



Team Onboarding Checklist

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Introduction: The Team Onboarding Checklist

The Team Onboarding Checklist is a practical guide to ensure the new hire (NH) becomes connected and successful within their group or team. It is based on research with managers and new hires. The checklist helps focus managers on what to plan, pay attention to and do at different stages in the NH's onboarding experience. This checklist and its activities can be integrated into other onboarding requirements in a large company. It can help small or new companies think about developing a team onboarding program.

The manager is the hero of onboarding.

The manager must execute and oversee all team onboarding planning for NHs. Few managers are trained in how to onboard or how to manage the social, emotional, and professional growth needs of NHs. Busy managers, those expected to work as well as manage, those onboarding multiple NHs at once, or those with many reports may feel they don't have the time to plan and closely guide NHs. Let this checklist help you define what to do.

Structure and Use of the Checklist

Onboarding occurs over four *key time segments* found to be important for NHs. Planning for each time segment breaks down the activities for managers.



- Before start date (after accepting the offer)
- First days (1-3)
- First weeks
- Launch (8-16 weeks, depending on the new hire)

Within each time frame we list activities to help managers plan. These activities are broken into eight building blocks. Four building blocks support planning for

Connection, helping the NH build relationships with people that matter for success and a feeling of belonging.

| Connection Building Blocks | |
|----------------------------|--|
| Manager | Responsible for planning and overseeing the onboarding experience; the first line of connection critical to success. particularly early career |
| Buddies | The set of people who will partner and guide the NH in doing the work (Work Buddy), getting tools and tech working (IT Buddy), getting experienced perspective and feedback (Experienced Buddy) and understanding the company and being an employee (Company Buddy). |
| Team | The people who will work directly with the new hire within and outside of the formal team; the source of value and knowledge |
| Network | First the NH's social connections, then other collaborators, influencers and stakeholders within the company; critical for career development |

Four building blocks support planning for NH *Success* at work, the information, tools, and perspective needed to become part of the team, company, and get the work done with quality.

| Success Building Blocks | |
|------------------------------|---|
| Tools and Information | Access to all tools relevant to NH job role, typical to the team, domain information, past project examples – with helpers to find & interpret how and when to use it |
| Team Culture | The team’s way of working and socializing, rules of engagements, habits and expectations beyond corporate policy |
| Job Role | Clear communication of the value of the role. Clear role expectations, responsibilities, practices, and typical collaborators. |
| Project | The project or work the NH is assigned to with clear expectations of deliverables, timeframe, and success criteria. |

Checklist Use: Once you have a NH to onboard, review the checklist and plan at least through First Weeks. Plan Launch by week three. Be sure to create the [Introductory Documents](#) or plan how to share the content described. Adjust your plan as needed for the NH. Keep notes so you can use this document as a reference for the next NH. Use links to support information in the [Appendix](#) to support your planning. If you have questions or want to share additional issues while using the Checklist or Planning Guide please contact us: <https://www.witops.org/contact/>

Who is the New Hire?

The experience and situation of the NH naturally affects your planning. Throughout the checklist, we reference issues particular to levels of experience. Consider the following:

- **Early Career:** New graduate, first job, some experience (1-4)
 - Need a quick social group in the team & advice from home
 - Don’t expect the to be comfortable reaching out to others – set up 1-1’s for them
- **Hired intern:** They don’t really know the organization or group
 - Just because they were there a year ago, people and procedures change.
 - They are still early career—treat them that way
- **Experienced:** 6-10+ years in this industry, in the same job role, worked with similar products
 - Give them a quick win, stretch goals, and expect fast contribution
- **Transfer:** They might know the company, but they don’t know this group or team
- **New Job Role in your group:** Invite them to co-create the role and work

Also think about [Who is Remote?](#) This will change your plan.

Before: Connection

| Manager | | Your Plan |
|-------------------------------------|---|--|
| Communicate your excitement | Reach out to NH in a face-to-face meeting, email, or by phone. Communicate that you and everyone is excited they are coming. Give them your contact information. | The HR/Manager Gap |
| Give an overview of what to expect | Provide a schedule and high-level overview of the first few days' activities. Include a brief introduction to their first project and key people they'll meet. | |
| Answer questions | Answer questions about paperwork, relocation, vacation or any other issue the NH raises. Provide help. | |
| Get a personal statement | Ask the NH to write a short paragraph with a bio, key interests, and a picture to share with others. | |
| Buddies | | Your Plan |
| Pick the Work Buddy | Pick a Work Buddy who does the same work, is co-located, and has a few years' more experience than the NH. Communicate your expectations and how you will monitor their success. | Learn about buddies |
| Identify other support buddies | Identify a set of buddies to help the NH increase skill (Experienced Buddy), introduce the organization and corporate websites (Company Buddy), and a technical helper (IT Buddy). These are in your team or group. | |
| Ask buddies to reach out | Ask all buddies to reach out by email, LinkedIn, Slack, etc. to communicate their excitement, explain how they can help, and share something personal. | |
| Team | | Your Plan |
| Give the team an overview of the NH | Share NH's resume, skills, portfolio, LinkedIn, personal email to get the team excited. If you asked NH for a personal statement, share this. | |
| Ask the team to reach out Before | NH key co-workers reach out through email, LinkedIn, or an acceptable channel to communicate excitement and any common interest or experience. | |
| Network | | Your Plan |
| Identify possible friends at work | Help NH create a social community among the people they will work with. Identify others in their same age cohort, especially with the same job. | Who is in the new hire's social community? |
| Share relevant interest groups | In your first contacts, let NH know about any company or local clubs or Slack groups they would be interested in based on their personal statement. Include relevant centers of excellence for their role. | |



