

NEW CLIENT ONBOARDING



INTRODUCTION

Hello! My team and I are excited to work with you! Our work for the next 12 months will focus on providing ongoing HR support to employees and thought partnership and coaching to your leadership team.

Select a date and time for our kickoff meeting.

You can schedule your kickoff meeting [here](#). During this meeting we'll:

- Plan for the 1-on-1 employee conversations that my team and I will conduct with employees and the leadership team in April. Confirm if these conversations will take place in person or virtually.
- Set a date for our virtual attendance at a staff meeting in April to introduce our team and the type of HR support they will receive from us.
- Review the timeline for ongoing support and confirm any additional information or resources that are needed.

Feel free to invite any additional team members that you believe should be in this meeting.

About this onboarding questionnaire

It is important that we have a good understanding of the current state of your organization. Therefore, please complete this questionnaire by **COB on [date]**. Write your responses directly in this Google Doc, so I can access it to review your responses prior to our kickoff meeting.

For some of the questions you will be asked to upload documents to your private client folder in the *Your HR Strategist* Google Workspace. Here is your link to the folder: **[link to Google Drive Folder]**

Grab a cup of coffee



This questionnaire should take you 30-60 minutes to complete. I emailed you a digital gift card so you can grab a coffee or tea to sip and enjoy as you complete it. It was sent from the email address hello@yourhrstrategist.com. If you don't see the gift card in your inbox or spam folder, please let me know.

Also, you may find it helpful to get input from teammates. If so, feel free to share the link to this document with them so they can contribute to any areas where you feel stuck.

If you need help or have any questions, I'm just an email away! Reach out to me at any time at krystal@yourhrstrategist.com. Looking forward to our work together!

Krystal Speed
Your HR Strategist



CLIENT ONBOARDING QUESTIONNAIRE

Complete all pre-work by **COB, [date]**.

THE BASICS

- POC's Name:
- POC's Email Address:
- POC's Phone Number:
- POC's Birthday (we like to celebrate with you 🥳):
- Business Name:
- Business Mailing Address:
- Website:
- Business Social Media Handles -
 - Facebook
 - Instagram
 - LinkedIn
 - TikTok
 - YouTube
 - Other

Please share your employee roster. You can either print a report from your HR system or you can complete this [worksheet](#).

This roster will be used when scheduling 1-on-1 conversations and to distribute any other relevant communications to employees.



CURRENT STATE OF YOUR ORGANIZATION

- What is your organization's origin story? When was it founded, why and by whom?
- What are your organization's mission, vision and values? If they are available online, you can just drop the links below, otherwise please write them out below.
 - Mission Statement:
 - Vision Statement:
 - Core Values:
- Does your organization have specific goals and initiatives around the following targets? If so, please share them below (linking to other resources that share your commitments to these is also fine).
 - Diversity, Equity, Inclusion (DEI) -
 - Corporate Social Responsibility (CSR) -
 - Environmental, Social and Governance (ESG) -
 - Other
- What are your top 3-5 business goals for the next 12 months?
 -
- What makes your company a great place to work?
 -
- What type of work environment does your company have?
 - ☐ 100% in-person
 - ☐ Hybrid and Remote-friendly (some staff work in-person and some work remotely, based upon their role and responsibilities)



- ☐ Remote-first (staff primarily work remotely but may work in-person with other coworkers occasionally)
- ☐ Fully Remote
- Now, tell me a bit about your team:
 - How many employees do you currently have on your team?
 - Full-time:
 - Part-time:
 - How many contractors do you currently have on your team?
 - Full-time:
 - Part-time:
 - Types of roles/services being provided
 - How often are they providing services?
 - What staff member(s) oversee them?
 - What training do you provide to any that are “client-facing”?
 - How many employees are you planning to add to your team in the next 12 months?
 - Full-time:
 - Part-time:
- How would you describe your organizational culture?
 -
- Related to your people and your organizational culture, what is keeping you up at night?
 -
- Who on your team is currently responsible for HR-related tasks?
 -
- What systems do you use to manage the following:
 - HR/payroll



- Benefits administration
 - Onboarding new employees
 - Performance management
 - Email
 - Project management
 - Team collaboration
 - Intranet/employee workspaces
 - Appointment scheduling
- Have you worked with any other HR consultants before? If so, what results did you achieve together?
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- At the end of this 9-month engagement of working together, what would be the absolute dream to walk away with?
 -
- What would be the goals you achieve after 6-12 months of us working together?
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- Is there anything else you would like me to know about you or your organization?
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SUPPORTING DOCUMENTS

These supporting documents were shared with us last April and saved in **your client folder on Google Drive [hyperlink]**. If any need to be updated, or if there are additional documents that you think will be helpful, please upload them to the Google Drive.

- ☐ Logo (provided as JPG or PNG; this will be used to brand all deliverables from this project)
- ☐ Current Organizational Strategic Plan
- ☐ Employee Handbook
- ☐ Org Chart
- ☐ Summary of Benefits and Perks (PTO, 401k, Healthcare)
- ☐ New Employee Onboarding Checklists, Guides and/or New Hire Packet
- ☐ Sample Team Meeting Agenda
- ☐ Sample Job Description
- ☐ Sample Performance Appraisal
- ☐ Anything else that you think would be helpful (list below and hyperlink each resource)

You did it!

✓ ONBOARDING QUESTIONNAIRE COMPLETED

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