

Onboarding Checklists

Manager

Before Day One

- ☐ Provide Leadership Starter Pack (role charter, expectations, acronyms, culture overview)
- ☐ Schedule team introductions
- ☐ Set up system access, tools, and workspace
- ☐ Send welcome message from their supervisor
- ☐ Share organizational chart and stakeholder map

First Week

- ☐ Host warm orientation with culture champion or supervisor
- ☐ Conduct team introductions (formal + casual)
- ☐ Review communication norms, meeting cadence, and expectations
- ☐ Begin one-on-one schedule with each direct report
- ☐ Provide Manager Toolkit (templates, feedback guides, meeting agendas)

First 30 Days

- ☐ Shadow peer managers and observe team workflows
- ☐ Begin leadership training (feedback, coaching, documentation basics)
- ☐ Set first "small win" project
- ☐ Meet cross-functional partners
- ☐ Complete 30-day check-in

30-90 Days

- ☐ Confirm all property returned and accounts closed.
- ☐ Provide employee with final documents (e.g., tax forms, references if applicable).
- ☐ Record checklist completion with HR sign-off.

Date: _____

Name: _____


Department: _____

Last Working Day: _____

Six Months

- ☐ Lead department initiatives or improvement projects
- ☐ Drive deeper career conversations with team
- ☐ Attend advanced leadership development
- ☐ Complete mid-year performance calibration and development plan

One Year

- ☐ Host one-year review and forward-looking planning session
 - ☐ Review career pathing and compensation outlook
 - ☐ Celebrate the milestone meaningfully
 - ☐ Refresh leadership goals for Year 2
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Onboarding Checklists

Promoted Manager

Identity & Transition

- ☐ Hold meeting to discuss mindset shift (peer → leader)
- ☐ Establish new communication boundaries and expectations
- ☐ Host formal transition meeting with former peers

Date: _____

Name: _____

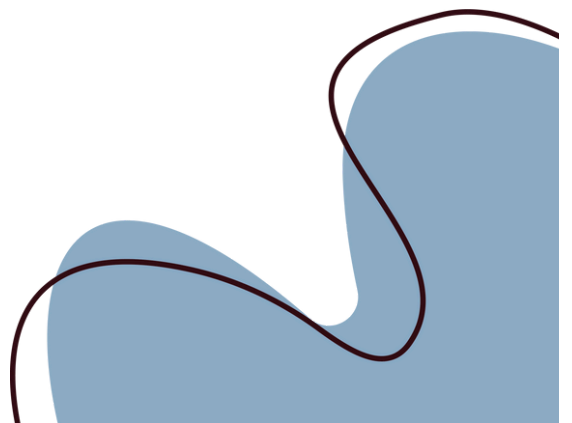
Department: _____

Last Working Day: _____

Support Structure

- ☐ Assign mentor or internal leadership coach
- ☐ Provide “Managing Former Peers” playbook or scripts
- ☐ Share recommended one-on-one agenda formats

First 90 Days

- ☐ Attend targeted leadership training
 - ☐ Complete 30/60/90-day check-ins
 - ☐ Review role clarity and new responsibilities
 - ☐ Conduct skip-level meeting
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Onboarding Checklists

Executive

Before Day One

- ☐ Deliver Executive Starter Pack (strategy docs, org history, leadership expectations)
- ☐ Schedule introduction meetings with key executives
- ☐ Provide overview of decision-making structure & authority
- ☐ Assign external or internal executive coach

First 60 Days

- ☐ Conduct listening tour (team, peers, customers, skip-levels)
- ☐ Review historical initiatives, cultural context, and past wins/losses
- ☐ Host biweekly one-on-ones with executive peers
- ☐ Draft one-year strategic plan

60-Day Alignment

- ☐ Review draft one-year plan with CEO/Board/Top Leader
- ☐ Clarify what to prioritize—and what NOT to prioritize
- ☐ Identify departmental talent and capability gaps

