

SOP Template: Record-keeping of Onboarding Milestones and Feedback Collection

This SOP details the process for **record-keeping of onboarding milestones and feedback collection**, ensuring systematic documentation of employee progress, key onboarding activities, and feedback from new hires. It covers tracking completion of training modules, orientation sessions, and probation reviews, as well as gathering and analyzing feedback to improve the onboarding experience and support employee integration and engagement.

1. Purpose

To establish a consistent method for recording onboarding milestones and collecting feedback from new employees, enhancing accuracy, compliance, and continuous improvement of the onboarding program.

2. Scope

This SOP applies to all HR personnel and managers responsible for onboarding newly hired employees.

3. Responsibilities

- **HR Staff:** Maintain records, schedule feedback collection, and ensure documentation is up-to-date and compliant.
- **Supervisors/Managers:** Track team member progress, complete milestone checklists, and follow up on feedback action items.
- **New Employees:** Attend all required onboarding sessions and complete provided feedback forms.

4. Onboarding Milestone Record-Keeping Procedure

1. **Initial Documentation:**
 - Create a unique onboarding file for each new hire (digital or paper).
 - Ensure all personal information and required forms are collected and stored securely.
2. **Milestone Tracking:**
 - Update the onboarding file at each completed stage, including training modules, orientation sessions, compliance confirmations, and probation review dates.
 - Use the standardized Onboarding Milestone Checklist (see Template section).
3. **Record Access and Security:**
 - Limit record access to authorized personnel only.
 - Ensure records are stored in compliance with organizational and data privacy policies.

5. Feedback Collection Procedure

1. **Scheduling Feedback:**
 - Schedule regular feedback touchpoints (e.g., after orientation, 30 days, end of probation).
2. **Feedback Tools:**
 - Distribute electronic or paper feedback forms/surveys to new hires.
 - Conduct one-on-one meetings to capture in-depth feedback when appropriate.
3. **Recording and Analysis:**
 - Store all collected feedback in the onboarding file or a centralized feedback repository.
 - Review and analyze responses quarterly to identify trends and areas for improvement.
4. **Action and Reporting:**
 - Share summarized feedback with the onboarding team and leadership.
 - Update onboarding processes as needed based on feedback and analysis.

6. Onboarding Milestone Checklist Template

Milestone	Date Completed	Verified By	Comments
Offer Letter Sent & Signed			
Personal Documentation Collected			
Orientation Completed			
Mandatory Training Modules			
30-Day Feedback Collected			
Probation Review Completed			

7. Feedback Form Template

Feedback Question	Employee Response
How clear and helpful was the onboarding process?	
Were your training needs met?	
How would you rate communication with your team and supervisor?	
Is there anything you would improve in the onboarding experience?	
Additional comments or suggestions:	

8. Review and Continuous Improvement

- Review the SOP annually or as needed based on legislative, compliance, or organizational changes.
- Seek regular feedback from managers and new hires to refine record-keeping and feedback processes.

9. References

- Organizational onboarding policy.
- Data privacy and retention policy.

10. Revision History

Date	Version	Description	Author
	1.0	Initial release	