

# Onboarding Timeline Template

Use this timeline template to help you navigate the transition, including everything from compatibility checks to running your first month's payroll.

## Onboarding Timeline

Step	Item	Description	Proposed Interaction	Typical Dur
▼ <b>Step 1:</b> Final Compatibility Check	2	Country coverage and compliance review	Arrange a final meeting to ensure that all employees have been accounted for in terms of their country of employment, current employment status (incl. statutory leave & visas) and employment conditions (incl. benefits and commitments).	Video call Email 1 hr
		Meet your Customer Success Manager	Introduction to Customer Success Manager who will support you during and after onboarding and employee switch process.	Video call 30 mins
▼ <b>Step 2:</b> Commercial Agreement	2	Finalise level of service, pricing and contract duration	Sales representative and Legal team to support you with any commercial questions that arise.	Email Video call 5 days
		Sign the commercial agreement	New EOR provider and your company sign the commercial agreement to kick off the partnership.	In Platform 1 day
▼ <b>Step 3:</b> EOR Platform Set Up	2	Open the company account on the EOR Platform	Provide the details needed to set up your company account in the EOR provider's platform. You'll also add Admin Users as required in this step.	In Platform 30 mins
		EOR to share full onboarding project timeline	Your EOD should present you with a country-specific onboarding plan.	Video call Messenger
▼ <b>Step 4:</b> Country Compliance & Set Up	5	Review and understand employer obligations	Your provider's local HR Compliance team will walk you through and answer any questions you have on employer obligations for each country.	Video call In Platform 2 hrs
		Set your default employment conditions	On the same call, they will help you set your policies for employment in each country in the platform.	Video call In Platform 2 hrs
		Share previous EOR's employment agreements and compensation with new EOR	The EOR team reviews your employees' current employment agreements and compensation to understand their current terms of employment to ensure the new contracts uphold their employment conditions.	30 mins

	Review employment agreement templates	Review the employment agreement templates that will standardise your contract for each country. The HR Compliance team should support your questions and amendments.	In Platform	2 days
	Set your default employee benefits	Boundless Global Payroll Team supports you in establishing your standards for employee benefits across all of your countries.	In Platform Video call	1 day
▼ <b>Step 5:</b> Preparing For Employment	Securely transfer your employees' data to the EOR	Securely transfer your employees' employment data directly into the EOR platform or via a secure shared drive.	In Platform	2 hrs
	EOR to share draft of employment agreements	EOR shares the individual employee employment contract drafts and compensation packages.	In Platform	
	Review and finalise the employee contracts	HR Compliance team supports you in finalising your review of the contracts and compensation packages.	Video call In Platform	2 days
	Align on employee start date	The employee start date is timed to begin the day after the employee is due to terminate with your previous EOR.	Video call Email	
▼ <b>Step 6:</b> Employee Communications	Build an employee communication plan	Your Customer Success Manager works with you to build a communication plan (including communication channel, FAQs and project timelines) to give you what you need to inform your employees of the switch to the new EOR.	Video call Email Messenger	3 days
	Inform your employees of the upcoming switch	You inform your employees that they will be moving to a new EOR. The new provider should be available to present the process to your employees, but you know your employees best and the EOR should follow your lead.	Your Channel/s	
	Field and answer employee questions and concerns	You and the new EOR team should have a shared communication channel to field and answer questions employees have about the switch.	Your Channel/s	5 days
▼ <b>Step 7:</b> Employee Onboarding	Employees receive and review their employment agreements	Employment contracts are delivered to the employees via the EOR platform for review. The HR Compliance team should be on-hand to support.	In Platform Messenger	
	Employees to sign their employment agreements	Employees will sign their employment agreements in the EOR platform.	In Platform	2 days
	EOR & you sign the employment agreements	You and the new EOR will sign the employment agreements in the EOR platform.	In Platform	1 day

	Employees will onboard on the EOR platform	Your EOR should have an intuitive platform will help employees self-onboard, securely share their personal data and upload relevant documentation for employment.	In Platform Messenger	1 day
	Enrol the employees locally in their country	EOR Payroll will enrol the employees with the local labour authorities and benefits providers.		3 days
▼ Step 8: Official Start Date	1	Employees officially start with new employer	Employees start employment via the new EOR.	In Platform
▼ Step 9: First Month's Payroll	3	You'll amend and confirm payroll for month 1	You should be able to review and confirm any changes to payroll in the EOR platform.	In Platform
		Invoices and Payroll reports	EOR should issue invoices and payroll reports into the platform.	In Platform
		Payment to EOR	Payment must be made to EOR for the current month by the agreed upon date.	Your Channel/s
▼ Step 10: Salary Payments and Payslips	2	Employees to receive their first salary payment	The EOR will pay employees by the last working day of the month.	
		Employees to receive their first payslip	The EOR should issue payslips into the platform on the last day of the month.	In Platform