Before: Success

| Tools & Info | | Your Plan |
|---|--|---|
| Be ready | Ensure that <i>all</i> computer equipment, phone, office equipment, etc. the NH will need is ordered to be ready for Day 1. Find a desk for the NH to work near the team. | Prepare introductory documents. |
| Give NH choices for equipment and healthcare before they come | Let NH fill out forms or at least learn options for healthcare, benefits, etc. before official start date. Give them time to choose and discuss. Use a Hub, not email and fax to sign and select. | |
| Give NH a jump-start to understand company and job | Send links, marketing descriptions, articles, process descriptions or other non-proprietary information about the company, product, or domain they will be working in. This is not required work; it's context information. | |
| Team Culture | | Your Plan |
| Share real culture of the team beyond corporate policy | Real work practices: typical hours people are in the office vs. work from home, usual dress, group lunches, fun stuff... | |
| | Real home/work balance: work at home days, vacation, sick kids, overall home/personal values of the group. | |
| Job Role | | Your Plan |
| Express excitement & value of NH role | Provide a specific description of their role and your expectations (even if you discussed it in the interview). If the job is a new role, talk about how the job will be designed together. | |
| Set up meetings with key work collaborators | Set up 1-1's over the 4-6 weeks with key work partners in your team and collaborating teams. Include people who have done the NH's job role. Don't ask early-career NHs to set up the meetings themselves. Doing the set-up for any NH is valued. | |
| Project | | Your Plan |
| Get NH excited about their first project | Share a high-level description of the first project including the schedule, who NH will partner with (Work Buddy), and how the project will help them learn. | |
| Plan NH projects for 90 days | Plan out NH projects with co-workers for the first 3 months. Give NH a quick success. 30-60-90 day plans work. Be ready to share the plan in the first week. | |



First Days: Connection

| Manager | | Your Plan |
|--|--|--|
| Day 1: Greet and spend time together | Greet, express excitement, and explain first day's schedule. Even if Day 1 is corporate onboarding, spend time with NH. | Block your calendar Busy managers |
| First Days: Introduce the business and overall work area | Give a manager's high-level lens on the business and the work. Explain your style as a manager. Share best way to contact you. | |
| | Walk through NH's initial work plan. Start reviewing both introductory documents to the job. Invite questions. | |
| Buddies | | Your Plan |
| Work Buddy introduces the job | NH meets with Work Buddy, who preferably sits nearby. Buddy gives overview of the team, role, and work. | |
| Connect NH to Support Buddies | Schedule 1-1 with Support Buddies who explain their role and start to get to know NH. Be sure IT Buddy gets systems up and running. | |
| Buddies answer questions | All buddies invite NH to ask questions and come to them for all issues and questions. | |
| Team | | Your Plan |
| Team welcomes NH with fun event | Hold a fun welcome event for the NH. Emphasize NH's strengths and the value of the role. | |
| | Team shares brief funny bios at lunch, on Slack, or another channel to welcome and connect with the NH. | |
| 1-1 discussion with key co-workers | Key 1-1's with team members with whom NH will collaborate or who might be friends. Go beyond simple drop-in introductions by walking the hall. | |
| Network | | Your Plan |
| Help NH understand goals of senior managers | Give an overview of key stakeholders, including their role, expectations, and goals for the year. Explain what makes senior managers successful. | |
| | Set up short 1-1's with 1-3 key stakeholders. Stakeholders greet the NH and share their vision. Don't expect early-career NH to ask questions. | |
| Connect NH to potential work friends | Connect NH to people in and outside of your group that NH will work with who might become part of their new social group. | |



