



A Preboarding Checklist to Instantly Engage New Hires

Download this free checklist for a step-by-step guide to preboarding new employees

What you'll find below

A great preboarding experience lays the foundation for a positive work experience. Between accepting an offer and their first day, new employees can feel anxious and unsure. A preboarding checklist helps you give them a head start on tasks and build a sense of connection.



Complete all admin tasks

- Ensure the offer letter is reviewed and signed
- Ask for the necessary details to set up payroll
- Share employee benefits and perks and how to avail them
- Grant them access to all the necessary tools through a tool like 1Password
- Explain the dress code if there is one
- Ask for government mandated employee documents and have them fill out tax forms
- Offer tips to set up a home office and make use of the home office budget
- Introduce them to their main point of contact (manager or [mentor](#) or both)
- Create and send a schedule of preboarding and [onboarding](#) activities

Build a positive culture

- Create and send a welcome pack - a welcome message, a personalized video and company swag
- Share “a day in the life of” video from their peers in a similar role
- Introduce [new hires](#) to the team via video or an in-person hangout
- Share a company playlist that represents the company values





Connect your new hire to their [preboarding buddy](#)



Have department heads and senior leaders welcome the new hire personally



Ask the CEO to record a video that speaks to the company's mission and goals



Share resources on [diversity, equity, inclusion and belonging](#) initiatives

Bonus: for virtual hires



Host a virtual scavenger hunt or other virtual contests



Invite them to a company offsite to build real, [meaningful connections](#)



Pair new hires with a relevant mentor to help them succeed at work



Send them birthday and holiday greetings



Encourage them to add their new workplace on LinkedIn and connect with team members and other people at the company



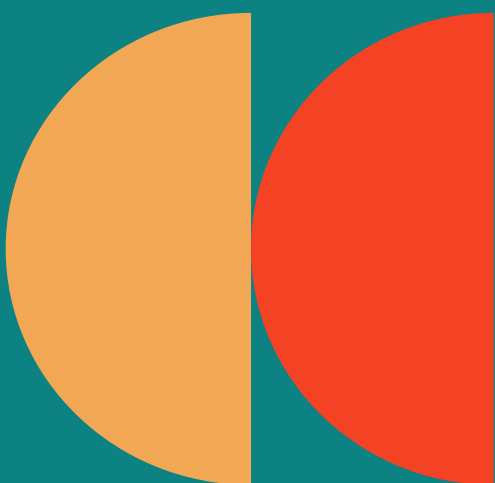
Send them a virtual 360 office tour (recommended for hybrid workplaces)



Host a “meet the leadership” event where they can ask questions about the company's future

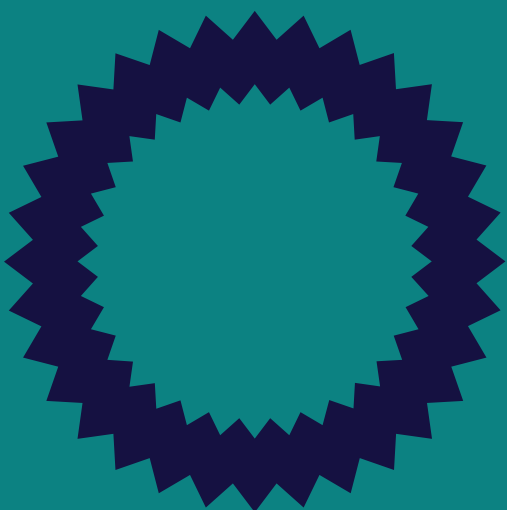


Send them a role-related and employee handbook with all their questions answered



Wrap up pre-Day 1 tasks

- Reach out to new hires over email or call to make sure they're prepared
- Send them a reminder checklist of everything they need to day on Day 1
- Share the office location and transport information so they can arrive on time
- Consolidate a recommendation list (courtesy of local team members) of restaurants, cafes, and other activities they can undertake.
- Have their [mentor](#) and [preboarding buddy](#) check in one last time before the day begins.



Want to see how Together can help with preboarding and onboarding? [Book a demo.](#)