***NOTICE****: The following has been provided by WBA committee and section volunteers for use by member banks.
It should be reviewed and revised as appropriate to the user-bank’s own policies, procedures, and practices.*

**Best Practices for Employee Onboarding**

The onboarding process should start one to two weeks before the employees start date and last for up to 12 months.

**Communicate Prior to Their First Day**

To lessen anxiety about starting a new job, begin communications early. Distribute a welcome letter that includes all the new employee paperwork so they can review, complete, and bring with them on their first day of employment. This would consist of their benefits package, including wages, payroll dates, payroll forms (W-4/I-9’s), PTO hours available, sick leave, insurance options, and 401K programs. Allow them time to ask questions in advance after reviewing.

In addition, communicate their expected work hours, where to park, and the company dress code so they are prepared for their arrival.

**New Hire Checklist**

Start this form early so the organization doesn’t miss any important steps. This checklist will vary by organization but is a very vital part of the onboarding process and keeps everyone involved on task.

**Send an Email Announcing the New Employee to All Staff**

Ask the new hire to supply a brief narrative about themselves to share with the staff. This could include information about their previous work experience, family life, hobbies, and anything else they would like to share. Employers would then email this announcement out, along with the start date, job title, and responsibilities of the new hire.

**Assign the New Hire a Peer Mentor**

The peer mentor would be someone other than the acting supervisor. This person would have good interpersonal skills and a strong knowledge of the organization’s history, core values, and its mission. The peer mentor would be a direct resource to the new employee for processes, procedures, and any other pertinent information a new hire would be interested in. This person would live and breathe your organizations brand with enthusiasm and positivity. The peer mentor would be assigned for up to 12 months.

**Greet the New Employee as They Enter the Facility and Direct Them to Their Workspace**

Acclimate them with their new work area. Go over any additional equipment they think they will need. Supply them with their new keys or access card and show them the enter/exit procedures of the building. You should share an organizational chart, employee directory, and facility map with them as well. You can also gift them a welcome package that would include branded items such as a piece of apparel, along with their new company nametag, and their business cards. This would then be followed by giving a tour of the facility, showing them the time clock, restrooms, and break room. You would then introduce the new hire to the rest of the staff, while showing them where each department is located.

**Have a Meet and Greet Scheduled for Lunch on the First Day**

Involve senior management and peers the new hire will be working with directly. This would be a question-and-answer session, while treating the employee to lunch in a more casual environment.

**Provide Training**

This is the time where you would share your banks history, culture, brand, core values, and mission with the new employee. You would show your welcome video and brand story. You can go over the employee handbook, along with pertinent policies and procedures. The employee would get training on programs and receive any network passwords they would need to begin performing their job duties independently. The new hire would learn the vendors the organization works with in regard to their specific position. This would include web addresses and login information.

**Schedule 30/60/90-Day, Six Month, and Annual Reviews**

Schedule reviews right away so the new hire and supervisor can discuss expectations, goals, and a training plan that they can track during these evaluation periods. These meetings will allow for open discussion on any topics necessary.

**Introduction to the Board of Directors**

At the next scheduled Board of Directors meeting, allow the new hire an opportunity to come to the beginning of the meeting to introduce themselves and get a personal welcome from the directors.

**Feedback on Onboarding Process**

Ask employee for feedback after their first week and again at month one, month six, and month 12. This allows opportunity for the organization to continue to improve and re-evaluate their onboarding process.