

# The **ULTIMATE** preboarding checklist for new hires\_

bridging the all-important  
sign-to-start gap

→ Talentech



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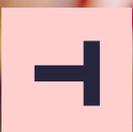
# The process stuff

Effective preboarding is proven to lead to higher retention rates, improved job satisfaction, and increased productivity.

Administrative tasks play a vital role in this process by providing necessary documentation, outlining policies and procedures, and facilitating communication between the new employee and various departments within the organization. In this sense, administrative tasks serve as the backbone of preboarding, ensuring that the process runs smoothly, and setting the stage for a successful employee–employer relationship.



- Ensure your new hire's **contracts and support documentation** is reviewed and signed.
- Sign the **payroll documentation** and explain the process to your new hire.
- Share **employee benefits** and leave entitlements with your new hire.
- Organize your new hire's **email and IT requirements** as well as access to CRMs, intranet, and any other applicable systems.
- Explain your company's **dress code** for both in-office and remote new hires.
- For both remote and hybrid new hires, share **tips on creating a great home office** environment.
- Connect your new hire with their **main point of contact** for Day 1.
- Create a **schedule** for your new hire's first day.



# The culture stuff

It's important to go beyond the logistical aspects of preboarding and prioritize the human element. Culture and fun play a vital role in the pre-start process and should not be overlooked. Getting this right can have a significant impact on employee morale, community building, and overall success in their new role.

To incorporate your company's unique culture into the preboarding journey, consider tasks and activities that infuse your organization's values, mission, and vision – and don't forget to think of ways to make these tasks, fun, interactive and engaging.



- Send your new hire a **welcome pack** with company swag, a heartfelt welcome letter, and any materials they might need.
- Share a **"day in the life" video** that shows your new hire what a typical day at your company looks like.
- Introduce your new hire** to the team via video chat before their first day.
- Have any team members who will be absent when your new hire starts record **individual, 30-second welcome videos**.
- Share a company **playlist** with songs that represent the company culture.
- Connect your new hire with a **preboarding buddy** so they have someone to go to with general questions.
- Share a short **video on the company's mission & culture** that tells the story of the organization's founding.
- Share some resources that communicate your take on **diversity and inclusion**.



# The extra stuff

Providing the necessary information and resources is not always enough to make a lasting impression on new hires. Going the extra mile during preboarding can significantly enhance the employee experience and set the stage for a long-lasting and productive relationship with the company.

By providing ample opportunities for communication, offering additional resources and support, and creating a welcoming and inclusive environment, companies can significantly improve their preboarding process and create a positive first impression for their new hires.



- Host a **virtual scavenger hunt** to get your new hire excited about their new role.
- Invite your new hire to an **in-person team-building** activity or happy hour before their start date.
- Connect your new hire with a **mentor** (different from a buddy) who they can go to with role-specific questions.
- Send **birthday or other holiday greetings** to your new hire before they start (if that happens during that time).
- Encourage your new hire to **connect with team members on social media or LinkedIn** before their start date.
- Send your new hire a **virtual office tour** or a 360-degree video of the office space.
- Host a **virtual "meet the executives" event** where your new hire can ask questions to company leaders.
- Send a **role-related book** or podcast recommendation to your new hire.



# The day before stuff

As new hires prepare for their first day in their new role, it's natural for them to feel a range of emotions, from excitement to anxiety. The day before their start date is when these feelings may peak, making it an opportune time for HR to check in and ensure that everything is in place for a smooth onboarding experience.

Taking the time for a few final checks can help ensure that nothing has been overlooked and can safeguard the new hire's experience, allowing them to start their first day with confidence and be productive from the get-go.

- Give your new hire a **final call or email** to check they have everything they need.
- Prepare a **reminder checklist** of things to bring along with them on day 1.
- Send over **parking and/or public transport information** to ensure your new hires can arrive with ease.
- Recommend coffee and lunch spots** close to the office to help your new hire feel like a local.
- Re-send the first-day schedule** you shared earlier in the preboarding process, just in case it's gotten lost in the shuffle!

Now sit back, relax and watch your new hires kick off their tenure with your organization **in style!**



# Talk to an expert\_

We can help.

Whether you're ready to invest in preboarding software, or you're simply interested in seeing what's out there and picking the brains of an expert, we want to hear from you!

Get in touch today and let us answer all your preboarding questions. Why? Because good preboarding makes GREAT business sense!



[TALK TO THE TEAM](#)

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