QUICK START

ONBOARDING

SESSION 2:

PHASE #2 Pre-Boarding

The fastest, most practical tools for workforce expansion you will ever see

presented by

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Phase #2: Pre-Boarding

> **If you hire people just because they can do a job, they'll work for your money. But if you hire people who believe what you believe, they'll work for you with blood and sweat and tears.**
>
> *Simon Sinek*

One of the most important and often overlooked steps of welcoming a new employee to the team is pre-boarding. It's the experience you create for your new hire which introduces the full onboarding experience. Not only does it increase the new starter's excitement, but it also fosters a relationship before the more formal stages of orientation and induction.

The pre-boarding phase is, quite simply, all about setting the stage for your new employee's engagement before they even show up for their first day.

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Pre-Boarding Fast Facts

A 2019 study by Indeed shows the dilemma employers face. 22% of employers who were unsuccessful in filling their vacancies reported that the selected candidate had accepted the job offer but didn't show up on their first day.

TalentVine says "the period between the acceptance and their start date is actually the time of greatest risk."

Today, 51% of business leaders said they have plans to create individualised employee experiences comparable to consumer experiences. A keen focus on employee experience will be key for the future of work.

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The 4 Pillars of Pre-Boarding

These are the items to be covered in this phase to address each of the four key pillars of a successful Onboarding Program:

CULTURE

Express the vision, cultural values, quirks + what makes the team unique.

OUTCOMES

Ensure your new starter understands how their role directly contributes to the overall team + business goals.

ADMIN

Streamline new starter admin + remove obstacles to enable new starters to focus on early learning.

TEAM

Arrange a 'buddy' + communicate with the new starter prior to day one to ensure they develop a sense of belonging.

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Paving The Way

Before the new starter commences their first day of work with your company, do your homework to prepare for their engagement. Develop clear processes to help you implement every part of your own customised pre-boarding sequence. Getting creative and having fun with the sorts of things you can do can only help to set the stage for your new employees. From the basics to the extras, this list will help you identify every way to make your new staff member feel valued and welcome.

It will be important to engage with your new starter before they actually come in to work for their first day. This is a particularly vulnerable time for them. It is unlikely yours has been the only company they have sought work from.

It is realistic to assume they will be receiving notifications about other applications they have submitted in the period before their first day with you. They might even have other interviews lined up as they finalise their choice of employer.

Making your company attractive and compelling to your new hire is the name of the game at this phase. Muster up every part of your company's charisma to actively demonstrate that you should be their number one choice. Leave no doubt in the new starter’s mind that everyone in your team is looking forward to their start date. Show them that the work they will do with your company really matters and will contribute to something truly significant. Smooth the pathway for their commencement to replace any uncertainty or reservations with clarity and confidence.

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Culture In Focus: Company Values Pack

Communicating the central pillars of your company culture is a vital aspect of preparing your new starter for their first day with your company. You can be certain that your new hire has their mind on your company in the days leading up to their official start date, but they might also be evaluating other options. Use this time of heightened awareness to connect with your new employee by sharing the vision and mission of your company. If you do not already have a Culture Pack to help welcome new team members, consider these fundamental elements:

- What is the Vision & Mission of your company?
- What are the core values of your company?
- How did your company begin?
- What are some of your company's significant achievements or milestones?

Create a short description of your company and what it stands for:

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Team Touch Points: Pre-Boarding Brainstorm

Working with your existing team is an important part of facilitating warm, friendly connections with the new starter from the outset. By involving your current staff members in the development of the Onboarding Process, you will create a company ethos built on relationship, investment and mutual respect. If you are employing your first hire, you will still benefit from doing this brainstorm with a trusted friend or colleague. Two minds are definitely better than one for exploring all the options.

