



Useful Onboarding Tools



Project partners:



WESTDEUTSCHER HANDWERKS KAMMERTAG



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Introduction

For companies, searching for new employees takes time and money. It is all the more frustrating when, after a laborious search, the new employee resigns after a short time. An example: In Italy, for many companies, retention challenges begin during the onboarding phase. According to a Gallup study, 78% of employees reported that their onboarding experience was poorly executed. Additionally, 43% of managers acknowledged that their company's onboarding process was ineffective.

Important reasons are usually, for example, disappointed expectations, unclear roles, lack of feedback from superiors. A systematic, structured onboarding process can counteract this.

Onboarding: Meaning, Purpose, and “Definition”

Onboarding refers to the process of systematically integrating new employees into a company. The aim of onboarding is to make the transition as smooth as possible so that new team members quickly feel comfortable, understand the corporate culture, and can effectively take on their tasks. Well-planned and structured onboarding promotes motivation, retains employees in the long term, and increases productivity. It is crucial for new employees, impacting satisfaction and integration.

Onboarding activities range from maintaining contact and preparing for the first day at work to integrating the employee into the company both professionally and socially. The process therefore accompanies new employees during their first weeks and months. Structured measures and open communication make it easier for them to settle in and lay the foundation for successful cooperation and long-term loyalty.

A structured onboarding process begins before the first day of work and accompanies new employees during their first weeks and months at the company. This includes providing information about the company culture and values, introducing the team and areas of responsibility, and clarifying expectations and goals.

This pays off beyond the onboarding phase: a survey of young people who had previously dropped out of training indicated that half of those surveyed believed that more information about the company could have prevented them from dropping out.



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Onboarding - 4 Key pillars for integration

To ensure a smooth and effective integration of new hires into the team the company should focus on four pillars: Compliance, Clarity, Culture and Connection

Compliance:

Compliance is the housekeeping of the onboarding process: It encompasses the organisation of the onboarding process and refers to the mandatory measures required for new employees. These are basic measures such as documents required from the new employee or the provision of workplaces and work materials.

Clarification:

Clarification refers to how well new employees understand their roles and performance expectations. It is important to clarifying what they need to be doing, how to do it, and how the organization functions in terms of rules and policies. Structure and clarity are essential for individual and team success. It's essential to build ways to help new employees understand what is expected of them and make them feel equipped and supported

Culture:

Onboarding teaches new employees about the company culture – both formally and informally. They learn about the organisation's values, mission, and behavioural norms, helping new hires feel connected to the company's identity and purpose. Through onboarding, they learn what is important in the company.

Connection:

Connection refers to how accepted and valued new employees feel. When new employees feel connected to their colleagues, they feel secure. They then become more committed to their tasks, their colleagues and the company, and show greater appreciation. Connection is a factor that makes new employees feel they have made



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the right decision to join the company. If new employees feel alone and isolated on their first day, it can be difficult to make up for this, as researchers have found. A strong network within the company supports engagement, satisfaction, and long-term retention.

The onboarding process

Companies should design their onboarding process in such a way that it covers all relevant levels in order to successfully integrate new employees.

The process itself is divided into three phases and covers the technical, content-related and social levels. It is therefore not just a matter of imparting technical skills, but also of social integration into the team and identification with the corporate culture. A new employee must feel welcome and valued in order to be motivated and productive.

The phases of onboarding:

- **Preboarding:** The period between signing the contract and the first day of work.
- **Orientation:** From the first day of work to approximately 3 months.
- **Integration:** Approximately until the end of the 6th month.

Companies should implement a structured onboarding process with regular contact, clear performance criteria, feedback meetings, and emphasis on company values and interpersonal interactions.

Surveys have shown that employees particularly value three key onboarding measures: introductions to colleagues, a concrete induction plan and a fully equipped workstation. It is precisely these aspects that help new employees quickly settle into their new company. For many, having a personal contact person is also important.



