WIT ops
Changing the Paradigm for Women in Tech

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**. 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.

LAUNCH
FIRST WEEKS
FIRST DAYS
BEFORE FIRST DAY
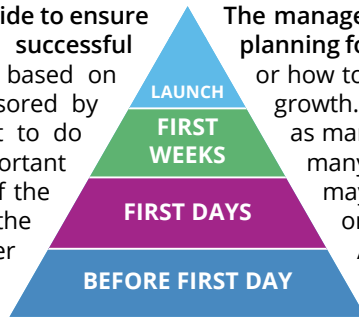
The manager must execute and oversee all team onboarding planning for NHs. Few managers are trained in how to onboard or how to manage a NH's social, emotional, and professional growth. Managers are busy. Often expected to work as well as manage, onboard multiple NHs at once, or simply have many direct 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.

👉 **All work at WITops is done by worldwide volunteers. Please join us.**

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 tp 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

3 • FIRST WEEKS

CONNECTION

MANAGER
- Check in often, beyond 1-1's
- Pay attention to NH overall ad-justment

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

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

SUCCESS

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

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

PROJECT
- 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

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

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

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

SUCCESS

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

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

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

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

⬇ **Download the full checklist for more detailed guidance: www.witops.org/onboarding**