The preboarding checklist

– How to excite, engage, and prepare your new hires before day 1

The trick to quality employee retention is top-notch onboarding. With an increasingly shorter employee life cycle and intense competition, the focus has shifted from retention to productivity. To create more productive employees faster, think of onboarding as a process over time, from contract signing to the first 90 days.

How do you create a smooth, engaging onboarding process that harnesses the excitement from the recruiting moment and empowers the new hire to add value within the first month?

You add a Preboarding phase to your onboarding program!

What exactly does that look like?

A great place to start is by focusing on the 4 C's of Onboarding: *Culture, Connections, Clarification*, and *Compliance*. In the checklist below, you'll find specific ideas on how to structure and design your Preboarding phase to inform, engage, and prepare both the new hire and your organization for success.

RECRUITING · **PREBOARDING** · **ONBOARDING**

Sign the contract · Day one

Job posting & application · Team introduction · Welcome email · Equipment & tools · Welcome session · Training & goal-setting

Interviews · Offer stage · Forms & policies · Communication channels · Meet your mentor · Integration & check-ins

Recruiting

- ☐ **Job posting & application:** Craft engaging job descriptions and utilize multiple platforms to reach a diverse audience.
- ☐ **Initial contact:** Send a personalized message acknowledging receipt of the application.
- ☐ **Interview process:** Conduct structured interviews to assess fit and skills.
- ☐ **Team introduction:** Hello from your team and learn about company culture.
- ☐ **Offer stage:** Extend job offer and negotiate terms Signing the contract
- ☐ **Signing the contract:** Ensure clear understanding of terms and conditions.

Preboarding

Welcome email

- ☐ Personalized email from the hiring manager with next steps.
- ☐ Brief video introduction from the CEO.
- ☐ Contact information for immediate questions or concerns.

Onboarding playbook

- ☐ Introduction to company culture and work routines.
- ☐ Policies: work hours, dress code, benefits.
- ☐ Delivery of equipment and introduction to software tools and communication channels.
- ☐ Access to an interactive online platform or app for the playbook.

1 week before start

- ☐ Orientation plan and schedule for the first week.
- ☐ Office address and directions.
- ☐ Check-in from hiring manager - assess feelings and answer questions.

1 day before start

- ☐ Reminder email or SMS: "See you tomorrow!"
- ☐ Reminder of any documents needed.

Onboarding

Day 1

- ☐ **Welcome session:** In-person office tour or virtual orientation.
- ☐ **Meet the team:** Introductions to hiring manager, team, and mentor/buddy. Schedule One-on-one meetings with team members.
- ☐ **Starting kit:** Receive desk, tools, notebooks, etc. Include personalized items like a welcome note or company merch.
- ☐ **Lunch:** Join the team for lunch.
- ☐ **Training:** Company overview and role-specific training
- ☐ **Schedule:** Present schedule for week 1, set expectations, and discuss goals.

Week 1

- ☐ **Team integration:** Join team meetings and start initial tasks.
- ☐ **Project assignment:** Start the first project and ensure alignment with new hire's skills and interests.
- ☐ **HR check-in:** Ensure all paperwork is complete and address initial concerns in anonymous feedback form.
- ☐ **End-of-week check-in:** Discuss progress and time for questions. Review positive experiences and areas for improvements.
- ☐ **Planning:** Outline expectations and plan for the first month.

Month 1

- ☐ **Long-term goals:** Discuss and elaborate on long-term goals and create a personalized development plan.
- ☐ **Weekly check-ins:** Attend weekly meetings to address ongoing concerns.
- ☐ **Training and career development:** Plan for further training.
- ☐ **Personal development:** Assign 2 hours weekly for personal development or learning.

- ☐ **Team interaction:** Encourage and facilitate team interactions and organize informal team gatherings.
- ☐ **Inspirational resources:** Provide resources such as team collaborations, books, and online courses.
- ☐ **Onboarding adjustment:** Adjust process for the next 60 days as part of the 90-day plan and 6-month trial period.
- ☐ **Feedback and reviews:** Ongoing feedback and progress reviews.

Take the time to build a formal preboarding plan that you can activate whenever you need it – to ensure successful hires. Building a repeatable preboarding process ensures that all new hires experience the same high-quality early Employee Experience.

Remember, your preboarding sets the expectations around the onboarding in general and the Employee Experience that your organization will deliver.

Want to see how Learnifier can **help you streamline** your pre- and onboarding and make the process **engaging** for the new hires and time-efficient for you?

Talk to us!
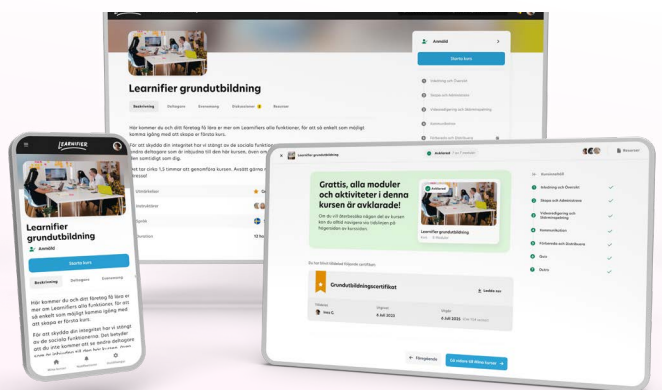
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