



The Ultimate New Hire Pre-Boarding Timeline

How to Excite, Engage,
and Wow New Employees

with Onboarding Expert Kevin Sheridan

an eBook from **alex**[®]

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Introduction

“One out of every 25 new employees quits on their very first day.”

Source: Modern Survey. (2011). [Onboarding Report Card].

Unpublished raw data.

The way new employees are treated on their first day is extremely important in building a long-term relationship. As with any new relationship, first impressions count.

Employees will form an opinion on what it is like to work for your company from the moment they walk in on their first day.

Simple best practices can make the difference in winning them over right away. Alternately, several hiccups can send the message that you couldn't care less whether new employees stay or go.

In the following pages, we'll walk you through some simple steps you can take to ensure your new hires feel taken care of and excited about their new positions.

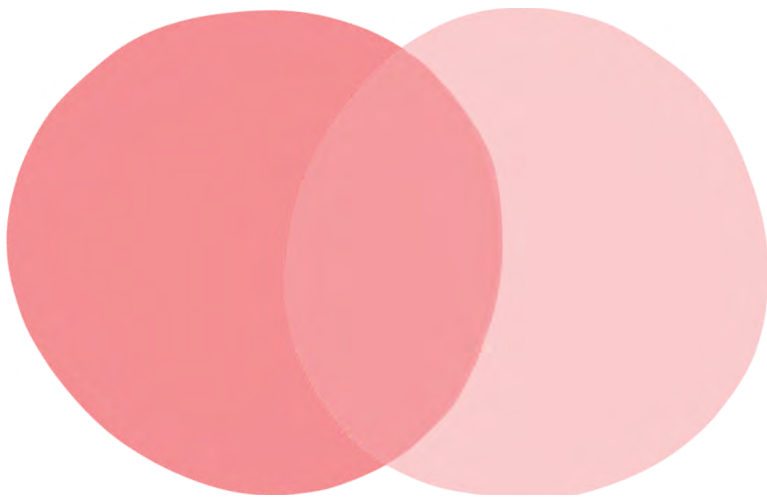
The Four Cs of Onboarding

Before we get into the best practices timeline for preparing for a new hire's first day, let's talk about something Kevin Sheridan describes as "The Four Cs" of Onboarding."

Sheridan coined the Four Cs concept at his human capital management consulting firm, HR Solutions, after measuring and tracking commonalities among companies with high levels of new hire satisfaction and employee engagement.



The Four Cs of Onboarding



Connection

Personal relationships and support new hires require to be effective.

The Four Cs of Onboarding



Context

Clarifying the job requirements and expectations.

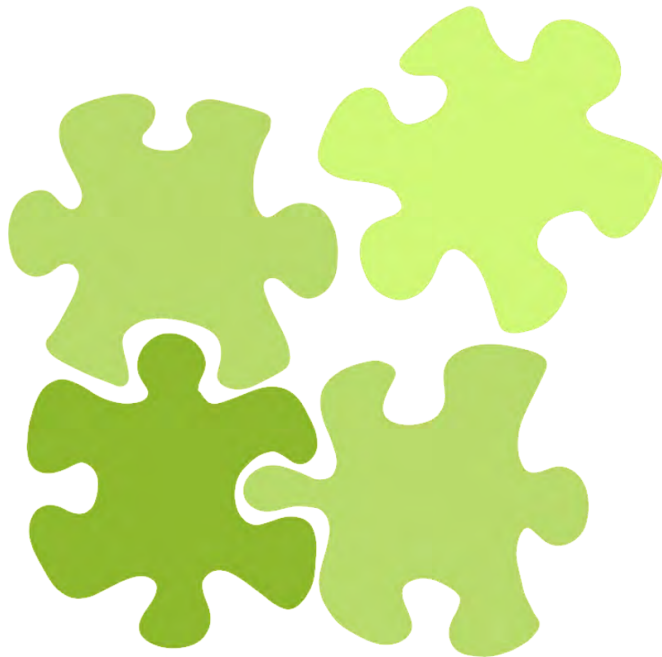
The Four Cs of Onboarding



Compliance

Paperwork and “boring details” surrounding tax forms, employment agreements, badges, email accounts, etc.

The Four Cs of Onboarding



Culture

Making people feel that they fit into the “invisible architecture.”

Introducing Jenn, Your New Hire



Meet Jenn. Jenn has all the skills and experience you need to make your organization even better than it is today. She's a perfect match for the open position you have, and comes highly recommended by some seriously noteworthy references. We're not saying one of them is a sitting head of state (because that would be untruthful), but everybody who's worked with her has nothing but positive things to say.

Oh, and she's not an axe murderer.

