



## The Team Onboarding Checklist

The Team Onboarding Checklist is a practical guide to ensure that new hires (NH) become connected and successful within their group or team. The checklist is based on research with managers and new hires, sponsored by [WITops.org](http://WITops.org)

It helps focus managers on what to do during each of four critical timeframes. These important activities are organized into planning for each of the four key relationships that NHs must build, and the four key dimensions of the job NHs must master for success.

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The manager must execute and oversee all team onboarding planning for NHs. Few managers are trained in how to onboard or how to manage a NH's social, emotional, and professional growth. Managers are busy. Often expected to work as well as manage, onboard multiple NHs at once, or simply have many direct reports needing their attention. Managers may not have enough time to spend planning team onboarding for each NH. This checklist can help. And it can be integrated into other onboarding requirements. Let this checklist help you define what to do to help your NHs thrive.

### 1 • BEFORE FIRST DAY

#### CONNECTION

##### MANAGER

- Communicate your excitement
- Give overview of what to expect
- Answer questions
- Get a personal statement

##### BUDDIES

- Pick the Work & Support Buddies
- Ask them to reach out to NH before

##### TEAM

- Give the team an overview of the NH
- Ask them to reach out to NH before

##### NETWORK

- Identify possible friends at work
- Share relevant interest groups

#### SUCCESS

##### TOOLS & INFO

- Communicate your excitement
- Give overview of what to expect
- Answer questions
- Get a personal statement

##### TEAM CULTURE

- Share real culture: hours, work at home, dress, group activities, fun
- Share home/work in practice: work-at-home day, sick kids...

##### JOB ROLE

- Share excitement & expectations for role
- Set up 1-1's with key work collaborators

##### PROJECT

- Share first project & collaborators
- Plan the next 3 months of projects

### 2 • FIRST DAYS

#### CONNECTION

##### MANAGER

- Day 1: Greet & spend time together
- Give overview of the business, work area & your management style
- Invite & answer all question

##### BUDDIES

- Work buddy introduces the job, techniques, & team
- Support buddies share their perspective

##### TEAM

- Hold a fun welcome event; share NH strengths & fun bio's
- 1-1s with key co-workers; not just drop-in's

##### NETWORK

- Connect NH to potential work friends
- Share goals & expectations of key managers

#### SUCCESS

##### TOOLS & INFO

- Day 1: all equipment, tools & access to information working. IT Buddy is point person.
- Start reviewing Team/Job links & deck

##### TEAM CULTURE

- Help NH learn the team culture & daily work-life activities
- Share best way to communicate with co-workers

##### JOB ROLE

- Share work techniques & expectations
- Meet with collaborators doing the same job role

##### PROJECT

- Start NH on first project with Work Buddy
- Share work plan for the first weeks

 Download the full checklist for more detailed guidance: [www.witops.org/onboarding](http://www.witops.org/onboarding)



### 3 • FIRST WEEKS

#### CONNECTION

##### MANAGER

- Check in often, beyond 1-1's
- Pay attention to NH overall adjustment

##### TOOLS & INFO

- Ensure all tools & information can really be accessed
- Company Buddy: Introduce Company Document & key physical places

##### BUDDIES

- Work Buddy partners on first project; guides & gives feedback
- All buddies check in & answer questions

##### TEAM CULTURE

- Explain/train NH in team & role work techniques
- Explain values & appropriate behavior for meetings

##### JOB ROLE

- NH shadows & participates to learn job role
- Explain how NH job fits with other collaborating roles
- Explain role boundaries & watch for conflict

##### TEAM

- NH continues 1-1's with co-workers until all met
- NH participates in work meetings; invite their ideas

##### NETWORK

- NH meets influencers to understand their priorities
- Co-workers invite NH to interesting events
- Monitor NH work quality & success
- Give lots of feedback & examples of quality
- Share work plan for the first 3 months

### 4 • LAUNCH

#### CONNECTION

##### MANAGER

- Monitor if NH is launched
- Give NH challenges
- Explain path to career success

##### TOOLS & INFO

- Ask NH to help others with tools
- Ensure NH understands important corporate rules

##### BUDDIES

- Buddies remain go-to support people
- Look for a Career Buddy to guide NH's professional growth

##### TEAM CULTURE

- Monitor team culture to ensure the team is working well after introducing new people

##### TEAM

- Ensure NH fully participates in the team's work; that they are heard & valued

##### JOB ROLE

- Monitor progress. Is NH successfully delivering, collaborating & influencing?
- Coach success for NH's level of experience

##### NETWORK

- Showcase NH success to influencers
- Help NH key career influencers
- Ensure NH is connected socially

##### PROJECT

- Plan work & participation challenges appropriate to NH skill level
- Check if NH is happy with projects, adjust accordingly