



Meritage

Pre-Boarding Checklist

**Creating a New Hire Experience That
Builds Belonging Before Day One**





Introduction

The onboarding experience begins long before a new hire walks through the door or logs into their first meeting.

The period between offer acceptance and start date—often called pre-boarding—is one of the most overlooked opportunities in talent strategy.

During this time, new hires are:

- evaluating whether they made the right decision
- forming emotional impressions of the organization
- building excitement (or anxiety)
- deciding how connected they feel to the company and team

A strong pre-boarding experience:

- increases engagement
- strengthens retention
- reduces no-shows and early exits
- accelerates productivity and belonging

Use this checklist to evaluate and improve your pre-boarding experience.



PRE-BOARDING EXPERIENCE CHECKLIST

Phase 1 - Offer Acceptance (Within 24 Hours)

Goal:

Create excitement, clarity, and confidence immediately after acceptance.

Task	Owner	Complete
Send personalized offer acceptance confirmation		<input type="checkbox"/>
Provide clear next steps and timeline		<input type="checkbox"/>
Share start date, time, and first-day expectations		<input type="checkbox"/>
Send a welcome message from the hiring manager		<input type="checkbox"/>
Send introductory company culture or values content		<input type="checkbox"/>
Provide a point of contact for questions		<input type="checkbox"/>



Phase 2 – Connection & Belonging (1–2 Weeks Before Start Date)

Goal:

Help new hires feel connected before day one.

Task	Owner	Complete
Share team introductions and organizational overview		<input type="checkbox"/>
Provide employee stories, videos, or testimonials		<input type="checkbox"/>
Invite the new hire to connect on LinkedIn (if appropriate)		<input type="checkbox"/>
Schedule an informal welcome conversation with the manager		<input type="checkbox"/>
Assign an onboarding buddy or peer connection		<input type="checkbox"/>
Provide an overview of company’s mission and business goals		<input type="checkbox"/>



Phase 3 – Logistics & Readiness

Goal:

Reduce uncertainty and eliminate first-day friction.

Task	Owner	Complete
Confirm equipment and technology setup		<input type="checkbox"/>
Confirm workspace or remote access details		<input type="checkbox"/>
Provide instructions for system access and passwords		<input type="checkbox"/>
Send parking, building access, or remote login details		<input type="checkbox"/>
Complete the required paperwork before the start date, when possible		<input type="checkbox"/>
Share the first-week schedule or onboarding agenda		<input type="checkbox"/>



Phase 4 – Role Clarity & Early Success

Goal:

Provide direction and create confidence early.

Task	Owner	Complete
Share role expectations and success measures		<input type="checkbox"/>
Provide initial goals for the first 30–60 days		<input type="checkbox"/>
Schedule first-week manager check-ins		<input type="checkbox"/>
Clarify team structure and key stakeholder relationships		<input type="checkbox"/>
Identify early learning opportunities		<input type="checkbox"/>

PRE-BOARDING EXPERIENCE AUDIT

Use the questions below to evaluate your current process.

Communication

- Does communication feel personal or automated?
- Is messaging consistent across recruiters, HR, and managers?
- Does communication reflect your culture and employer brand?

Belonging

- Does the new hire feel welcomed before day one?
- Are managers actively engaged in the process?
- Are opportunities created for human connection?

Clarity

- Does the new hire know what success looks like?
- Are expectations and timelines clear?
- Are questions answered quickly?

Experience

- Does the process feel organized and intentional?
- Are there unnecessary delays or confusing steps?
- Would your executives be proud to experience this process themselves?



COMMON PRE-BOARDING MISTAKES

Organizations often unintentionally create friction by:

- focusing only on paperwork and compliance
- delaying communication after offer acceptance
- leaving onboarding entirely to HR
- failing to involve managers early
- overwhelming new hires with information on day one
- treating all onboarding experiences the same, regardless of role

QUICK WINS TO IMPLEMENT THIS MONTH

1. Add Human Connection

Include videos, team introductions, or personal welcome messages.

2. Involve Managers Earlier

Require manager outreach before the start date.

3. Create a First-Week Roadmap

Reduce uncertainty by clearly outlining what happens during the first week.

4. Build Belonging Intentionally

Help new hires feel part of the organization before they officially begin.

REFLECTION QUESTIONS

1. What emotions does our pre-boarding experience create?
2. Where are new hires most likely to feel uncertainty?
3. How consistent is the experience across departments?
4. What would make our onboarding experience memorable?
5. Are we designing onboarding for efficiency—or engagement?

NEED HELP IMPROVING NEW HIRE RETENTION?

Meritage Talent helps organizations design onboarding and early success strategies that improve engagement, accelerate productivity, and strengthen retention.

[Book a free one-hour consultation](#) to discuss your onboarding challenges and opportunities.