Organise a meeting with your team (face to face or online) to brainstorm ways that they would like to welcome their new workmate. If you are meeting in person you can grab a pile of sticky notes to write each idea on. If this meeting is remote, share a document in Google drive so everyone can pitch in. For this first brainstorm, don't worry about considering limits of time, budget or feasibility. The best ideas will come when there are no restrictions! Remember to consider:

- Messages that could be sent in the week leading up to their first day
- Gifts that could be delivered in that week
- The buddy that will be matched up to the new starter to mentor them through
- What they want to organise for their first day
- Who will be responsible for organising each of the items you plan
- Who will take care of delivering on the plans made
- The resources that will be required for each part of the plan
- The date that each action needs to be completed by
- Any mechanisms for accountability to ensure the tasks actually get done

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Task	Due Date	Person Responsible	Required Resources

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Activating Outcomes: Welcome Message

Facilitating connections between new and existing team members is a high priority in an effective Onboarding system. Employees need to feel warmly welcomed to their new workplace so they can confidently find their feet and settle in quickly. Just because your new starter isn't actually scheduled to commence work with you and your team doesn't mean those connections can't begin. Develop a Welcome Message to send to your new hire a week before they start. Play around with ways to make this message fun and engaging. You could include GIFs, songs or videos in an email, or send a parcel to their postal address to ramp up the excitement! Remember these things in your Message:

- Warm welcome
- Start date, time and address
- Day 1 Agenda
- A "Hello" from the team
- Introduction to their buddy
- Invitation for questions

Write your Welcome Message here. If you want to create a welcome video or even a song, go right ahead! Make sure you work now to embed the recording into the email template or include a link to it online so it is ready to go by the time you finish this module.

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Pre-Boarding Checklist

Whether your new team member will join you onsite, or work from a remote location, their commencement can be a very busy, and often chaotic time. Having a documented system to guide you and your team through the creation of a standout experience for your new starter is essential. A clearly laid out checklist to itemise exactly what to do and when to do it in the time leading up to their first day will remove the risk of forgetting anything or becoming confused and stressed.

Your Pre-Boarding Checklist should include sending your Welcome Message to your new starter at least one week before they arrive. You should also plan to call them two days prior to their commencement (or on the Friday before commencement on Monday). Let them know you're looking forward to seeing them and that you're available to cover any queries they may have. It is also a good opportunity to re-confirm their starting time, where they need to be, and who will be welcoming them to the business. If their commencement will occur exclusively online, ensure that the new starter is well aware of the systems they will need to have prepared, and that access has been set up for them.

With those two essential items squared away, you have all the room in the world to get creative. Think about how you can demonstrate the core values of your company in the most appealing ways, and include all these innovative ideas in your Pre-Boarding Checklist. The sky's the limit! This is a great way to communicate how excited you are for them to join, and also to prep them for success on Day #1.