First Days: Success

| Tools & Info | | Your Plan |
|---|--|---|
| Day 1: Ensure NH can access all tools and information | All computers, phone, info access working in 24 hours. | Team Document |
| | Make sure NH has access to tools, team Wiki, and any domain information for their project. IT Buddy helps. | |
| Review Team/Job links and deck | Start walking NH through the overview slides and links to introduce NH to the work and job role practices. Don't send NH to Wiki, or team portal, to "figure it out". | |
| Team Culture | | Your Plan |
| Help NH learn the team culture and daily work-life activities | Share team/group traditions: Typical dress, meetings, main hours people are in the office, work at home days, group lunches, etc. Walk through introductory team Document. | |
| Share best way to communicate with co-workers | Communication within the team: What tech is best: video, email, Slack, text, dropping in... | |
| | Communication outside of team: Who in the org hierarchy can NH contact and how? Address talking to clients or collaborating team members. | |
| Job Role | | Your Plan |
| Share job role techniques & expectations | Explain how NH's job type fits with other job types they will collaborate with. Start introducing project techniques used by their role on the team, showing examples. | Managing new hire overwhelm |
| | Success: Explain what you, the manager, will be looking for to determine if NH is being successful. | |
| Meet with collaborators in the same job role | Help NH get to know the job by talking to others in their role beyond the Work Buddy. If NH is the only one in that role on the team connect them to people in the company doing the same job. | |
| Project | | Your Plan |
| Start NH on real work with Work Buddy | Start the NH on their first project with the Work Buddy. If the job role is new, co-design the first project. | What are good projects? |
| | Do not ask early-career NHs to work alone; if they can't partner, at least have Work Buddy work on a similar project in parallel. Ensure Work Buddy guides NH. | |
| Share work plan for the first weeks | Walk through your plan for NH's work for first few weeks. Explain how the work will help NH learn the product, work, and processes while doing valued tasks. | |



First Weeks: Connection

| Manager | | Your Plan |
|--|--|--|
| Check in often, beyond 1-1's | Check in often, encourage questions. 1-1 weekly meetings are best in the beginning but not enough. Drop in daily – don't expect NH will come to you. | Monitoring new hire adjustment |
| Pay attention to NH adjustment | Is NH connecting to others socially; getting enough oversight; feeling confident, participating in meetings; struggling with a new living situation, etc. Be sure NH knows you are there to help. Check in with buddies to see how NH is doing and that buddies are providing support. | |
| | | |
| Buddies | | Your Plan |
| Work Buddy guides NH work & gives feedback | Work Buddy walks through example projects, deliverable examples, explains how to work with others. Together they co-plan and execute the first NH project. Give feedback on all NH work so they know if they are meeting expectations. Ensure they understand how to overcome problems. | |
| All buddies are available for questions | All buddies check in, answer questions, and provide business, project, system or organizational context as needed. | |
| Team | | Your Plan |
| Continue 1-1 with all co-workers | Reach out and continue 1-1's until NH connects with all on their team and those they work with. | |
| NH participates in work meetings. Invite their ideas | Let NH observe and then take a clear role in working sessions, meetings, critiques, etc. Encourage NH to express their ideas in the session; draw out quiet NHs. | |
| Network | | Your Plan |
| NH meets influencers to understand their priorities | Continue meetings with key managers/stakeholders so that NH becomes known and understands influencers priorities. | Who are the stakeholders? |
| Co-workers invite NH to interesting events | Recommend communities of practice relevant to professional development: Slack channels, meet-ups... Encourage co-workers to invite NH to events and communities of interest in and out of the company (professional and hobbies). | |



First Weeks: Success

| Tools and Info | | Your Plan |
|--|---|--|
| Check that all tools and information can be accessed | IT Buddy checks in – ensures all tools for NH role and data access are really available. Technical issues typically persist for a while. | |
| Introduce Company Document and key physical places | Company Buddy checks that NH space has what is needed, and they know where key rooms, supplies, and services can be found. | |
| | Company Buddy walks NH through Company Introductory Document giving general employee information. | |
| Team Culture | | Your Plan |
| Align/train NH skills to match your practices | Formally or informally explain/train your group's flavor of techniques (code, UX, Agile, design, security...). | |
| Explain values and appropriate behavior for meetings | Explain values and working expectations: behavior in different meetings, asking for a challenge, perfection and failure, questioning decisions ... | |
| Job Role | | Your Plan |
| Help NH understand their job expectations | New Hire talks to other team members about how they understand NH job role. Have NH shadow others' work to learn and create relationship. | Thinking about job roles |
| | Explain how NH's job role fits into corporate and division mission, goals, culture, and context. | |
| Explain role boundaries and watch for conflict | <p>Role boundaries: Help NH understand what is appropriate or beyond expectations for their job.</p> <ul style="list-style-type: none"> • Senior NHs: discuss how much influence or change they can push for. • Early-career NHs, explain what they should not do because it is not their job, even if asked. | |
| Project | | Your Plan |
| Monitor NH work quality & success | Make sure NH is engaged, learning, and getting a quick success from first projects with Work Buddy. | |
| Share 90-day work plan | Share the work plan and key collaborators for the first 3 months. Help NH know what to expect and will learn. | |
| Give lots of feedback & examples of quality | Show examples of successful work: project plans, code, design, presentations for guidance. Explain you expect failure, correction, and learning – not perfection. | |
| | Be sure NH is getting feedback from all co-workers, project leads, and stakeholders receiving deliverables. Help NH know they are meeting expectations. | |