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Therefore the key measures include:

- Welcome pack before the first day of work with all important information
- Welcome and detailed introductory meeting on the first day of work provide a good overview of the company and the expectations of the new employee
- Introducing the team is the basis for integration into the team
- Induction and possibly training familiarise new employees with important processes, systems and tools.
- Regular feedback meetings allow open questions and uncertainties to be clarified at an early stage
- Assigning a buddy/mentor usually makes it easier and quicker for new colleagues to find their feet in their new environment.

The description presents an ideal process. Not all measures will be fully implementable for everyone. That is not the aim either. The aim is to highlight the possibilities for implementing the process.

Preboarding

This period between signing the contract and starting work is crucial for establishing a solid relationship with the new employee, binding them to the company and preparing them internally for their entry into the company.

In this phase, **communication is key!** Companies should use this time to communicate **regularly** with the new employee and consistently seek contact. There are many opportunities to do so during the preboarding: in order to be well prepared and attuned to the company, the future employee should receive important information about the company, the team and the position so that they can prepare for their new environment and tasks. If the new job involves a move, tips on finding accommodation and, if necessary, nurseries or schools are useful. Any open questions can also be clarified during this phase. Christmas or birthday greetings are sure to leave a positive impression – if relevant.

Internally, it is important to draw up a structured work plan for the first few weeks, with clear tasks and goals, and to provide the necessary work equipment: the



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workplace should be fully set up on the first day. It is also advisable to schedule feedback meetings for the first three months. In the first few weeks, a feedback meeting should take place on a weekly basis.

Preparing and informing existing staff is particularly important. Responsibilities, areas of responsibility and induction plans, including duties, should be communicated to colleagues. It is also helpful to assign an experienced colleague as a buddy/mentor to the new employee. His task is to support the new employee as he settles in. The buddy/mentor should be prepared for this task in advance and given enough time to perform his duties as a mentor. And why not use a company party or team event to introduce the new colleague in a relaxed atmosphere?

Before the first day of work, it is important to inform the new employee about the schedule for his first day. This can be included in a welcome package together with a welcome letter and a small gift, which the new colleague receives in advance. There are many ways to establish contact, inform the new employee and build loyalty to the company before he even starts work.

Orientation phase

First day at work

The first day is crucial: after a successful preboarding, it is essential that the new employee's expectations are met on his first day at work. The aim is to make the new employee feel welcome. He has already been informed about the schedule for the day in advance and therefore know what to expect. Here is an example of a successful schedule:

- Personal welcome by the management or department head
- Welcome and introduction to the staff, including the buddy/mentor
- Brief introductory meeting with management
- Tour of the company (including break rooms/kitchenettes, washrooms, toilets, storage rooms, escape routes, etc.)
- Handing over important items for the workplace (tools, work clothes, keys, etc.)



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- General company information (business area, organisational chart, company mission statement, important contact persons, etc.), to discuss and hand over
- Discussion of the induction plan
- Introduction to colleagues
- Lunch/coffee with supervisors and colleagues
- Invitation to important appointments (regular meetings, departmental meetings, etc.)
- Final meeting with management or department heads at the end of the first day (1st feedback meeting):
 - o Have expectations been met?
 - o Do you still have any questions?
 - o What is your impression of the first day?

First week at work

A structured induction plan with clear tasks and goals gives new employees guidance and reassurance right from the start. The plan is crucial in ensuring that employees know what is expected of them and how they can settle into their role. During their first week at work, new employees familiarise themselves with their areas of responsibility. Their buddy/mentor helps them settle in. At the end of this first week, it is important to have a detailed feedback meeting.

The first week at work at a glance:

- Responsibilities have been discussed
- Meetings with colleagues to introduce the new employee have been arranged
- An initial meeting with the manager has taken place, further meetings have been scheduled
- Regular meetings with the buddy/mentor have been arranged



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- Expectations, goals, schedule and tasks for the first 6 months have been discussed
- Company induction measures (e.g. training courses, etc.) have been scheduled
- Training on the IT system has been provided
- Formal procedures have been explained (e.g. time recording, holiday requests, overtime, substitution rules, etc.)
- Feedback meeting at the end of the week has been scheduled:
 - o What did the employee enjoy during the week?
 - o What did he not enjoy?
 - o Clarification of open questions

First three months

In the first few weeks, the presence of managers and discussions are crucial for integrating employees into the company in the long term. Regular feedback meetings (once a week) also support employee development and are essential for accompanying and adapting the onboarding process.