Six Months

- ☐ Conduct second feedback cycle with peers
- ☐ Meet skip-level groups at least bimonthly
- ☐ Conduct department-wide “all team” meeting
- ☐ Identify high-potential talent across organization

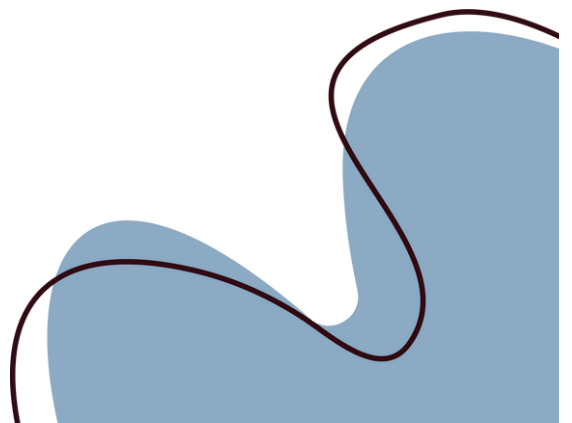
Date: _____

Name: _____

Department: _____

Last Working Day: _____

One Year

- ☐ Lead strategic review for year one
 - ☐ Integrate long-term structure, goals, and capabilities
 - ☐ Recalibrate communication rhythm and leadership visibility
 - ☐ Host annual department-wide meeting
 - ☐ Renew coaching and development plan for Year 2
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Onboarding Plan Template

I. Pre-Start Preparation

Deliverables to Send:

- ☐ Role Charter & Leadership Expectations
Organizational Chart & Stakeholder Map
- ☐ Culture Guide & Acronym List
- ☐ First Week Schedule
- ☐ Team Introduction Email Draft
- ☐ Tools, Access & Equipment Setup

II. First Week Plan

Objectives: Build connection, establish clarity, begin orientation

To Complete:

- ☐ Day One Welcome & Orientation
- ☐ Team Introductions (Formal + Casual)
- ☐ Review Communication Norms & Meeting Rhythms
- ☐ One-on-One Schedule Setup
- ☐ Manager/Executive Toolkit Delivered
- ☐ Intro Meetings with Key Partners (List below)
- ☐ Partner Meetings:

III. First 30 Days

Objectives: Learn, observe, establish trust, accomplish early wins

To Complete:

- ☐ 30-Day Check-In
- ☐ Introductory One-on-Ones Completed
- ☐ Shadowing + Observational Learning
- ☐ First Win Project Assigned
- ☐ Training (Feedback, Coaching, Systems Basics)
- ☐ Early Team/Culture Assessment

Start Date _____

Name _____

Role _____

Supervisor _____

HR/People Partner _____

IV. 60-Day Plan

Objectives: Begin ownership, refine direction, align w/leadership

To Complete:

- ☐ 60-Day Review with Supervisor
- ☐ Draft 1-Year Plan (Executives Only)
- ☐ Stakeholder Feedback Review
- ☐ Expand Cross-Functional Collaboration
- ☐ Begin Coaching/Mentoring Plan

V. 90-Day Plan

Objectives: Demonstrate leadership capability, align on performance, reset expectations

To Complete:

- ☐ 90-Day Review
- ☐ Update Goals for Remainder of Year
- ☐ Team Development Plan Started
- ☐ Formal Feedback Session Scheduled
- ☐ Skip-Level Meeting Completed

Onboarding Plan Template

VI. Six-Month Plan

Objectives: Demonstrate leadership capability, align on performance, reset expectations

To Complete:

- ☐ Lead Departmental Initiative
- ☐ Mid-Year Talent + Performance Review
- ☐ Career Development Conversations
- ☐ Advanced Leadership Development Program
- ☐ Department "All Team" Meeting (Executives)

VII. One-Year Plan

Objectives: Celebrate, Reflect, and define long-term leadership impact

To Complete:

- ☐ One-Year Review + Future Planning
- ☐ Review Compensation + Career Trajectory
- ☐ Recognize Milestone Publicly
- ☐ Refresh Leadership Goals for Year 2
- ☐ Evaluate Coaching/Mentorship Continuation