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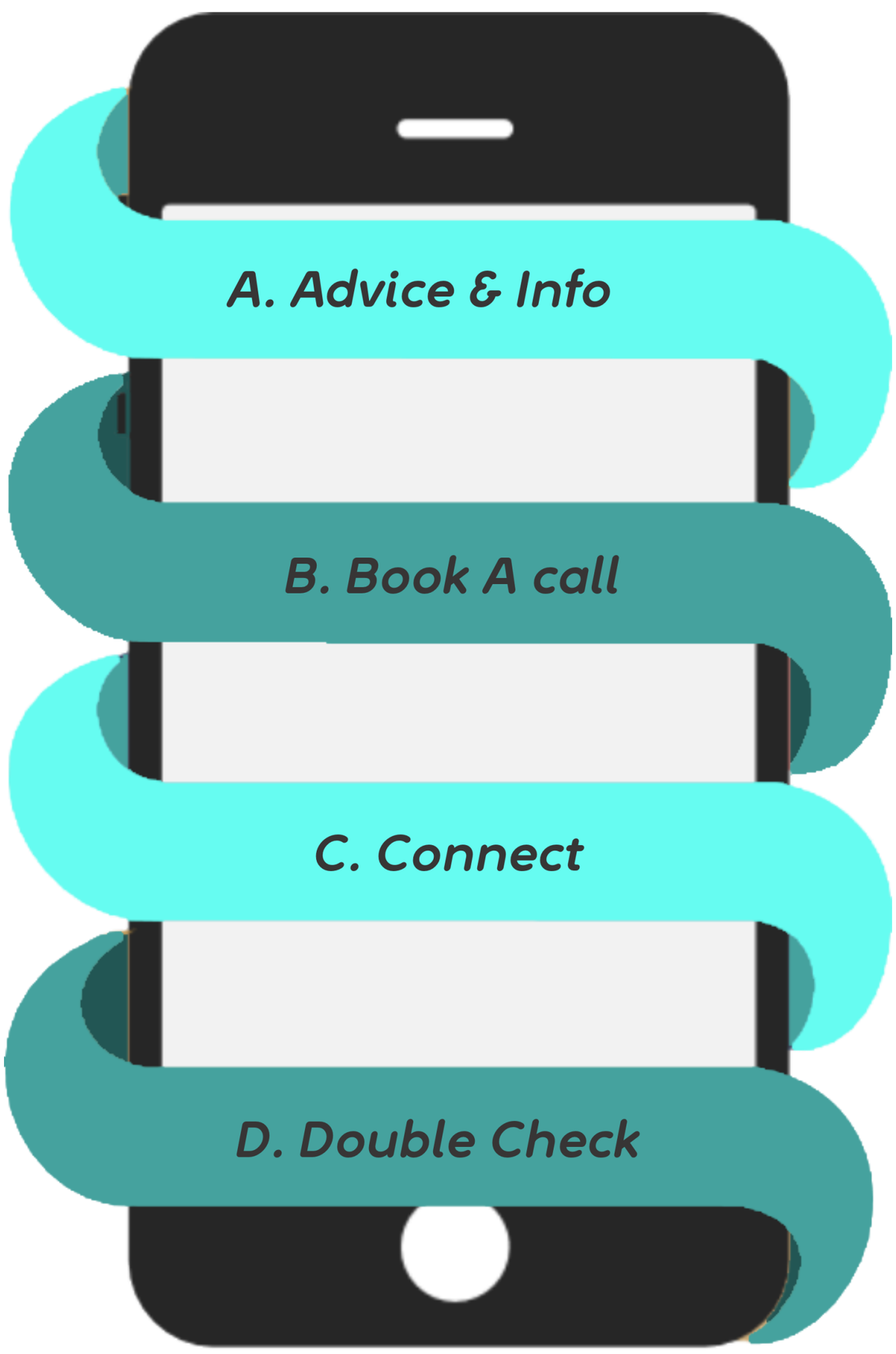
Things To Remember For Your Pre-Boarding Checklist

Following these four steps to develop your own pre-boarding checklist will help to ensure you don't miss some of the important aspects of preparing a warm, well-organised welcome for your new starter, even before they actually come in to work.



A ADVICE & INFO

To form a great impression, ensure that an offer with all the supporting information is sent to the New Starter ASAP.

B BOOK A CALL

Ensure that you arrange a call or text from yourself and/or a team member of the new starter.

C CONNECT

Ensure that the new starter is contacted at least two days prior to commencement (or the Friday before a Monday commencement) to communicate how excited you are to have them starting at your company.

D DOUBLE CHECK

Double check that you have completed the checklists, and everything is ready for Day One.

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Administration In Action: Pre-Boarding Checklist

Your aim in the Pre-Boarding phase is to do everything you can to make your new starter feel confident and excited about working with your company. There's no limit to what you can create! Before you tackle this checklist, you should already have done your Pre-Boarding Brainstorm with your team, or with a trusted friend or colleague. Refine the list you made with them by organising the ideas you wish to keep, and discarding the rest. You will end up with a realistic list to create a warm, professional welcome.

By bringing together several carefully developed steps you will convey a professional message to set the tone for your new hire's work before they even arrive. You will also be able to communicate essential information in ways which actively reflect the ethos and culture of your company.

Go ahead and conduct your brainstorm, then create your own Pre-boarding Checklist.

Days Before Start	Pre-Boarding Item	Required Resources

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Next Steps

Well done! You're already well on the way!

In this session we have established a crystal clear plan to welcome your new hire to their new role before they commence. You have clarified the core tenets of your company culture and used these to develop a Welcome Message and a Pre-Boarding Checklist to engage your new team member in the time leading up to their first day.