Recommended measures after 4 to 8 weeks are:

- Feedback discussions with the supervisor have taken place
- Target agreements have been established
- Development opportunities were discussed
- Required further training was discussed

After 3 months:

- Feedback meetings with the supervisor have taken place
- Evaluation of the onboarding process



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Integration phase

During the integration phase, the employee should gradually take on more responsibility and be given and expected to work more independently. Feedback meetings are also essential for onboarding during this phase. Regular feedback meetings with the supervisor/manager should be scheduled during this time. Discussions with the buddy/mentor continue to be helpful during this phase.

Again, the principle applies: communication is key! A good example is the study of the Ziellauf initiative of the project partner WHKT: According to the findings it is primarily a lack of communication and conflict resolution skills that causes most problems in training relationships. Either existing problems were not recognised in the first place, or they were not discussed. Yet conflicts, often caused by learning and performance difficulties and thus motivation problems, are the main reasons for training dropouts, which can be identified early and often resolved through regular, honest communication in order to prevent dropouts. Regarding the apprenticeship it is recommended that the period between two feedback meetings during the course of the whole apprenticeship should not exceed three months, as otherwise issues may accumulate to such an extent that they are no longer easy to resolve.

Feedback discussions in an onboarding process: a few rules and tips

Feedback discussions play a central role in an onboarding process. They represent a deeper exchange of professional and personal skills. A good feedback culture benefits everyone. It is an effective but also demanding tool. In order to give feedback correctly and also to accept feedback, there are a few points to consider.

Essentially, it involves giving feedback on how the other person – the person who receives feedback – is perceived by the person who gives feedback. This can include both positive and negative aspects and behaviours. When giving feedback, it is crucial to communicate the points in such a way as to avoid defensiveness or frustration. As a rule of thumb, the person who gives feedback should always start from his personal impression, i.e. how he, the feedback provider, feels. Inform the person who receive feedback about your personal needs and feelings so that he



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knows what to look out for in the future. Respond to requests and behavioural changes that would make working together easier.

To ensure clarity during the conversation, the feedback discussion should follow a structure:

- 1. How did the person behave?** Identify the problematic behaviour in the specific situation and describe it in a neutral manner.
- 2. What was the effect of this behaviour?** How did the behaviour affect the situation?
- 3. What behaviour would the feedback provider have preferred?**
- 4. And how this different behaviour would have affected the feedback provider?**

The best way to learn how to handle feedback discussions is to follow these rules:

- Create a friendly and calm atmosphere**

Do not conduct the conversation in passing, but find a quiet setting where you can talk without being disturbed. When offering criticism, make it clear that you value the apprentice or employee as a person, but that you are dissatisfied with their work performance, for example.

- Maintain a respectful manner and tone**

This creates openness and trust and includes giving the other person space to express their dissatisfaction and criticism, so that the company also receives feedback for improvement.

- Describe behaviour, don't judge!**

The situation or the other person's behaviour should be described as objectively as possible. Avoid judgements such as 'I didn't like that at all'.

- Be specific in your statements**

Describe specific situations and examples that are not too far in the past. And above all: no generalisations!

- Justify your own point of view**

The more substantiated your feedback and advice is, the greater the chance that it will be accepted.



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- **Address changeable facts**
Address constructive suggestions and solutions that the recipient of the feedback can actually change.
- **Important basic rule: Use 'I' messages (not 'you' messages)**
An example: 'I perceived you as...' Avoid phrases such as: 'You did that completely wrong.'
- **Describe how you felt in certain situations and your reaction to them**
This helps to increase your conversation partner's understanding.
- **Ensure that feedback is welcome and that the recipient is open to suggestions**
- **Do not only address negative points**
Also use praise and words of appreciation. Tip: Use the sandwich tactic for negative criticism: the suggestion for improvement is addressed between two positive points.

