TOTARA:
BUILDING AN ONBOARDING CHECKLIST

This is a transcript of a video on the Totara Academy

WHENEVER YOU ONBOARD A NEW PERSON INTO YOUR ORGANISATION YOU'LL WANT TO MAKE SURE THEY HAVE THE BEST POSSIBLE START.

How do you ensure your new people are set up correctly and that they have access to everything so that they can start to work productively?

One way to do this is by building out onboarding checklists for members of HR or for Managers to ensure nothing is missed in those crucial first few days and weeks.

One way to build out a checklist on Totara is by creating a new performance management activity.

On my platform, I have several onboarding checklists set up. Let's take a look at one by navigating to Activity management.

On this page you'll see a template of all of the performance management activities you've got set up, such as any appraisals or check-ins that you have created.

If you're interested in learning more about performance management activities such as how to create and use appraisals, 360 feedback or check ins you can see how to set these up in the dedicated Academy courses.

In this video we'll use a performance activity but we'll be using this to ensure your new starters stay on track during their onboarding process.

Let's take a look at an example of a pre-onboarding checklist that you could set up.

Here I've built a checklist that uses a range of question elements that either a member of HR or the new employees' Manager could utilise when onboarding.

At the top of my checklist I'm using a static content element to introduce the checklist to everyone.

Then to build out my checklist, I'm simply using a selection of Single-select elements to create my checklist items, such as this one.

You can see the different types of questions that I'm adding here.

When HR or a new person's Manager has completed an item on the checklist, they'll simply need to select 'done' to know that activity has been crossed off the to do list.

Creating checklists in this manner offers you the ability to have several induction touch points such as prior to a new person starting on the person's very first day and in their first week and month. This ensures that nothing is missed and helps the new starter to settle into the organisation.

As well as adding simple questions, you could add review elements to your checklists and include things like goals and any courses that you'd like a new starter to have completed in their first week.

By using performance activities, there are lots of different ways that you can ensure your people are onboarding as well as they can.

As well as ensuring HR and a new team members manager has completed the relevant tasks to onboard a new starter, you can also use the performance management activity to understand how the new starter feels about their own onboarding experience.

Here you can see this checklist has been set up for the 'subject' or in other words the new starter, rather than their Manager or a member of HR.

Here I've added a range of questions that a new employee could answer to help me continually improve our onboarding experience for every other new starter.

In this video, we've had a brief look at how you could use a performance management activity to create a set of checklists.

Why not have a go at building out your own induction checklist today?

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