What to Document Before Your Next Hire

Service area: Process & SOP Development / Organizational Effectiveness



Sam's first day went smoothly on paper. Accounts were set up, a welcome message was waiting, and the team was friendly.

By Wednesday, though, Sam was unsure what to work on, which requests to prioritize, and who to ask about a client question.

Illustrative example: the new employee described is fictional.

A small amount of documentation before the start date can make the first months far more productive for the new person and the team.

Key takeaway:

Document the operational side of a role before the new hire starts.

Start with the role, not the handbook

Outcomes
what success looks like in this position

Responsibilities
the recurring work they own

Boundaries
what is outside the role

Working relationships
who they work with most closely, and how



If you cannot write these down in a page, the role itself may need more definition before someone steps into it.

Key takeaway:

A clear role definition is more useful than a handbook alone.

Choose the essential workflows

You do not need to document everything the business does. Focus on the work the new hire will perform in their first weeks.



WORKFLOW CAPTURE CARD

- Inputs needed to start
- The main steps
- The expected output
- How quality is checked

Short, accurate procedures are more useful than comprehensive ones that take months to write.

Key takeaway:

Document the few workflows the new hire will use first.

Make decision rights explicit

New employees often hesitate not because they lack skill, but because they do not know what they are allowed to decide.



What they can do independently

What requires approval, and from whom

Where to bring questions or unusual situations

This prevents both over-caution and unintended overreach.

Key takeaway:

Clear decision rights help new employees act with confidence and appropriate control.

Create an organized starting point

PRINCIPLE

Give people what they need for their role, and add more as responsibilities grow.



INSIGHT

It is easier and safer than removing access later.

Key takeaway:

Give new hires one organized, role-specific starting point with least-privilege access.

Plan demonstration and practice



1. **Introduction**
   explain the purpose and context
2. **Observation**
   watch an experienced person do the task
3. **Supervised practice**
   do it with support nearby
4. **Feedback**
   review what went well and what to adjust
5. **Independent work**
   take ownership, with check-ins

Planning this sequence for the first few workflows gives structure to the first month and makes progress easier to see.

Key takeaway:

Move new hires from context to independent ownership through a deliberate practice sequence.

Use onboarding to improve the library



Every new hire is a test of your documentation.

Three question review

1. What was missing?
2. What was confusing or out of date?
3. What did you have to ask about repeatedly?

Update resources based on the answers. Otherwise, the next hire will discover the same gaps.

Key takeaway:

Turn each onboarding experience into an update to the documentation library.

Reader exercise: prepare a one-page role starter

If you are hiring soon, complete it before the start date.

1. Outcomes
2. First recurring tasks
3. Resources
4. Decision boundaries
5. Support contact

A one-page role starter turns scattered onboarding details into a usable starting point.

Key takeaway:
Prepare the role starter before the new hire arrives.

When to bring in support?



If your business is preparing to grow its team and documentation is thin, AuofOnyx can help.

We work with businesses to build role-specific onboarding flows, practical documentation, and organized knowledge structures.

Contact AuofOnyx to discuss your next hire.

Key takeaway:

Practical documentation makes the next hire more productive for the new person and the team.

Source: Acas. "Induction checklist template."
Read and download the Acas induction checklist: https://www.acas.org.uk/template-checklist-for-induction-of-new-staff