It is advisable to prepare well for the feedback meeting. For preparing assessment forms can be used; a sample can be found in the appendix. It is important to note that giving feedback does not mean giving instructions. A feedback meeting is not intended for minor changes to work processes, but – as mentioned above – for a more in-depth exchange of professional and personal skills. Thoughts, suggestions for improvement and requests are noted down for the meeting. The feedback is then formulated and reviewed: Is it understandable? Does it contain only negative points? Is it free of blame and does it include specific suggestions for improvement?

The feedback meeting gives the supervisor/manager/trainer the opportunity to describe their view of things. The employee has the opportunity to improve, as he learns what he is doing well and where there is still potential for improvement.

Ideally, the key points of the conversation should be recorded in written form, especially if goals have been set and specific measures agreed upon. This makes it easier to follow up later and makes the agreements more binding. It is therefore also advisable to give the apprentice or employee a sample of the result.



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Support measures for integration

Numerous coaching and support measures were mentioned in the description of the various onboarding phases.

The buddy/mentor plays a particularly important role in onboarding. Accordingly, they should be prepared for their tasks. This starts with the selection process: an experienced colleague with social skills who knows the company well, is a strong communicator, empathetic and trustworthy should be chosen. Their role must be clearly defined. Their task is to support the social and cultural integration of the new employee in order to promote trust and a sense of belonging. To this end, the mentor is briefed in advance on the company's expectations and the process. In order to fulfil their role, the buddy must be given sufficient time and the training plan for the new employee.

Internal support and coaching measures also include:

- Building trust
- Strengthening self-esteem (conveying recognition and a sense of belonging)
- Establishing a supportive relationship
- Communication on equal terms
- Active listening
- Giving constructive feedback
- Be objective oriented
- Empowerment – promoting independent action

- Promoting self-learning skills and self-empowerment among young employees and trainees
 - o Promoting independent learning
 - o Challenging but achievable tasks
- Provision of resources

In addition to these internal support measures, external support measures are also offered in the project partner countries. In Greece and Germany, support is available for digital and business skills. In Germany, language courses, sustainability seminars and exam preparation courses are also offered. Online learning opportunities as well as online mentoring and coaching courses are available in Spain.



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Onboarding in partner countries: Similarities and differences

There are certainly some similarities between the project partner countries Germany, Italy, Spain and Greece. For example, that an onboarding process is more commonly used in large companies than in SMEs. The tools used in the onboarding process itself are also similar. A certain relevance of onboarding can also be observed in all countries.

On the other hand, there are some significant differences with regard to onboarding. In most of these countries, the concept of preboarding is little known or unknown and not used. In Germany, preboarding is particularly important in the training sector. Preboarding is important for dealing with the 'ghosting' of apprentices: apprentices who have signed an apprenticeship contract but do not show up on the first day of training.

In addition, in Germany, the chambers of commerce as well as the chambers of crafts and skilled trades offer support and advice on onboarding and also later on in the process, for example to resolve conflicts and thus prevent training dropouts. Apprentice supervisors ("Lehrlingswarthe") from craft guilds are also available for advice and mediation. Companies can draw on further support options for learning and performance difficulties, which can often lead to motivation problems as another major reason for training dropouts.

For example, the German employment agencies offer the „Assistierte Ausbildung“ (assisted apprenticeship) program where a supervisor helps young people complete a training program, including studying for exams, staying on track at vocational school, resolving a private dispute, solving a problem at work or improving German language skills. There are no costs for the company or the apprentice, as these are covered by the employment agency. The support plan is drawn up in consultation with the company providing the training and the vocational school.

The Competence Centre for Securing Skilled Labour (KOFA) publishes scientific articles focusing on SMEs and offers free, practical support for personnel planning and management, including recommendations, checklists and examples for recruitment and retention.