Launch: Connection

| Manager | | Your Plan |
|--|--|--|
| Determine if NH is launched and give them challenges | Determine if the NH is launched. If so, identify work challenges to take on, areas for stretch-growth and connect NH to influential people in/out of company. If not, continue First Weeks approach until they are. | What is launch? |
| | Continue to provide organizational and project context as needed for their projects. Encourage NH to develop and voice their own perspective. | Giving feedback, advancement and career planning |
| Help NH understand the path to career success | All NHs want to know how they are doing, if they are on target with their work, and how to advance. Explain the process and success criteria. | |
| | Co-create a personal roadmap for NH career success through your observation and discussion appropriate to their level of experience. You are the first-line mentor. | |
| Buddies | | Your Plan |
| Buddies continue as go-to support people | NH plans and executes work and collaborates with multiple others but still uses buddies for questions and advice. | |
| Look for a Career Buddy for NH | Career Buddy: Introduce experienced NH to higher-level people, preferably in their job role, who may provide overall career advice and perspective. Help NH find someone they click with vs. assigning a formal mentor. | |
| Team | | Your Plan |
| Ensure NH fully participates in the team's work | Invite the NH to important meetings and presentations. Be sure quiet or less-experienced NHs are heard. | |
| | Continue 1-1's until NH connects with all those they work with, particularly with close collaborating teams. | |
| Network | | Your Plan |
| Showcase NH success to influencers | Expose and showcase NH to influencers and senior managers. All-hands meetings, notes on NH success, and 1-1 discussions with stakeholders helps. Coach NH on participation. | |
| Help NH meet key influencers | Identify key influencers the NH should get to know as part of career planning. Open doors and help NH navigate these relationships. | |
| Ensure NH connects socially | Check that NH is connected socially in the team, the company, and their community. If not, help them connect. | |

Launch: Success

| Tools & Info | | Your Plan |
|--|--|-----------|
| Ask NH to help others with tools & information access | Ensure NH can get help with tech on their own if needed. | |
| | Ask NH to help others with tools, expand the domain information, and otherwise contribute to the team. | |
| Ensure NH really heard important corporate rules | Does your company have continuous required training for security, proprietary issues, conflict of interest and other “firing offense” situations? If not, revisit the most relevant areas for NH. They likely did not take it in during corporate onboarding. | |
| Team Culture | | |
| Monitor team culture to ensure the team is working with the new people | Is the team working well? Any new person disrupts the team culture; adding or losing people will affect interactions. | |
| | Is the NH a lone woman or member of another underrepresented group? Watch for NH involvement and that NH is treated well and valued. | |
| Job Role | | Your Plan |
| Monitor progress on executing job expectations | Does the NH understand their job role; how to execute it within the team and with collaborators? If so, start giving stretch goals appropriate to their experience. | |
| Coach success for their level of experience | Early-career NH: Give lots of feedback and informal skill training as they grow. Encourage taking on challenges and using new skills independently. Experienced: Let NH challenge, suggest, and otherwise help co-create the practice. Expect leadership and acting confidently. Encourage this if it is not happening. | |
| Project | | Your Plan |
| Ensure NH is happy with the work | Understand how NHs like the work. Is it interesting, challenging, and a skill match? Does NH like the balance of independent and collaborative work? Adjust the work. | |
| Plan increasing challenges | Early-career NH: After first learning project, give NH a medium-sized project. Increase responsibility with each subsequent project. Be sure NH is not working alone or stuck long-term with “chore work” like bug fixing. | |
| | Experienced: Give NH a quick success using their skills. Then give them a challenge/ important project. Expect to start using their skill and perspective right away. | |

Appendix: Team Onboarding Planning Issues

Managers may have questions when using the checklist. Here is information that may help you better support your New Hires. The planning issues are organized by the four *key time segments* found to be important for NHs. Each time segment includes an introduction. You can reference all links below.



- Before start date (after accepting the offer)
- First days (1-3)
- First weeks
- Launch (8-16 weeks, depending on the new hire)

First Days issues

[Block your calendar – Check in a lot](#)

[Onboarding takes time](#) – Busy managers

[Managing new hire overwhelm](#)

[What are good projects?](#)

Before issues

[The HR/Manager Gap](#)

[Who is Remote?](#)

[Who's a good buddy?](#)

[Who is in the new hire's social community?](#)

[Introductory documents to prepare](#)

[Company introductory document](#)

[Team introductory document](#)

Launch issues

[Giving feedback](#)

Advancement and [Career planning](#)

First Weeks issues

[Thinking about job roles](#)

[Who are the stakeholders?](#)

[Monitoring new hire adjustment](#)

Before

Help the NH feel welcome, connect & get a feel for the job after acceptance of the offer.

