

Managers

Onboarding Checklist



Welcome!



New Starter Checklist

Set up for success

☐	Review job role and responsibilities
☐	Discuss management style
☐	Review performance goals
☐	Schedule meetings with key team members
☐	Provide an overview of common programs & useful websites
☐	Explain desk setup and how to request additional resources
☐	Schedule weekly 1:1s
☐	Add new starter to team chat

Create a warm welcome

☐	Prepare a week one agenda
☐	Make lunch plans with the team
☐	Have team sign a welcome card
☐	Introduce employee to co-workers
☐	Take a walking meeting outside the office to learn more about the employee's life outside of work

Show investment

☐	Identify the training and development activities to be completed within their first 6 months
☐	Suggest LinkedIn Learning to do
☐	Identify and set measurable career goals for the next month
☐	Book 3 and 6 month reviews

First Quarter Tools

The first 90 days are a critical time in establishing a new employee's success. This is also the point where you as the manager assume more of the onboarding responsibility. It's essential that you help them train, and manage new hires effectively, while making the experience personal and transformative.

To do so, this document provides you with a list of check-in questions to ask your new hire. This conversation should take place over weekly 1:1s or casual coffee chats. It will create an open working relationship, help build trust and identify how you can better assist your new hire transition to their new role, team and company.

As the manager, you should help the new hire create some measurable goals. Use the following template to set expectations, clearly define what success looks like, and keep new hires highly engaged. Include a combination of quick-wins and long-term goals that will give new employees a sense of accomplishment and lasting impact.

Check-In Questions

☐	Tell me how you are feeling in your new job
☐	What are you enjoying most about your role?
☐	Is the job/team/company what you expected?
☐	Has anything surprised you? If so, what?
☐	Has training been helpful? What would you add or change?
☐	Do you have all the tools and resources that you need?
☐	Do you feel like you have gotten to know your coworkers well?
☐	Do you feel out of the loop about anything?
☐	What should we provide to new employees that we have missed?
☐	What is working/what is not working?
☐	Is anything about your role, the team or company still unclear?
☐	How can I be a better manager to you?
☐	As your manager, what can I do to make your transition easier?



Goal Setting Guide

OBJECTIVES	KEY RESULTS		LOOKBACK
What	Win	When	Status / Comments

Goal #1

What do you want to achieve?	What does success look like?	When do you want to achieve it?	Review what was achieved

Goal #2

What do you want to achieve?	What does success look like?	When do you want to achieve it?	Review what was achieved

Personal Development Goal

What do you want to achieve?	What does success look like?	When do you want to achieve it?	Review what was achieved



**“Setting goals is the
first step in turning
the invisible into
the visible.”**

- Tony Robbins