The last example is the „VerAplus“ mentoring programme. The programme, run by the „Senior Expert Service“ is aimed specifically at trainees. The aim is to improve training success rates. The VerAplus programme brings trainees together with retired professionals and is based on a one-to-one principle (1 trainee, 1 expert). The



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programme helps with problems in training companies or vocational schools and with personal concerns. Trainees receive further measures with external support from the youth agency and training support through training-related assistance. Trainers can undergo further training to become 'trainee coaches' or 'learning guides'.

In Italy and Greece, only a few companies offer a multi-stage onboarding process. Institutions also provide little support for the importance of the onboarding process in the construction industry.

In Spain, on the other hand, regulations are very important. For example, safety regulations and safety training are mandatory in the onboarding process. In contrast to Italy, many onboarding tools are used online in Spain.

Retention management

Finally, let's take a look at the phase after onboarding: retention management.

The aim of retention management is to retain employees in the company in the long term in order to reduce staff turnover, prevent knowledge loss due to the departure of skilled workers and the associated costs of re-recruitment and training.

Retention management includes measures aimed at increasing employee motivation and satisfaction. Employees should identify with the company, feel valued and be able to develop further.

The focus is on career and development prospects, promoting a positive corporate culture, and recognition and appreciation. Important measures are market-driven and performance-related pay, work-life balance and leadership skills.

- Career and development prospects:
Companies should outline clear career paths and actively promote further training measures. Feedback meetings ensure that employees move closer to their personal career goals.
- Positive corporate culture:
Corporate culture is a key factor in employee retention. Employees stay where they feel comfortable, where they are valued and involved in decisions. In a



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good corporate culture, communication is transparent at all levels and a positive feedback culture is practised. A corporate culture must be supported by all employees. Team-building activities and events are a great way to promote company spirit.

- Recognition and appreciation:

Employees want to feel that their performance is seen and appreciated. Appreciation can be established in many ways within a company, not just monetarily: for example, by giving praise and recognition in feedback meetings. Promotions and expanding areas of responsibility are also ways of showing appreciation for an employee's performance.

In addition, employee retention measurement is recommended. It provides information on optimising measures in the area of employee retention.

Conclusion

A well-thought-out onboarding process is a crucial factor for the success of new employees in the company and contributes significantly to long-term retention and motivation.

However, there is no one-size-fits-all process. Requirements and conditions vary from company to company and - in some cases - from country to country. The measures and examples presented here are intended to build knowledge and create an incentive to develop and implement a well-thought-out, structured onboarding concept tailored to the respective company. It is a process that evolves with each new employee who goes through onboarding and is adapted to new circumstances. It is therefore a process that will become more established over time. The goal is to create a qualified and motivated team by retaining good employees in the long term, thereby saving costs and time.

The aim is to make it easier for new employees to settle into the company and to promote long-term loyalty.



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Annex

Annex 1: Onboarding Checklist

The following checklist covers preboarding and the various onboarding phases. It should be adapted to your own circumstances and needs.

CHECKLIST

1. Before the first day of work (pre-boarding phase)

Start: After signing the contract

Communicate with the new employee!

- **Maintain regular contact** with the employee
- **Provide important information** about the company, the team and the position
- Clarify any open questions
- Invite them to company events

Administrative preparations

- Create personnel file
- Request documents (social security card, etc.)

Equip the workplace (as required)

- Access data
- Computer
- Email address
- Telephone and telephone number
- Licenses
- Seat
- Enter employee in lists, distribution lists, and organizational charts
- Employee ID card
- Name tag
- Business cards
- Keys
- Parking permit
- Public transport ticket
- Work clothing
- Tools
- _____
- _____
- _____
- _____



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Prepare information about the company (as needed)

- Organizational chart
- Company Guideline and values
- Work style
- Business etiquette
- Important external contacts
- Upcoming training courses
- Code of conduct
- _____
- _____
- _____

Preparation and information internal employees (as needed)

- The workforce is informed about the new colleague
- Responsibilities are defined
- The new employee's area of responsibility has been agreed upon and communicated to colleagues
- The training plan including responsibilities has been created and communicated
- A buddy/mentor has been found and prepared
- _____
- _____
- _____

