

EOS Core Process: New Employee Onboarding

Process Owner: [Person from EOS Accountability Chart]

Last Updated: [Date]

Review Date: [Next quarterly review date]

EOS Integration

Connected EOS Tools:

Related EOS Rocks: [Current quarter Rocks that improve this process]

EOS Scorecard Metrics: [Weekly numbers tracked for this process]

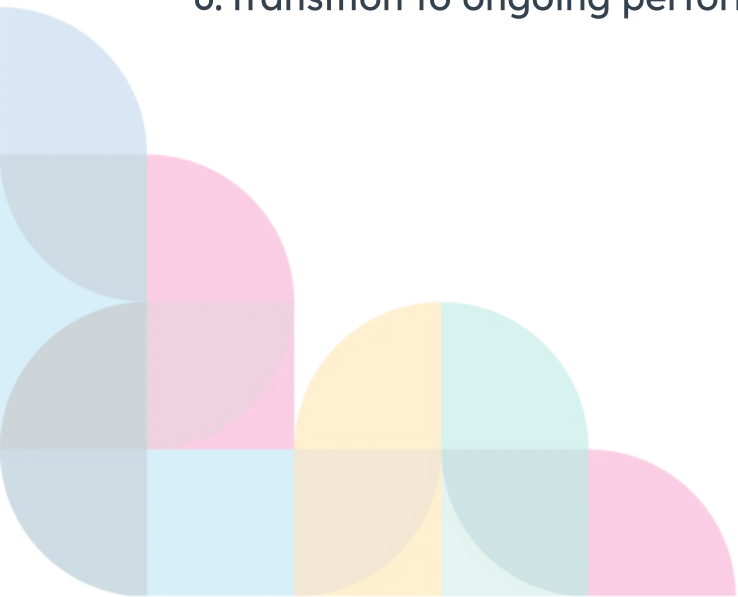
Accountability Chart Connection: [Which seat owns this process]

Process Overview

Purpose: Integrate new hires effectively into the organization, ensuring they have tools, knowledge, and relationships needed for success

High-Level Steps:

1. Complete pre-boarding preparation
2. Conduct first day orientation and setup
3. Provide role-specific training and integration
4. Monitor progress and provide feedback
5. Complete formal review milestones
6. Transition to ongoing performance management



Core Process Detailed Steps

Step 1: Complete Pre-boarding Preparation

- Send welcome email with first day details
- Set up workspace, equipment, and system access
- Prepare new hire paperwork and documentation
- Schedule first day meetings and orientation
- Assign buddy/mentor for peer support

Step 2: Conduct First Day Orientation and Setup

- Complete HR orientation and paperwork
- Set up IT equipment and system access
- Provide company handbook and policy overview
- Introduce to immediate team and key stakeholders
- Review role expectations and initial goals

Step 3: Provide Role-Specific Training and Integration

- Complete job-specific training modules
- Shadow experienced team members
- Begin working on initial projects and assignments
- Attend relevant meetings and team activities
- Start building relationships with key collaborators

Step 4: Monitor Progress and Provide Feedback

- Conduct daily check-ins during first week
- Provide regular feedback on performance and integration
- Address questions and concerns promptly
- Adjust training and support as needed
- Gather feedback on onboarding experience

Step 5: Complete Formal Review Milestones

- Conduct 30-day performance and satisfaction review
- Complete 60-day progress assessment
- Perform 90-day comprehensive evaluation
- Address any performance or fit concerns
- Celebrate successful integration milestones

Step 6: Transition to Ongoing Performance Management

- Move to regular performance review cycle
- Set ongoing goals and development plans
- Establish routine one-on-one meeting schedule
- Document onboarding success and lessons learned

Quality Standards & Success Metrics

Must-Have Standards:

- [] Standard 1 (measurable)
- [] Standard 2 (measurable)
- [] Standard 3 (measurable)

EOS Scorecard Metrics:

Weekly Metric 1: [Target number]

Weekly Metric 2: [Target number]

Monthly Metric: [Target number]

Accountability: HR owns process coordination, Manager owns integration and feedback, Buddy/Mentor owns peer support

Frequency: For each new hire, process reviewed quarterly

Success Metrics: Time to productivity, 90-day retention rate, onboarding satisfaction scores, manager feedback ratings

Process Connections

Receives From: [Which EOS core process feeds into this one]

Hands Off To: [Which EOS core process this feeds into]

Dependencies: [Other processes or resources needed]



Tools & Resources

Required Systems/Tools:

Tool 1

Tool 2

Template/Document links

Training Materials:

Link to training video

Link to detailed SOPs (if needed)

Onboarding checklist

Troubleshooting & Common Issues

If [Problem], Then [Solution]:

Problem 1 → Solution 1

Problem 2 → Solution 2

Problem 3 → Solution 3

Escalation: [When to involve process owner or leadership team]



Process Improvement

Last Quarter's Improvements: [What was changed and why]

Current Issues to Address: [Items for next EOS Rock or Level 10 discussion]

Issue 1

Issue 2

Ideas for Next Quarter: [Potential improvements to consider]

Approval & Sign-Off

Process Owner Approval: [Name + Date]

Leadership Team Review: [Date reviewed in Level 10 or quarterly]

Next Review Date: [Align with EOS quarterly cycle]



Quick Reference Card

[One-page summary of key steps for daily use]

The 5 Key Steps:

[Step 1 summary]

[Step 2 summary]

[Step 3 summary]

[Step 4 summary]

[Step 5 summary]

Key Metrics: [2-3 most important numbers to track]

Emergency Contacts: [Who to call if process breaks down]

