The Preboarding Checklist:
How to excite, engage, and prepare your new hire before Day 1

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The trick to quality employee retention is top-notch onboarding.
But now that we see an even shorter employee life cycle and big competition, there seems to be a focus shift from retention to productivity. In order to create more productive employees faster, you need to think about Onboarding as a process over time. From contract signing

So, how do you create a smooth, engaging onboarding process that rides the wave of 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, you might ask?

A great place to start is to work around 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 so that it informs, engages, and prepares the new hire and your organization for success.

RECRUITING & SIGNING THE CONTRACT

☐ Welcome onboard from hiring manager (letter/email)

☐ Hi from team members (email or even better video)

☐ Overview: This is what will happen before and after your 1st day

☐ Here is Your Onboarding Playbook (option to add own questions)

PRE-BOARDING

☐ This is your new office and your desk (option: add co-working "neighbors")

☐ Job description + informal message from the hiring manager

☐ Intro to the company
   ○ Organogram
   ○ Welcome video from the CEO
   ○ This is the heart of our company and how we work (culture & routines) * The Zappo company is an interesting example

☐ Forms to collect employee data

☐ Practicalities
   ○ Working hours & vacation
   ○ Flexibility
   ○ Dress code
   ○ House rules

☐ Introducing tools and software access
   ○ Purpose
   ○ Expectations & timelines
   ○ Here is your computer – waiting for you
   ○ We are ordering your mobile (which one do you want?)
   ○ Do you want to keep your current number? (do this)

☐ Counting the days – hello from colleagues/manager

☐ Send us a short intro about yourself (to be shared with your team)

☐ [1 week before start] Our address and office (how to get there)

☐ Short questionnaire: How does it feel so far? Something your wonder?

☐ [3 days before start] Call: Got questions/answer questions

☐ [Reminder 1 day before start] See you tomorrow! (email/SMS message) This is your 1st-day schedule

GIVE CLARITY ABOUT THE FIRST 90 DAYS

1st day

- ☐ Meet-n-greet with hiring manager + team –
  * incl. breakfast like at Twitter
- ☐ Here is your desk, tools, and notebook
- ☐ Present role, goals, and projects with the hiring manager
- ☐ Expectations and support to succeed
- ☐ Lunch with team
- ☐ Meet your mentor
- ☐ Tour of the office
- ☐ Invite collaborating departments for coffee-break / fika / cake
- ☐ Present 1st-week schedule

1st week

- ☐ Assign the first project
- ☐ Lunch dates with different team members
- ☐ Check-in with HR (making sure all paperwork is in place, taking the temperature)
- ☐ End-of-week check-in and room for questions
- ☐ Expectations and outline of the 1st-month plan

1st month

- ☐ Elaborate on long-term goals
- ☐ Book weekly check-in meetings
- ☐ Growth plan (training, career, etc)
- ☐ Assigning 2 hrs weekly to personal development /learning time
- ☐ Encourage team interaction
- ☐ Provide inspiration for progress (team collab, books, online courses, etc.)

- ☐ Review and adjust the onboarding process for the next 60 days (part of 90 days plan and 6 month trial period)
- ☐ Short questionnaire: How is it going? (Purpose: what does the recruit need now, how can we improve this onboarding, etc.)
- ☐ Continue your onboarding and give clarity around the next 90 days and the first 6 months.

Finally, building a repeatable Preboarding process makes sure that all new hires share the same excellent (though partly customized) early Employee Experience. And remember, your preboarding sets the expectations around the Onboarding in general and the Employee Experience that your organization will deliver.

Take the time to build a formal preboarding plan that you can activate whenever you need it – to ensure successful hires.

Want to see how we at Learnifier can help you digitize your preboarding – making the process engaging for the new hire and time-efficient for you?

How to setup a compelling digital Pre- and Onboarding that saves you time. Every new hire.

Conveniently engage all new hires, automate workflows and elevate the organization for more success.

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