Information for the new employee

- The new employee has been informed about the schedule for their first day at work (When does work start? Who will pick up the new employee and where? What does the new employee need to bring with them? When does the first day of work end?)
- _____
- _____
- _____

Welcome package (as needed)

- Welcome letter
- Schedule for the first day of work
- Invitation to team events and employee meetings
- Relevant company information (see also above)
- Welcome gift
- _____
- _____
- _____

Additionally: for new employees who need to relocate (as needed)

- Information on finding housing
- Kindergarten
- Schools
- Leisure activities
- Moving companies
- _____
- _____
- _____



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CHECKLIST

2. The first day of work

Procedure

- Personal welcome by the management or department head
- Welcome and introduction to the staff
- Initial brief introductory meeting with the management
- Tour of the company (materials storage, restrooms/washrooms, break rooms, kitchenette, cafeteria, copier, emergency exits, etc.), with management, department head or supervisor
- Handing over of all relevant items for the workplace (work clothes, tools, telephone, access data, keys, etc.)
- Handing over and discussing general company information, e.g., organizational chart, company mission statement, business area, important contacts, etc.)
- Discussion of the induction plan (department head or supervisor)
- Introduction to colleagues incl. buddy/mentor
- Lunch/coffee with supervisor and colleagues
- Invitation to important appointments (regular meetings, departmental meetings, etc.)
- Final meeting with management or departmental management at the end of the first day:
 - Have expectations been met?
 - What questions remain unanswered?
 - What are the new employee's impressions?

- _____
- _____
- _____

3. First week of work

General (as needed)

- Exchange dates with colleagues have been agreed: The team introduces itself
- Responsibilities have been discussed
- An initial meeting with the supervisor has taken place, further appointments have been scheduled
- Expectations, goals, schedule, tasks, and projects for the first 6 months have been discussed
- Regular meetings with the buddy/mentor have been arranged
- Company induction measures (such as training, introductory courses, etc.) have been scheduled
- Meetings with suppliers, customers, and service providers have been arranged
- Training on the IT system has been completed

- _____
- _____
- _____

Formal procedures were explained (as needed)

- Time recording
- Vacation requests
- Document filing
- Substitution rules
- Overtime

- _____



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CHECKLIST

4. After 4 to 8 weeks

- Feedback meeting with the supervisor has taken place
- Target agreements have been set
- Development opportunities have been discussed
- Required further training has been determined and planned
- _____
- _____
- _____
- _____

5. Ongoing or until the end of the onboarding phase

- Regular appreciative exchange meetings with the buddy/mentor have taken place
- Regular appreciative feedback meetings with the manager/supervisor (e.g. half-yearly) have taken place
- _____
- _____
- _____
- _____



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Annex 2: Template for an internal assessment form for staff members

Name of the staff member: _____

Assessment for the period from: _____ to _____

Areas of application/tasks performed:

WORK ETHIC	1	2	3	4	5
INTEREST IN WORK	<input type="checkbox"/>				
COMMITMENT/MOTIVATION	<input type="checkbox"/>				
PERSISTENCE AND RESILIENCE	<input type="checkbox"/>				
RELIABILITY	<input type="checkbox"/>				
DILIGENCE	<input type="checkbox"/>				
INDEPENDENCE	<input type="checkbox"/>				
WORK RESULTS	<input type="checkbox"/>				
PUNCTUALITY	<input type="checkbox"/>				
_____	<input type="checkbox"/>				

SOCIAL BEHAVIOUR	1	2	3	4	5
DEALING WITH SUPERVISORS	<input type="checkbox"/>				
DEALING WITH COLLEAGUES	<input type="checkbox"/>				
DEALING WITH CUSTOMERS	<input type="checkbox"/>				
_____	<input type="checkbox"/>				



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Remarks:

Date

Signing

cf.

Westdeutscher Handwerkskamptag: Kommunikation und Motivation in der Ausbildung. Leitfaden für Ausbilder in Handwerksbetrieben, Düsseldorf 2001



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