



ONBOARDING

The Employee Onboarding Playbook

Turn day-one chaos into a structured, role-based path new hires actually finish.

A TriLMS eBook





First impressions compound

Onboarding is the highest-leverage training a company delivers: it sets expectations, culture and competence before bad habits form. Yet most onboarding is a folder of PDFs and a calendar invite. A structured path — assigned automatically on day one — is the difference between a confident new hire in week one and a lost one in month three.

A role-based onboarding path

Design onboarding as a sequence of required training tied to the role, not a single generic course:

- Company & culture: mission, values, policies, the tools everyone uses.
- Compliance essentials: security awareness, data protection, health & safety — assigned with due dates.
- Role skills: the specific competencies for the job, delivered read/listen/watch.
- Manager check-ins: a live session or recording, plus a short knowledge check.

Automate the assignment so a new hire's path appears the moment their account is created — no manual chasing.

Make it measurable

Track time-to-competency, completion and attendance so managers know who is on track. Surface at-risk new hires early — disengagement in week one predicts turnover. Issue a certificate at the end so completion is recognized and recorded.

Quick checklist

- Define a role-based onboarding path
- Auto-assign it on account creation
- Include compliance essentials with due dates
- Mix read / listen / watch content
- Add a manager live session or recording
- Track completion and flag at-risk new hires
- Issue an onboarding certificate

Try it in TriLMS

In TriLMS, build the path once, assign it to a department, and every new hire gets it automatically — with a manager dashboard and certificates. See it at trilms.com.