
Onboarding New Managers Checklist

- **Highlight your company's management culture.** Do this by sharing:
 - A video that showcases your values and ways of working
 - A book that echoes your management style
 - A message from your leadership that conveys your company's mission
- **Explain what's expected of managers at the end of each month, quarter and year.** This will help new leaders understand short-term and long-term goals and focus on results. Include company-wide, department and individual goals and make sure to cover how you keep track of progress (for example, using reports or a task management tool.)
- **Brief managers on individual team members.** Describe the department's structure (for example, their direct reports and who their supervisor reports to) and where their department fits within the entire organization. Also, mention any recent:
 - Promotions
 - Client Engagements
 - Conflicts
 - Hires
 - Separations
- **Schedule one-on-one meetings with relevant coworkers.** Make sure new managers meet with people they'll work closely with, including:
 - Their direct supervisor
 - Their team members
 - Other managers
- **Enroll managers in regular management trainings.** Leadership abilities are difficult to cultivate, particularly for those who are new to senior positions. Schedule trainings on:
 - **Motivation:** Managers need to inspire team members to remain productive, despite difficulties.
 - **Conflict management:** Disagreements could arise within a team and a good manager should not let issues escalate.
 - **Time management:** Team leaders manage deadlines and delegate tasks, so they need to know how to prioritize work and complete tasks on time.
 - **Team management:** Managers should learn how to coach team members on-the-job, track performance and plan career paths.
- **Give an overview of your employee performance review process.** Describe:
 - The review process you follow (for example, 360° evaluation, 1:1 meetings)

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- The software you use
 - The frequency of performance reviews (for example, quarterly or annual)
 - The criteria you use to evaluate performances
 - **Describe your most important company policies and how to monitor whether team members follow them.** Note that managers should have an in-depth understanding of how your company operates to set a good example for their team. Policies you should highlight are:
 - Leave policies (including paid time off and sick days)
 - Security policy
 - Remote work policy
 - Confidentiality policy
 - **Describe how your company recognizes and rewards employees:** Cover:
 - Monetary bonuses (e.g. based on performance)
 - Non-monetary rewards (e.g. additional paid days off after a big project)
 - Ways to acknowledge success (e.g. a “thank you” on your company messaging app)
 - **Explain your company’s recruiting process.** Mention:
 - Your hiring plan review process
 - Your internal mobility policy
 - Your recruitment policy
 - Any recruiting software you’re using
 - **Explain what their team budget includes.** Team leaders are usually responsible for budgets that can be used on:
 - Trainings
 - Resources (e.g. books)
 - Subscriptions (e.g. online courses)
 - Software and hardware
 - Team-building activities
 - **Schedule periodical meetings between new managers and your HR department.** Make sure they are fully settled in their new role and allow them to address any questions they may have during their first 30, 60 and 90 days.