



# Manager Onboarding Checklist

Human Resources

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ID: SE-022

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|-------------------|------------------------------------|
| <b>Employee:</b>  | <b>Manager:</b>                    |
| <b>Hire Date:</b> | <b>Desk Location:</b>              |
| <b>Position:</b>  | <b>Key FOB Hours:</b> 24/7 Limited |

## Pre-Boarding

Notify HR of new hire

Write out expectations and responsibilities of new position, including an assimilation guide

Fill out IT checklist and send to IT to have completed

Write up welcome email for employee

## Week 2-4

Send out introduction email to the entire company

Complete new hire's formal development plan - use template

Cover their assimilation guide in detail

Set initial expectations of what you think his/her business goals should be

Review timekeeping and other administrative details

Explain the company's personal development philosophy and his/her role in creating an individual plan

Facilities tour

Set a timeline for when the development plan should be completed

Introduce to immediate team members and other associates

Establish some quick wins that can be accomplished in the next 30 days

Schedule time for a wrap-up at the end of the day

Organizational chart

Set up a lunch with the new hire and team or just Manager

Provide a broad overview of all functions

Assign a mentor

### Formally check on progress

What is going well in his/her job?

How are things going with his/her Mentor?

Where is employee running into roadblocks? (What can you do to remove them?)

Highlights – what can we leverage more to maintain his/her productivity and success?

What did employee find helpful in their onboarding over the last month?

Improvement areas – quick wins vs. longer term opportunities?

What has employee learned over the last 30 days?

## Day 60

What's happened over the last 30 days?

Highlights – what can you leverage more to maintain his/her

Has anything changed – for the better? Or worse? (If so, how can you help correct it?)

Improvement areas – quick wins vs. longer term opportunities?

What sort of observations about the organization does s/he have?

## Day 90

Does s/he feel s/he has everything needed to be successful?

How is s/he progressing toward his/her development plan?

What has been his/her biggest "aha moment" over the last 90 days?

What's going well? What isn't?