# **Pre-boarding Tasks to Complete Prior**

# **to the New Hire Arriving**

**Overview:** This Pre-boarding checklist will give you a strong foundation upon which to build your own.

**Rationale:** The more thorough a job you do ahead of time preparing for your new employee’s arrival, the more positive and impressive your first impression. As discussed in*Onboarding Faster, Smarter, Better* teleseminar series,a poor first impression and poorly executed onboarding process sends a message to the new hire that their new employer is a shoddy, poorly run outfit that won’t do their part to help them succeed. Conversely, a welcoming first day and well executed onboarding process communicates “This is a top rate company, run by winners who will do their part to help you be successful.” This checklist helps you make sure you have everything in place to communicate the latter message.

|  |  |  |  |
| --- | --- | --- | --- |
| **General** | **Person Responsible** | **Due Date** | **Completed** |
| Determine New Hire’s First Day |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Welcome Package** |  |  |  |
| Welcome letter |  |  |  |
| Welcome letter to spouse (if information known) |  |  |  |
| Information about the area if new to the area. |  |  |  |
| Testimonial from customers, patients, etc. |  |  |  |
| Information on what to expect on the first day/first week. |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Welcome – Other Possibilities** |  |  |  |
| Email or voice mail from hiring manager and/or team members. |  |  |  |
| Include link to video clips from the New Hire Portal |  |  |  |
| Welcome card from peers. |  |  |  |
|  |  |  |  |
| **Welcome Basket Preparation** |  |  |  |
| Welcome Basket: Logo gear, if new in the area—area guide etc. |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Technology and Logistical Set Up** |  |  |  |
|  |  |  |  |
| Business Cards Ordered |  |  |  |
| Card Key |  |  |  |
| Cell Phone |  |  |  |
| Laptop |  |  |  |
| Computer Assigned |  |  |  |
| Computer Login Assigned |  |  |  |
| Resource Center Website Login and Password |  |  |  |
| Credit card Obtained |  |  |  |
| Email Address Created |  |  |  |
| Office Key Created |  |  |  |
| Office Supplies Provided:   * Paper * Paper Clips * Pens * Stapler * (other): |  |  |  |
| Parking Pass |  |  |  |
| Phone Extension Assigned |  |  |  |
| Works Space Assigned |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Human Resource Information** |  |  |  |
| HR Packet Created:   * W-4 * I-9 * Direct Deposit Form * Health Insurance Enrollment Form * Non-Disclosure Agreement * Phone List with Job Descriptions |  |  |  |
| Human Resources File Created |  |  |  |
| Mark off 90 Day Eligibility Date (Health Ins/401K) |  |  |  |
| Payroll info completed |  |  |  |
|  |  |  |  |
| **Employee Manual** (online preferably) |  |  |  |
| Org chart with position descriptions |  |  |  |
| “Go to People” information with phone numbers |  |  |  |
| General phone directory |  |  |  |
| Phone directory of key contacts and position descriptions |  |  |  |
| Links to key information on company website and New Hire Portal |  |  |  |
| Key schedules   * Payday * Expense Reports Due * Training Report Due * Weekly Sales Activity Report * Weekly Forecast * Territory Development Plan |  |  |  |
| FAQs & SAQs |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Introducing New Hire** |  |  |  |
| Email announcing new hire |  |  |  |
| Internal social media posting |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **“Set up for Success” Preparation by Hiring Manager** |  |  |  |
| Review job requirements. |  |  |  |
| Identify KRA and high value activities. |  |  |  |
| Review Hiring Manager Checklist |  |  |  |
| Characteristics of a successful person in this position. |  |  |  |
|  |  |  |  |
| **Mentor or Buddy** |  |  |  |
| If select prior to first day, make selection. |  |  |  |
| Review with mentor/buddy their role and responsibilities. |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| **Orientation and Learning Program** |  |  |  |
|  |  |  |  |
| Review orientation schedule and make sure all items are ready to go. |  |  |  |
| If applicable, set up training dates. |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |