

CHECKLIST

Crossboarding Checklist

for internal promotions and lateral movements



Introduction

What is crossboarding?

In a nutshell, crossboarding is a two step process:

Step 1 involves identifying existing employees within your organization who may be suitable for an open vacancy.

Step 2 is walking that employee through an integration journey, similar to onboarding, that gives them the best chance of success in their new role.

Anytime an existing employee is moving somewhere else within your organization – whether that's up (a promotion) or sideways (a new department) – a solid crossboarding process can be the difference between thriving and spiralling.

But why do we crossboard?





Why crossboarding?

Good for the bottom line

Bringing a new employee on board costs an employer around €4000 and 24 days in acquisition costs. By switching your focus to internal cross boarding over external hiring, you can empower employees to transition their skillset from one role (or department) to another, saving you money and safeguarding organizational knowledge in the process.

Good for productivity

It can take a recruit up to 12 months to be fully productive in a fresh role. By employing a cross-boarding-first approach to filling vacant roles, you can lean on your mover's existing company knowledge and cut that productivity curve in half (at least).

Good for long-term retention

According to a 2020 CareerAddict study, 82% of employees would consider quitting their jobs if there is a lack of progression. By developing a strong crossboarding strategy that allows for flexible growth, you can ensure your people stick with you for the long haul.

To help you establish a 10/10 crossboarding process of your own, we've put together this 3-part checklist that outlines how to identify crossboarding candidates, explores crossboarding activities on a general level, and helps you personalize the process for the 2 main types of crossboarding – promotions and lateral movements (changing from one field to another, for example moving from finance into marketing).

Let's crossboard!

IDENTIFY crossboarding candidates



Step 1 of your crossboarding process involves setting up an internal framework that allows HR to identify potential candidates within the organization who could be a good fit for one of your open vacancies.

Your biggest challenge here is creating a mindset shift for employees. You need to make it clear that internal hiring is a priority for your business and not a carrot on a stick. That means building strong lines of communication, prioritizing internal development, and creating opportunities for employees to move beyond their current station.

Here are 4 activities you can use to effectively identify employees who are a good fit for crossboarding:

- ☐ **Communicate in-house first**
When you have a new vacancy, send the role description to your Managers first and see if they have anyone they would like to put forward. Then send the vacancy to the organization at large and open the floor to all employees. Treating this process like a marketing campaign, where you perhaps print posters and design a colourful, eye-catching email, will help generate internal buzz.
- ☐ **Set up a quarterly (optional) skills and growth survey**
A digital skills & growth survey that asks existing employees where they would like to expand their skill set and how they see themselves growing within your organization, will give HR a hit list they can cross reference when new vacancies come up.
- ☐ **Run regular open training sessions**
If you know you have a skills gap within your organization (or anticipate one in the future) consider running training sessions open to any employee looking to expand their skill set. This will allow HR to identify employees with an aptitude for the work and prep potential candidates for a future promotion or lateral movement.
- ☐ **Ask employees who THEY would recommend**
Your employees will likely know who would be a good fit for a promotion or career shift, so use that knowledge! Set up an inbox where employees can recommend their colleagues for roles within the organization – you can even incentivize this by offering a 'referral bonus' if their recommendation ends up being picked for the role.

GENERAL crossboarding



Regardless if your employee is making an internal career jump or shifting skills entirely, some crossboarding activities are universally important.

When you're integrating a mover into their new role, you need to consider the impact that the move will have on your mover, your mover's manager, and HR – as each stakeholder has a slightly different (but equally important role) to play in the process.

If you're familiar with employee onboarding, you'll recognise a lot of these tasks!

EMPLOYEE TASKS



Prepare a 'how to be me' document

Have your mover create a handover document for their replacement.



Get curious

Ask your mover to write a list of questions they have about their new role for discussion with their manager on day 1.



Share the news far and wide

Invite your mover to create a LinkedIn post to share their new role with the world. Extra points if you help them with a [best-practice template](#)!



Introduce yourself

If your mover is comfortable with it, ask them to record a short video for their team showing their excitement for their new role.

MANAGER TASKS



Put together a 1-month crossboarding roadmap

Include at least 2 activities per week that help your mover adjust to their role.