New Hires want to feel prepared.

- ✓ Connect to their manager and who they will work with
- ✓ Know you are ready for them and excited to have them
- ✓ Understand their role and first project at a high level
- ✓ Know what to expect on their first day and week

As soon as the NH accepts the job you can start them on the path to success. NHs want to feel welcome and connect right away. They want to know what to expect when they get there. They want to be prepared for the first day. Reach out with information and support before the NH comes. Make sure they can contact you.

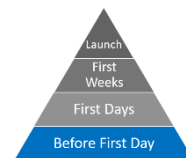
The HR/Manager Gap

Even when the company has roles and services defining what HR or Relocation does, the hand-off from the job offer to the manager isn't smooth. If the NH must relocate, they want to know about the city and where others on the team live. If they have to select equipment or fill out forms, they may call on you for help. Even if you talked about things during the interview, they may ask again. You are the first go-to person for help as soon as the NH accepts the job. Expect it and be available before Day 1.

Who's Remote?

Are you co-located or remote? It is best when the manager is local to the NH is best so it is easy to touch base frequently, answer questions, and provide help. But many managers are remote and sometimes the NH is remote from the team and the best people to guide the work. Any remote situation requires more planning. Here are ideas that have worked which can be applied to the manager relationship:

- Share best way to contact you and encourage reaching out
- Travel to NH the first week and get them started if possible
 - If the NH is remote to you and the team have the NH travel to you.
 - If corporate onboarding is near the core team, travel to meet NH there for the first week.
 - Or if NH is in another country talk by video every day
- Find local go-to people for answers of any kind
 - If the NH is in another country connect them with people in their location or time zone so they can call/meet/video during work
- Set up frequent face-to-face video meetings; establish a habit of conversation and help
- Drop in by phone, text, Slack... to spot check how NH is doing
 - Use group channels for the team to drop in and help also if they are remote to NH
- Ask the NH how the communication plan is working and adjust it.



Who's a Good Buddy? You need more than one.

The buddies you select, formal or informal, will be the NH's first work friends, support group, and go-to people for all questions. Local buddies are the best. These buddies are not overall career mentors. Communicate your expectations to the buddies and how you will track their success in the role. Talk with buddies to get their perspective on how the NH is adjusting, especially if the NH is quiet.

Work Buddy: The guide into success on the job. (local)

- Helps NH understand the job, project, team, team culture, and processes
- Should be in the same age cohort, with the same job role, in your group for 2-3 years
- Potential first friend – age, where they are from, job role, family configuration matters for connection
- Works on the first projects with as a collaborator and guide
- Becomes the long term go-to person for questions and perspective

Experienced Buddy: A more senior experienced person in the same job role

- Answers harder questions and helps with complex work problems encountered by NH
- Provides big picture [context](#) of the work and organization
 - Product, architecture, processes, corporation
- Likes being asked questions and helping new people
- If the manager isn't this buddy, identify a different senior experienced person

IT Buddy: The go-to person to set up systems, tools and to trouble shoot typical issues (local)

- Most groups have a natural go-to technologist, point the NH to that person for help
- Don't merge with Work Buddy if IT Buddy isn't going to partner on the work or become a friend.
- NOT corporate IT, the IT Buddy is someone in your team or local group and knows your work tools

Company Buddy: Person who knows the in's and out's of the company and being an employee.

- Meets NH the first week, checks in & is generally non-threatening so the NH will come ask any question
- Walks the NH through the Introductory [Company Document](#)
- Organizations may create this role at a senior manager level (manager of managers) to offload the work of the onboarding manager

Career Buddy: Senior person in NH job role who can advance NH career (after Launch)

- During Launch introduce NH to higher-level influential people, preferably in NH job role, who may provide overall career advice and perspective.
- Help NH find a mentor they click with through networking vs. assigning a formal mentor
- Even if you could be the Career Buddy it is better to foster multiple influential relationships



Who is in the NH's Social Community?

Every NH, no matter the level of experience, wants to connect with others personally and be known. They look to people on their team and among others they will work with for these connections. This is particularly important when NHs are one of a few in a job type on the team or local. All NHs need to find people to hang out with and share experiences with on a daily basis. Otherwise they will feel disconnected and alone. When thinking buddies or of who to introduce the NH to consider the following:

Common life experience: The most critical of connections for NHs

- Early career: Age and family situation is most important
 - If most co-workers are older with families, early career NHs can't relate to the stories of daily life – and visa versa.
- Shared interests: Hobbies, games, sports...get it from the NH personal statement
- Places they come from, went to school or live now
- Common interest in issues: Women in tech, environment, volunteering...

