



CHECKLIST

Onboarding Checklist for Managers

The manager is responsible for communicating expectations to the new employee. It's helpful to provide a written plan detailing objectives and related tasks. Discussion should ensure the employee understands how their responsibilities support the mission and vision of the organization. Doing so provides the employee an avenue to gain clarity as well as address any questions or concerns they might have about their responsibilities.

- ▶ At the end of day one, the manager should have a brief informal check-in with the new employee. This simple act demonstrates they care, they want to hear from the individual, and helps to set the stage for future communications.
- ▶ After one week on the job, it's beneficial to have another check-in. This is the manager's opportunity to assess what the new hire has learned, whether they're starting to feel comfortable in their new role, and whether the employee needs any additional assistance.
- ▶ At the 30-Day benchmark, the new hire should be fully acclimated and acquainted with their job responsibilities. Discussion should focus on accomplishment of short-term goals and laying the groundwork for longer-term objectives. It's also a good time to assess the individual's satisfaction.
- ▶ At the 90-Day benchmark, the new hire should have a thorough understanding of what needs to be done and be well on their way to achieving results. Providing the individual feedback on their contributions, strengths and areas for improvement goes a long way in retaining the employee.
- ▶ At the 120-Day benchmark, it's helpful for the manager to conduct a full review of the employee's goals and progress. Revisiting the feedback shared during the 90-day discussion will help the manager assess whether the employee is on track and making progress in the areas identified.
- ▶ At the 1-year anniversary, the manager should conduct a full performance evaluation. Similar to the three and six-month reviews, two-way feedback should focus on the individual's achievements, strengths and areas for improvement. It's also the time to outline expectations and goals for the coming year.

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