In the next session we will map out how that First Day will run. We will run through the sorts of things you need to consider on this first day, and how best to prepare to make the day a success. You will develop your own customised resources which work to:

- Convey how things are done in your workplace
- Clarify the requirements of the new starter's role
- Tick essential administrative boxes
- Facilitate team connection and rapport

Onward and upward!

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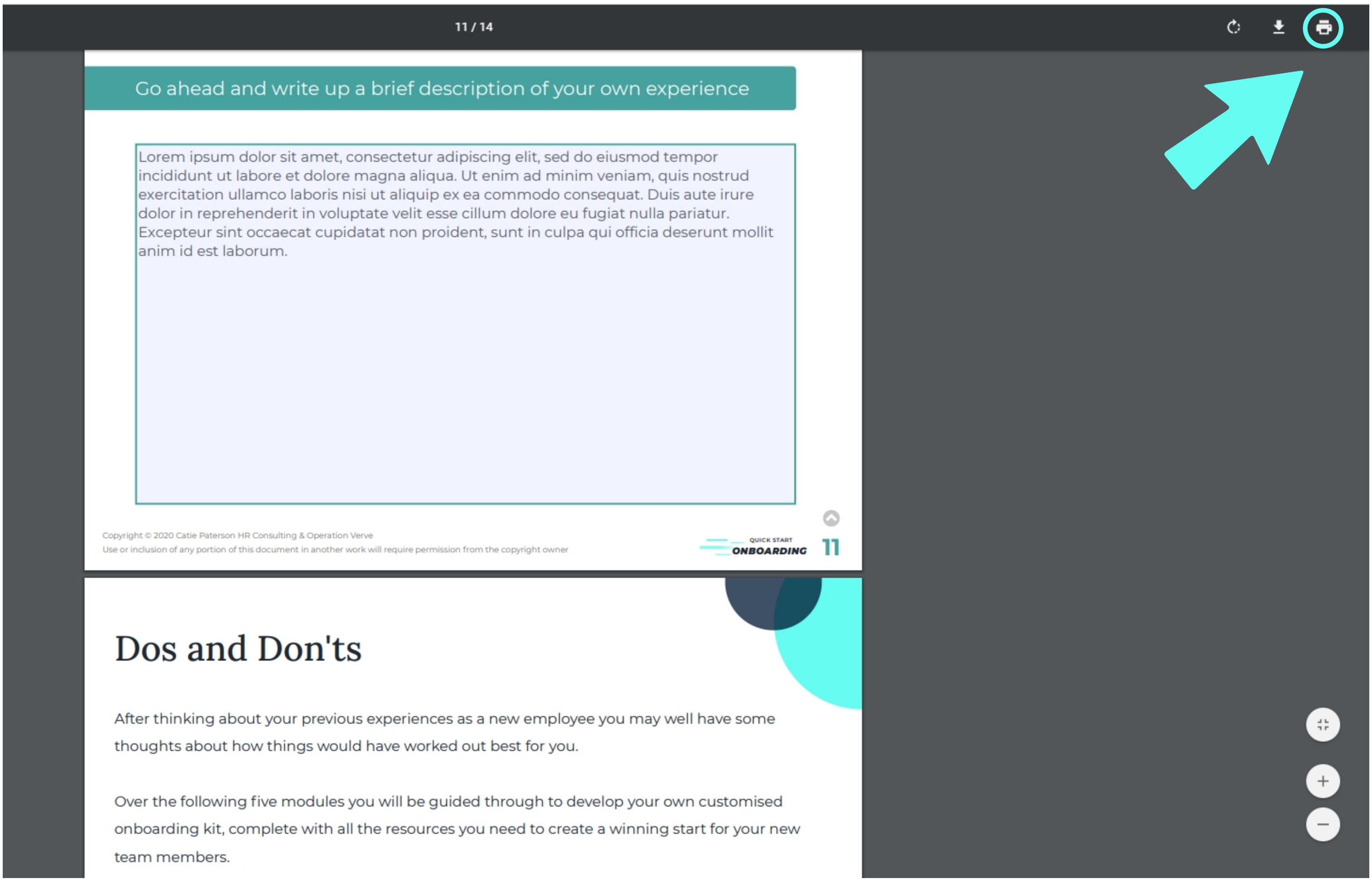