Professional connection: Forums or associations

- In and outside of the company for connection and career
- Critical if NH is one of a few in a job on the team or locally

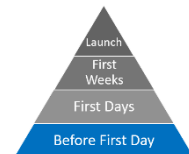
Personal invitations: Being invited & accompanied to events

- NHs in corporate onboarding together won't become a social network
- But if their co-workers invite them to groups and events this will help them connect

Introductory Documents

Best-in-class managers routinely create their own custom onboarding introductory documents. Some managers do this because they were frustrated with the way NHs (or they) were onboarded. These Good Samaritans may also take it upon themselves to meet with every NH, introduce the document, and to be available as a resource. This is one origin of the Company Buddy role.

Managers create two types of documents: 1) [Introductory Company Document](#) containing a set of key links to focus the NH on what matters as an employee in the company and the larger group. 2) [Introductory Team Document](#) including an overview of the product or process, typical tools, and how the work is done by this role. The documents may be slideshows. Once introductory documents are produced other managers pick them up and tailor it for their NH. Consider making them for your group and team to help NH's and simplify onboarding.



Company Introductory Document

Good Samaritans put together these examples of links and information to help NHs navigate work at the corporation. This is not a complete or prescriptive list. Remember corporate internal websites, no matter how well designed, are overwhelming and hard to navigate. This helps the NH get started.

| | Corporate Links | Group Information | Physical Places |
|--|---------------------------------|--|--|
| | Benefits | Charging to a cost center | Health and safety: Exit doors, fire procedure |
| | Vacation, personal & sick leave | Reimbursement procedure | Mail room, printers, equipment |
| | Payroll | Slideshow templates used | Fitness center, meditation room |
| | Contracts | Group info: all-hands slides, staff meeting minutes, budget, new hire plan | Lunchroom, coffee, kitchen... |
| | Travel planning and rules | Roadmap and strategic plan | Mother's room |
| | Travel expense forms | Relevant procedures and processes | |
| | Protocol and behavior | IT help, who to call | |
| | Conflict of interest | Required training | |
| | Environmental issues | Terms used at the company/group | |
| | Legal | | |
| | Product safety | | |



Team Introductory Document: Group mission, team processes, job role techniques

New hires need to be introduced to the team’s work, culture and practices. Before, the NH will benefit from non-proprietary blogs, marketing material, or articles that provide an overview of the company and work. Once the NH starts use the slideshow to walk the NH through the information in chunks over the first few weeks.

Often managers have not articulated team policy and culture. If so, have a discussion with the team and recent NHs to help clarify how the team works. Team culture and practices will change and evolve so before each NH update the document. The document can also work as a guide to you for discussions.

| | Team/Group Links | Team Culture | Role/Project Deck |
|--|--|--|--------------------------------|
| | Team Wiki – structure & key links | Typical Dress (NHs want to fit in) | Tools & how to get access |
| | Roadmap and strategic plans | Work at home days, typical in-office hours, home/work expectations in practice | Processes & Techniques |
| | Group all hands slides | Birthdays and fun celebrations | Deliverable examples |
| | Slide formats & when used | Hang out places and activities | Project plan examples |
| | Expected/Required training | People on the team & how to contact | Report formats |
| | Overview docs: blogs, articles, marketing material | Communication Channels (Slack etc) & video tools used | Critique & feedback processes |
| | Explicit rules of engagement & acceptable behavior standards | Key team meetings; typical start times | Team Manifesto (Agile) |
| | Security & proprietary rules specific to the team | Overall Team Values | Expectations for collaboration |

First Days

Celebrate NH arrival
Help NH learn the workplace
and connect to co-workers

- ✓ Meet with the manager, buddies and key stakeholders
- ✓ Connect to the team socially and in work
- ✓ Make sure all tools and information are available and working
- ✓ Celebrate NH arrival and help all understand NH role/skills
- ✓ Filter and guide through overwhelming information

The first and most important relationship for the NH is the manager. Successful onboarding means creating a real and personal relationship with the NH. Communicate that you are available. Explain the best way to contact you for questions and help. First days' activities determine how welcome and integrated the NH feels.

Block your calendar – Check in a lot

Onboarding takes time. Busy managers must balance other commitments with NH onboarding. But for NH success take the time. Get to know them personally and professionally. Share the best way to contact you. Invite any and all questions. Check in often, beyond 1-1's. Arrange for NH to sit near you or at least central to their Work Buddy and the team. Then everyone can drop in, check in, and collaborate easily.

