                                                                                                                                                                                                    |                                     |
| <b>Task completed</b>                                                                                                                                                                                                                                                                                                                                                                                                            | <input checked="" type="checkbox"/> |
| <b>Before starting work</b>                                                                                                                                                                                                                                                                                                                                                                                                      |                                     |
| Completing employment contract formalities<br><input type="checkbox"/> Written justification for the selection of applicants<br><input type="checkbox"/> Desired start date<br><input type="checkbox"/> <a href="#">Job description</a><br><input type="checkbox"/> <a href="#">Work schedule / home office agreement</a><br>The documents must be sent to the Human Resources Department at least 2 weeks before starting work. | <input type="checkbox"/>            |
| Inform colleagues: Name, start date, function and tasks                                                                                                                                                                                                                                                                                                                                                                          | <input type="checkbox"/>            |
| Nominate a start mentor                                                                                                                                                                                                                                                                                                                                                                                                          | <input type="checkbox"/>            |
| Provide a workplace and order equipment<br><input type="checkbox"/> PC / Laptop<br><input type="checkbox"/> Telephone / mobile phone<br><input type="checkbox"/> Access and copy card (BOKUcard)<br><input type="checkbox"/> Keys (office, laboratory etc.)<br><input type="checkbox"/> Personal protective equipment (laboratory, field etc.)<br><input type="checkbox"/> Other:                                                | <input type="checkbox"/>            |
| Assign necessary permissions for the IT system                                                                                                                                                                                                                                                                                                                                                                                   | <input type="checkbox"/>            |
| Develop an <a href="#">onboarding plan</a>                                                                                                                                                                                                                                                                                                                                                                                       | <input type="checkbox"/>            |
| Other:                                                                                                                                                                                                                                                                                                                                                                                                                           | <input type="checkbox"/>            |
| <b>First day at work</b>                                                                                                                                                                                                                                                                                                                                                                                                         |                                     |
| Conduct an introductory and orientation meeting                                                                                                                                                                                                                                                                                                                                                                                  | <input type="checkbox"/>            |
| Tour of the department and meet colleagues, introduce the start mentor                                                                                                                                                                                                                                                                                                                                                           | <input type="checkbox"/>            |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                          |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| Adopt and countersign workplace and equipment                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <input type="checkbox"/> |
| Review access to IT systems, explain applications (time tracking, BOKUflow, etc.)                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <input type="checkbox"/> |
| Other:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <input type="checkbox"/> |
| <b>Introduction phase</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                          |
| Discuss the first steps, <a href="#">the onboarding plan</a> , projects and specific tasks                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <input type="checkbox"/> |
| Install and explain the necessary software                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <input type="checkbox"/> |
| Explain key work processes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <input type="checkbox"/> |
| <p>Highlight key policies</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> House rules</li> <li><input type="checkbox"/> General safety instructions</li> <li><input type="checkbox"/> Compliance</li> <li><input type="checkbox"/> Data protection</li> <li><input type="checkbox"/> Affiliation</li> <li><input type="checkbox"/> Other:</li> </ul> <p>The above provisions are to be confirmed as 'read' in the BOKU training pass. All other guidelines are available in the <a href="#">document collection</a>.</p> | <input type="checkbox"/> |
| Conduct personal safety briefing for laboratory / workshop                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <input type="checkbox"/> |
| <p>Register for relevant introductory events and training courses</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Welcome lecture – BOKU at a glance</li> <li><input type="checkbox"/> Introduction to teaching</li> <li><input type="checkbox"/> Other:</li> </ul> <p>Current dates and registration options can be found in the <a href="#">BOKU Training pass</a></p>                                                                                                                                                 | <input type="checkbox"/> |
| Update mailing list and organizational chart                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <input type="checkbox"/> |
| Provide information about important university contact persons and corporate design templates                                                                                                                                                                                                                                                                                                                                                                                                                                                | <input type="checkbox"/> |
| Guidance and feedback on the first assignments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <input type="checkbox"/> |
| Other (e.g. ordering business cards):                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <input type="checkbox"/> |
| <b>Feedback meeting at the end of the probationary period</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                          |
| <b>Employee appraisal after 3 to 6 months</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                          |

## Template Onboarding plan

| Task                                                                       | Know how                                                         | Support from                        | Completed by                                 |
|----------------------------------------------------------------------------|------------------------------------------------------------------|-------------------------------------|----------------------------------------------|
| <i>Document your first tasks and projects as specifically as possible.</i> | <i>What knowledge is needed? Where can information be found?</i> | <i>Who offers specific support?</i> | <i>By when should the task be completed?</i> |