Jenn's background check came back clean as a whistle—and that's a good thing, because your team has completely fallen in love with her. Everyone in your organization, including Jenn's hiring manager and future coworkers, think she's the cat's pajamas.

Want to bring Jenn onboard and make sure she falls in love with your company too? Here's what to do:



Jenn's Timeline (Pre-Boarding)

Offer Letter



It's time to take your relationship with Jenn to the next level by extending a formal offer letter. Make sure your letter isn't boring! Abandon the forgettable form letter template you've been using and try for something personalized instead.



[View Boring
Form Letter](#)



[View Awesome
Personalized Offer](#)

Your candidate, Jenn, has become your new hire! She's accepted your offer and settled on the timing of her first day. All you have to do now is wait for her to show up right? Wrong....

The best onboarding starts the moment you start drafting your offer letter and continues through the new hire's notice period with her previous employer to her first day at your company. This "pre-boarding" before the first day is crucial—remember, your new hire may have accepted your offer, but she still has options. She could always change her mind, or be poached away by a competitor.

If you want to keep Jenn excited about her new role, you must give her constant and consistent communication.

Jenn's Timeline (Pre-Boarding)

Say Congratulations



Gather everyone who interviewed Jenn and have them write her a special note of congratulations. The notes don't have to be long! Something that would fit on the back of a business card is more than enough to get the point across. In fact, have everybody write their notes on the backs of their business cards and put those in the mail right away.

Get the Boring Stuff Out of the Way



Why would you make Jenn fill out a bunch of boring paperwork on her first day when you can just as easily send her I9, policy manual acknowledgment form, and other snooze-inducing (but important) documents ahead time? Jenn's first day should be fun and celebratory, so use an electronic signature service like DocuSign, Adobe eSign, or RightSignature to collect all the necessary John Hancocks before she arrives.

And don't forget about Jenn's benefits information! Even if Jenn won't be able to actually enroll until some point in the future, be sure to send her electronic versions of your company's benefits materials. Even better—send her your company's ALEX link.



USE ALEX!

Sending new hires like Jenn a link to your company's version of ALEX is a great way to help them understand and appreciate their benefits options. It can also help them get ready to make their choices for when it comes time to enroll.

Jenn's Timeline (Pre-Boarding)

Give Jenn a Place to Be



If you haven't identified where Jenn's workspace is going to be, now's the time to do it. She needs to have a place to work, so make sure her office or desk is assigned and ready for her when she arrives. This also means making sure Jenn is set up with everything she needs to start working the moment she arrives. Her computer, phone, email, and logins for any special accounts should be ready long before she shows up on her first day.

Make It Extra Special

Once you've got Jenn's computer and logins for key accounts, give her a head start. Fill in her address book or contacts with the information of people she'll be working with the most, and log important meetings and activities into her calendar.

Help Everyone Get to Know Jenn



Create a "Personal Fact Sheet" for Jenn and post it prominently in the break room or other high-traffic area.



[View Jenn's new employee fact sheet](#)

Jenn's Timeline (Pre-Boarding)

Assign Jenn a Mentor



You know what's going to be really helpful to Jenn when she shows up on her first day? A mentor. A work buddy. An office chum. A lunch compadre. Whatever your organization calls the helpful people who can give new hires advice on where to grab lunch or order office supplies or make computer repair requests? Give Jenn one of those.

Keep Jenn in the Loop



Be sure to send Jenn an itinerary of what she'll be doing and who'll she'll be meeting on her first day. Err on the side of over-sharing—give her directions to the office, let her know where she can park if she drives, set a hard start time for her to arrive, and provide a detailed summary of what she'll be doing throughout the day.



[View Sample Itinerary](#)

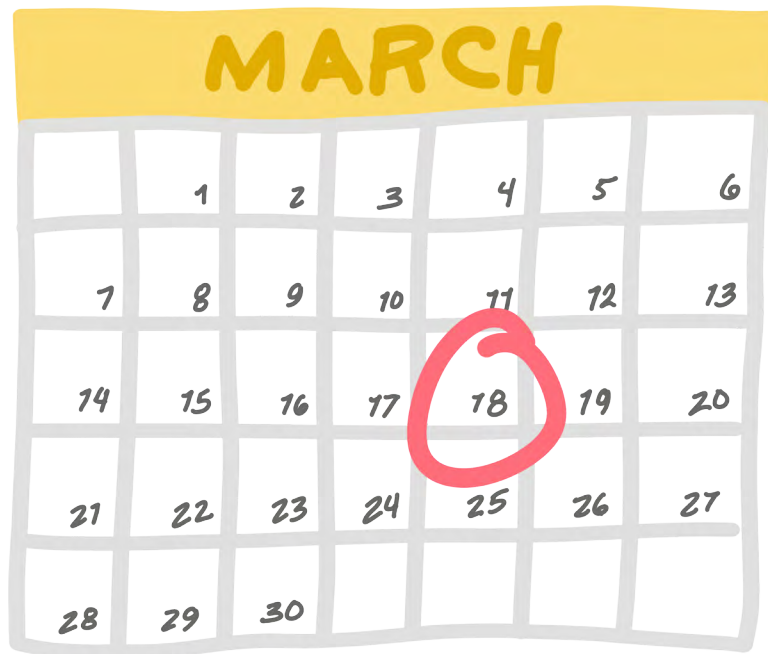
Jenn's Timeline (Pre-Boarding)