- *Remote?* Best practice is to fly to be with the NH the first week. Then set up 1-1 video and talk daily.
- *Vacation Day 1?* Assign the Experienced Buddy to stand-in. Set up significant time when you are back

Managing NH overwhelm

Managers worry about overwhelming the NH with too much information, particularly on the first days. The NH must eventually master three types of complex information: corporate onboarding content, business context, and product or work context. The manager's job is to help the NH navigate complex context over the first few months. Consider the following:

Corporate Onboarding: NHs either can't or don't pay attention

- Early Career: Too much is "dumped" on me
 - It's too much: Mission, rules, tech set up, forms, healthcare, "bazaar" of interests...
 - I need guidance from family and friends for first time decisions
 - We recommend dealing with choosing tech, healthcare or other options Before they come
- Experienced: I've heard it before, it's too high-level and waste of time

Business Context: Sharing organizational complexity so NH can navigate it successfully. Step NHs into what they need to know for each project or meeting. Consider which values, practices and concepts to introduce. For example

- Does NH collaborate with multiple groups with different roles and influence?
- Do groups have to reach consensus before anything can move forward?
- How much perspective or business context does the NH need to be successful?



Complex systems and processes: Giving a bigger picture of NH work.

- All NHs want to understand how their work fits in whether code, design, process...
 - Explain the complex system, architecture, design framework or business process
 - Don't expect them to "just go code this piece" without perspective
 - Ensure the NH has a senior go-to person for perspective questions (Experienced Buddy)
- Early Career NH:
 - Answer questions as they are asked to modulate the flow
 - Give the big picture as relevant to each project
- Experienced NH: Take the time to help them understand sooner – they appreciate it

What are good projects?

All NHs want real work immediately so they can have a quick win. They want to partner on projects both to connect with others and to get guidance – this is the job of the Work Buddy. Identify projects that use NHs' existing skills while they are learning your tools, techniques, processes, and the product or area they are working on.

Never send NHs off to gain that understanding by reading manuals, trolling the team Wiki, or learning on their own. Don't just assign "available or must be done work." Consider what is best for the NH so they will be excited that they took the job.

Plan a real project with valued deliverables

- Identify projects using existing skills while learning
- With the Work Buddy, not alone
- Or at least have them work in parallel

Step all NHs into more complexity. After 6-8 weeks all NH need more challenge; it shows you trust and value them

- Early Career need to build knowledge and skill in steps
 - Start with a 1-2-week project with the Work Buddy with lots of feedback first;
 - Next a medium size still with or working side-by-side with the Work Buddy
 - Last a standard project with others or with consultation.
- Experienced NH move quicker with more confidence:
 - Start with a learning project then assign a stretch project

Plan projects for the first 90 days

- 30 – 60 – 90 plans give the NH a sense of where they are going
- Share it in First Weeks – explain your expectations and how you determine success
- If the role is new, work with the NH to define the role, the projects and success criteria.

First Weeks

Get NH up and running fast – with a quick win

- ✓ Get work right away – appropriate to skills and experience
- ✓ Meet with the manager and Work Buddy frequently
- ✓ Know what is considered a successful deliverable
- ✓ Participate in key meetings, critiques, discussions, showing value by listening

The first weeks makes or breaks the NH's feeling of competency and belonging. NHs are looking to see if you think they are worth taking time with; if they are on track; if you think that you made the right decision in hiring them; and if this group is a long-term fit for them. But if NHs don't find people "like them" personally and professionally to connect to locally they may not feel good about the job.

Thinking about job roles

Each NH has a job role: developer, product manager, user researcher, designer, quality manager, compliance expert, trainer, etc. To get the work done successfully, NHs work with others with the same and different job roles. NH may be taking over a role that someone else used to own. NH may be the first person with this job role in the group.

Each role comes with different responsibilities, expectations, decision rights and ability to influence others. The manager is the champion of the NH's job function in the organization. Managers need to ensure that the NH is not being taken advantage of and that they are included in all work, meetings, and decisions appropriate to their role. Consider the following:

- Power and Influence
 - Who has power among collaborators?
 - What can and should the NH influence?
 - How is the influence of the early career NH different from an experienced NH?
- Experience and Respect
 - Early career NH with less experience may feel dismissed or just lack confidence
 - Be sure they are heard and given appropriate work
- Role Boundaries and Role Violation (See below)
 - What work, decisions, meetings,... are part of the NH role responsibilities?
 - Is the NH doing work appropriate to the role? Is the NH included or excluded?
 - Is the NH asked to do work outside their role? Or is someone taking their work?



Role boundaries issues: Every job role has activities that are part of the job and activities that are not. The job role defines what is expected and included. Conflict occurs when someone violates the boundaries of the role. NHs may not be invited to important meetings, included in email chains, or consulted about decisions that rightfully belong to that role. This is particularly problematic when the role is new and someone else used to do the job—so the organization continues to consult them. Sometimes the previous person won't let go of the job.

The manager must help the NH mediate these conflicts and ensure that they are included and given the work challenges that come with the job.