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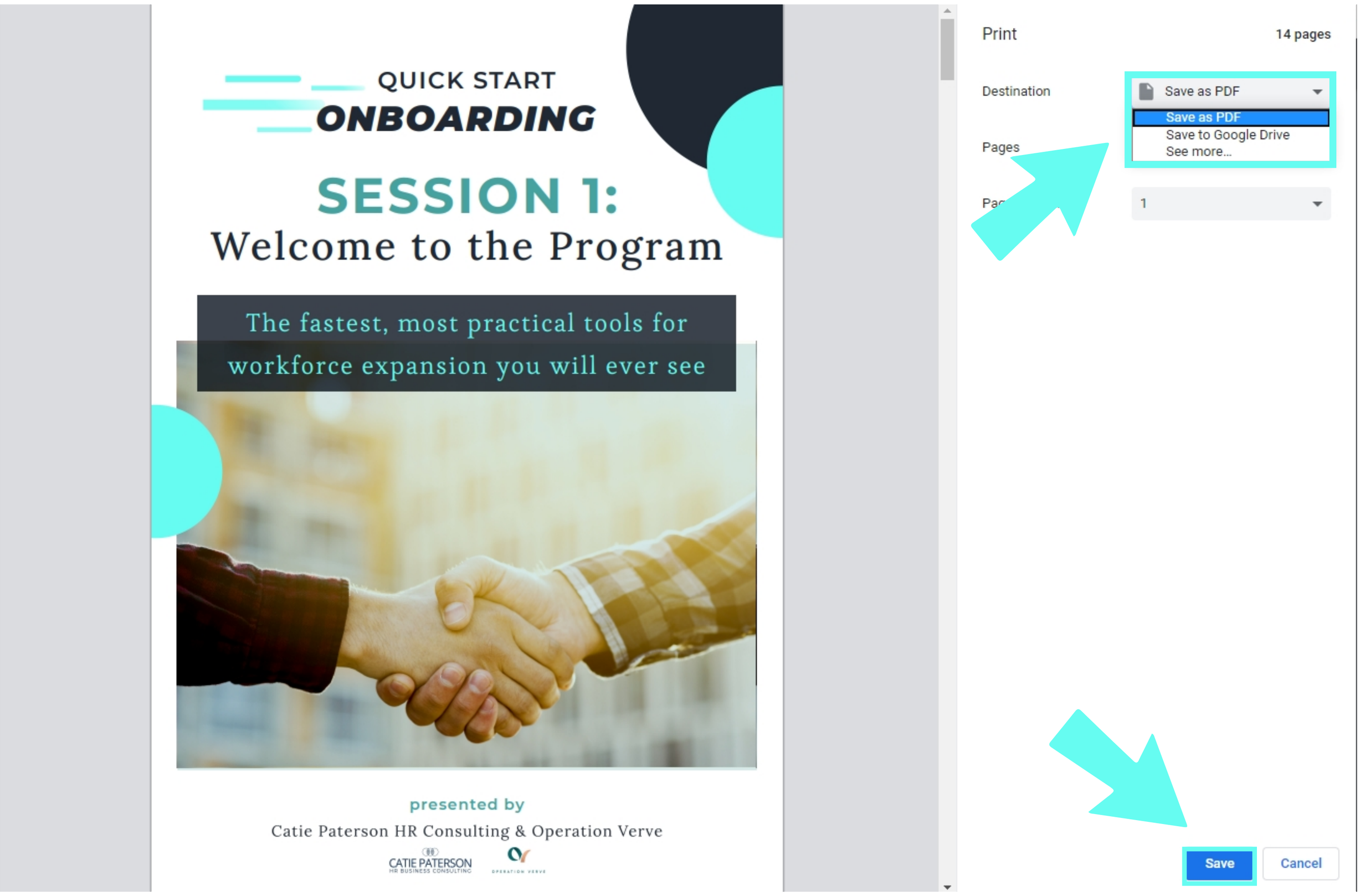