Plan a 'welcome to your new role' celebration

Dinner, lunch, drinks, morning tea – whatever you think will make for a nice welcome.



Check in weekly with your mover

Just because they know the company, doesn't mean they won't appreciate the support!



Book a goal-setting session with your mover

Figure out together what your mover wants to achieve in their new position.

HR TASKS



Assign a crossboarding buddy

Every employee transition moment is more manageable with a buddy by your side.



Connect your mover with a relevant mentor

This will help your crossboarder settle more quickly into their new role.



Walk your mover through the benefits package and any other key company documentation

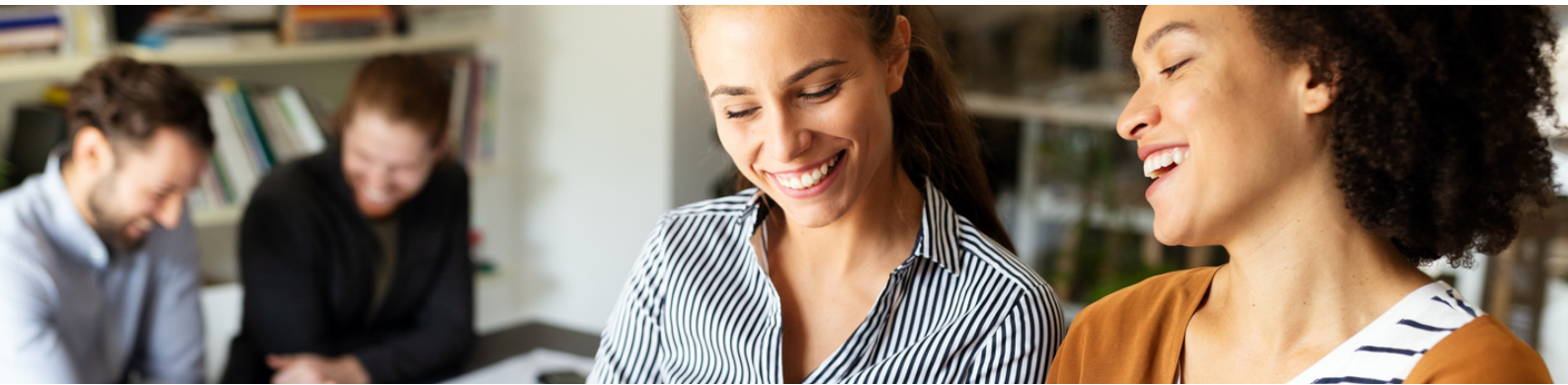
This is a great time for a refresher and to explain any new benefits.



Organize a crossboarding feedback session

Make your next process even better by gathering valuable feedback.

PERSONALIZED crossboarding



General support is great – but different types of crossboardees have slightly different needs.

For example, someone who is going through a crossboarding journey for a promotion, likely already knows their team well, so won't need support around integrating into a new social setting. Someone making a lateral move, however, will have a new team and new ways of working that they will need help getting to grips with.

To help you get specific, we've outlined some specific tasks for each of the two most common crossboarding scenarios:

FOR PROMOTIONS



Create a 'manager best practices' guide

If your mover is becoming a manager for the first time, a document like this is a big help.



Build seniority-matched connections

Connect your mover with others of similar seniority they can bounce ideas off.



Write a personalized welcome

A short letter explaining why you are excited to have them in the role can really boost your mover's confidence from day 1.



Brief them on their team

If your mover is moving into a managerial position, be sure to brief them on their new team including any recent promotions, conflicts, hires, or separations.

FOR LATERAL MOVES



Make connecting easy

Provide a cheat-sheet of contact information for all team members and need-to-know personnel relevant to your mover's new role.



Break the ice

Organize an icebreaker session with your mover and their new team so they can get to know each other a little better.



Set aside time for learning

Switching professions is a big change, so be sure to schedule plenty of time for your mover to get acquainted with their new landscape.



Strengthen through team building

Get your team together for a team building session (or two) to make your mover feel more connected.

Are you ready to pump up your crossboarding efforts?

Talentech can help!

Our integrated, future-friendly software can manage all your employee transitions from preboarding, to onboarding, crossboarding and beyond.

Book your no-strings-attached demo today!

BOOK A DEMO

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