Role boundaries can be violated by asking the NH to do jobs that aren't really in their role. For example, a product manager might ask a new developer to design and code a user interface instead of working with the designers. Or a NH might get good at low-level work, like bug-fixing or icon design, and then become the go-to person for grunt work. In these cases, the manager must ensure that the NH is used appropriately.

Who are the stakeholders?

Managers may not know how to identify the key stakeholders who will impact the NHs' work and eventually their career. Early-career NHs need to know who they will collaborate with outside their team and who will evaluate their work product. Experienced NHs are thinking about key people to help grow their career. Consider the following stakeholders to describe and connect the NH to in the first few months.

Who may influence the NH's work?

- The management chain: Your managers and their manager.
 - What are their goals and how they define success?
- Collaborators: The groups and job roles who collaborate with the NH
 - The NH needs to know how these groups and job roles work together and who they are
 - Eg: Developers and collaborating developers in different groups, product managers, user experience, design, content professionals, architects, process people...
- Managers of collaborators
 - Help NHs need to learn these managers goals and how they define success
- Senior professionals: In the same job role
 - Who influences how their work is conducted in your company?
 - Who NH should meet and impress to advance their career?

What communities of interest should the NH join to advance their career and find friends at work?

- Professional communities formal and informal
- Groups supporting gender, race or other characteristics bringing together people with similar experiences for their job role
- Expected volunteer activities



Monitoring NH adjustment

NHs want to fit in, do good work, be valued for their role and skill, understand how to be successful, connect to colleagues, and make work friends. They must learn the implicit rules of engagement of collaboration and working meetings and participate appropriately and confidently. And you want them to be excited by the job.

The manager is the first-line person to see how well the NH is doing in all areas. You need to coach NHs to greater success. Observe the NH in meetings and interactions. Talk with buddies and co-workers and the NH to see how they are really performing and adjusting to this working environment. Consider the following:

- Are NHs adjusting to a move to a new city, making friends and finding shared activities?
- Are NHs learning how to be an employee in *this* company and group?
- Are NHs exhibiting confidence? Are they seeking challenges, taking on challenges offered or shying away from challenges? Are they asking too many questions, too often?
- Are NH interacting with other with respect? Are they overconfident, steamrolling others, talking too much? Are they participating too little?
- Are NHs sharing their ideas? Are they being heard?
- Do NH seek feedback on their work or are they worried they aren't good enough?

Launch

Is the NH working confidently and collaboratively?

- ✓ Ensure new hires are really integrated into the team.
- ✓ Ensure new hires are performing increasingly challenging work well.
- ✓ Encourage stretch goals and listen to their suggestions for improvement.
- ✓ Start talking about career development.
- ✓ Help new hires get visibility and build a valuable network for their career.

Monitor NH's progress until they seem launched. A launched NH works well on their own and with others. They ask less "how to" and more "what's this" or big-picture questions. They deliver on time with quality and leverage learnings from previous projects. Launched NHs can participate in meetings confidently, talk in 1-1s, in front of a group, and with an influential person. They can voice their ideas. If NH is not launched use the First Weeks guide until they are.

Giving feedback, advancement and career planning

Every job role has a path to more responsibility and promotion. NHs think about success even if they are just out of college. It starts with wanting to be sure they are meeting expectations. Then even after a few months, many want to know the path to promotion. Managers should be clear on what success and growth looks like. Feedback and career roadmaps tailored to the NH provide the specificity that NHs need.

Feedback considerations:

- Every NH needs to know if they are meeting expectations
 - Doing good work now – and what success means – how can they tell
 - Are they are working toward advancing their skill and career?
- Feedback early and often helps them get there
 - From the manager, their Work Buddy, experienced professionals
 - Help NHs give and receive feedback professionally
- Examples
 - Projects are on time; communications about problems or being late are timely
 - No or few errors in the code
 - The design meets our standards and is well received by customers
 - Teams are coordinated and all the tasks are tracked (project lead)



Career Path considerations:

Every NH needs to understand the path to promotion and the process in this company

- Experienced NHs expect to discuss advancement and career but will seek the manager's perspective
- Early career NHs want to know the steps and expected performance to advance

Early career, specifically new graduates, may have ambitions – but they may not

- They are figuring out how to be a worker in a company in this role – and live on their own
- They aren't going to direct their careers – you need to help them find their passions
- If they are ambitious, they worry they will be seen as arrogant – expect and answer career questions

Assess the needs of each NH. Explain the promotion process. Respond to any and all questions about advancement and promotion. Early career NHs want to know the process even when they have no plan or any idea of what they'd like to do beyond learning and growing in this job. Managers in companies that discourage managers from directing the employee's career may be frustrated when NHs have no idea of their "passions" or goals. Offer challenges and see what resonates with them. Step early-career NHs into thinking about their career.

After 90 days, co-create a personal roadmap for career direction and success. Then consider what Career Buddy to connect them to.