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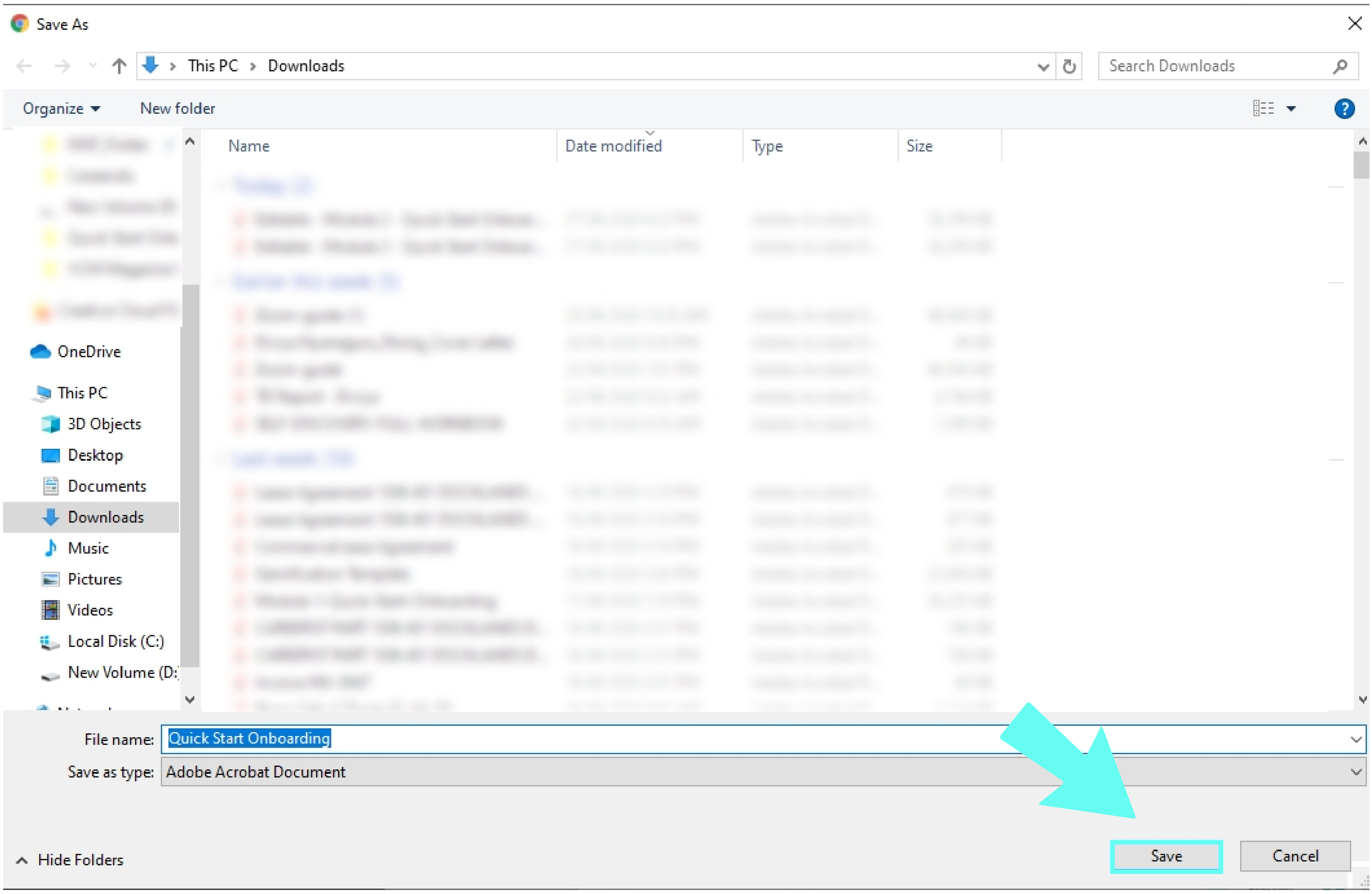

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