

Pre-Boarding Preparation Checklist

☐ **Equipment & Technology Setup (Complete 1 Week Before Start)**

- ☐ **Laptop order:** Purchase a laptop with the required software installed.
- ☐ **Phone setup:** Purchase the phone and configure the company number.
- ☐ **Office supplies:** Order notebooks, pens, and business cards.
- ☐ **Workspace preparation:** Set up desk space or coordinate remote work setup.
- ☐ **Equipment testing:** Test all equipment and connectivity.
- ☐ **IT support contacts:** Create an IT support contact list for the new hire.

☐ **System Access & Accounts (Complete 3-5 Days Before)**

- ☐ **Email account:** Create a company email account with a proper naming convention.
- ☐ **CRM access:** Set up a CRM user account with appropriate permissions.
- ☐ **Sales tools:** Configure access to sales tools (email platforms, demo software).
- ☐ **Calendar setup:** Establish calendar and meeting software access.
- ☐ **Communication tools:** Set up communication tools (Slack, Teams, phone system).
- ☐ **Training accounts:** Create training environment accounts for practice.

☐ **Team Preparation & Communication**

- ☐ **Mentor assignment:** Assign a mentor and brief them on responsibilities.
- ☐ **Team notification:** Notify the team of the new hire's start date and role.
- ☐ **Welcome meeting:** Schedule a welcome lunch or team introduction meeting.
- ☐ **Contact directory:** Prepare team contact directory with photos and roles.
- ☐ **Manager calendar:** Block manager calendar for first-week training sessions.
- ☐ **Room reservations:** Reserve conference rooms or training spaces.

☐ **Welcome Package & Materials**

- ☐ **Company items:** Prepare company items (shirt, mug, branded materials).
- ☐ **Schedule creation:** Create a first-week schedule with meeting details.
- ☐ **Team directory:** Include team directory and organizational chart.
- ☐ **Product materials:** Add product overview materials and demo videos.
- ☐ **Access information:** Provide parking information or office access cards.
- ☐ **Welcome note:** Write a personalized welcome note from the manager.

☐ **Documentation & Planning**

- ☐ **Individual plan:** Create an individual onboarding plan with specific goals.
 - ☐ **Job expectations:** Prepare job description and performance expectations.
 - ☐ **Success stories:** Gather relevant case studies and customer success stories.
 - ☐ **Training organization:** Organize training materials by week and topic.
 - ☐ **Progress tracking:** Set up a progress tracking system for milestones.
 - ☐ **Review scheduling:** Schedule 30-60-90 day review meetings.
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