Make It Extra Special

Is Jenn going to be driving to work on her first day? Be sure to send her directions to the office, including where she should park. Talk to your building's facilities team and see if you can reserve her a special parking spot for the day, then arrange to have the space decorated with welcome banners, signs, and streamers.



Jenn's Timeline (First Day)



Meet Jenn at the Door



It's Jenn's first day! Everyone should be excited, especially Jenn. Don't make things weird for her by expecting her to know exactly where to go. Make sure her manager is ready to meet her at the door when she arrives.

Make It Extra Special

If you took the time to ask Jenn to list three of her favorite inspirational songs in her pre-hire paperwork (wink wink), you can arrange to have music playing for her once she arrives. **(continued on next page)**

Jenn's Timeline (First Day)

Give Jenn the Lay of the Land



Jenn's probably been to your office before to interview, but that doesn't mean she knows where she's going. Take a few minutes to show her around the office. If she needs a keycard or access code for the bathroom, give her one, for goodness' sake! If you have a breakroom, show her where it is. The point of this tour isn't to introduce her to people—that will be done later—so give her time to focus on getting her bearings.

Show Jenn to Her Desk



Since you're on top of things and following best practices, Jenn's workstation will be ready. You're so good at your job! Just make sure that there's nothing from the previous desk's occupant in the drawers—there's nothing worse than finding old gum wrappers or packets of soy sauce in what's supposed to be your new space.

Make It Extra Special (Continued)

Build a time machine and go back to the point in the interview process where you knew you wanted to make Jenn an offer, and have someone ask her, "What's your favorite type of candy?" (If you don't think you can build a time machine, just remember to do this step before you give her an offer.)

After the question is asked, get back in your time machine and travel to the morning of Jenn's first day. Place a candy dish on her desk filled with whatever treat she said she loves the most.

You can also send an email to her new coworkers saying, "Jenn, our newest employee, starts today. Her favorite candy is Gummy Bears, and there's a bowl of them on her desk. Go get some and welcome her to our team!"

Jenn's Timeline (First Day)

Introduce Jenn to the Team



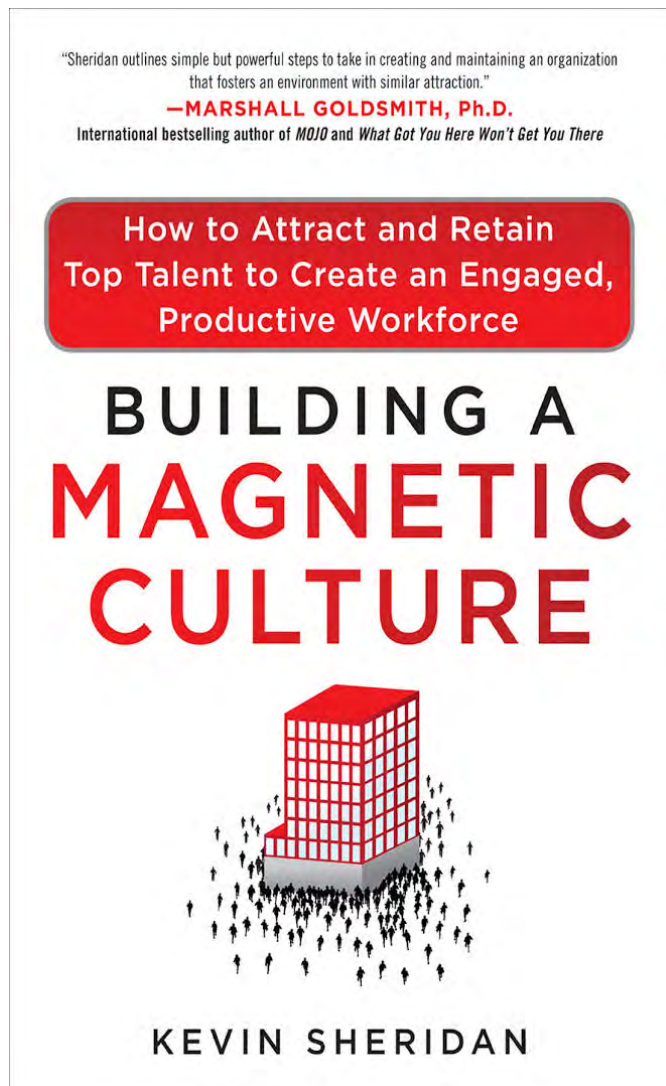
Once Jenn's able to find her desk and get her bearings, introduce her to the rest of the team. This should be a light-hearted event that provides everyone a chance to get to know one another. You want to give Jenn the opportunity to share her background, hopes, and aspirations, but don't be afraid to start things off with a ice-breakers around topics like favorite movies, music, or ice cream flavors.

Set Jenn Up for Success



You've learned a lot about Jenn during her interview process, but now's the time to zero in on what will make her happy in her new role. Be sure to have Jenn's manager ask her about her personal engagement drivers (see page 19). And just in case Jenn might be a little slow to open up right away to her boss, make sure her assigned mentor gets the chance to talk to her as well.

Jenn's Timeline (First Day)



ENGAGEMENT DRIVERS

In his New York Times Best Seller, *Building a Magnetic Culture*, Kevin Sheridan outlined 10 key drivers of early engagement—the factors new hires find most influential toward their engagement in a new position. Those drivers, in order of importance, include:

1. Recognition
2. Career Development
3. Direct Supervisor/Manager Leadership Abilities
4. Strategy & Mission
5. Job Content
6. Senior Management's Relationship with Employees
7. Open and Effective Communication
8. Co-worker Satisfaction/Cooperation – The Unsung Hero of Retention
9. Availability of Resources to Perform the Job Effectively
10. Organizational Culture – Diversity Awareness and Inclusion, Corporate Social Responsibility, Work/Life Balance, etc.

Concentrating on these drivers of early engagement before, during, and after your onboarding efforts will put you well on your way to creating a magnetic culture of talent attraction, talent retention, higher productivity, unparalleled customer satisfaction, greater profitability, and better overall business outcomes.

Jenn's Timeline (First Day)

Spring for Lunch



It's a nice gesture, and goes a long way towards making Jenn feel welcome. A big team gathering can be a lot of fun, but also overwhelming for someone new. Try to keep the first lunch more intimate by limiting the party to Jenn's new boss and mentor.

Most Importantly—Give Jenn Something to Do!



One of the most important things you can do for Jenn on her first day is set aside time for meaningful work. Give her something to accomplish so she can feel like she's making an immediate contribution to the team. "Meaningful work" also includes sitting in on work-related (as opposed to getting-to-know-you) meetings, so don't worry about assigning Jenn something too ambitious.

Conclusion

Only 44% of new employees report a positive experience with regard to how they were welcomed to their new organization.

*Source: Modern Survey. (2011). [Onboarding Report Card].
Unpublished raw data.*

Learning the ropes at a new job can be a pain in the butt, but really smart HR pros understand that, and take the extra steps to make sure their companies' new hires are happy and ready to work.

How? By providing strong communication, thoughtful preparation, and plenty of opportunities to turn a nervous new employee's first day into a cause for celebration.

Addendum

Click on any of the items below to view the example.



[View Boring
Form Letter](#)



[View Awesome
Personalized Offer](#)



[View Jenn's New
Employee Fact Sheet](#)



[View Sample
Itinerary](#)

About the Expert



Kevin Sheridan is an internationally recognized keynote speaker, best selling author, and one of the most sought-after voices in the world on the topic of employee engagement.

He spent thirty years as a high-level human capital management consultant, helping some of the world's largest corporations rebuild a culture that fosters productive engagement, earning him several distinctive awards and honors.

Kevin's premier creation, PEER®, has been consistently recognized as a long-overdue, industry-changing innovation in the field of employee engagement. He is the author of the best-selling book, *Building a Magnetic Culture*, as well as *The Virtual Manager*, which explores how to most effectively manage remote workers.

Kevin received a master of business administration from the Harvard Business School in 1988, concentrating his degree in strategy, human resources management, and organizational behavior. He is also a serial entrepreneur, having founded and sold three different companies.



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About ALEX

ALEX — the best SaaS benefits communication platform in the universe — saves HR leaders time and money by guiding employees through difficult health insurance, retirement savings and wellness decisions. Hundreds of companies, including 70 of the Fortune 500® and more than a quarter of Barron's list of the "World's Most Respected Companies based in the US," trust ALEX to transform confusing jargon, legalese, and gobbledygook into useful information and helpful advice for more than 10 million grateful end-user employees. To learn more about ALEX, please visit meetalex.com.

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