

New Manager Onboarding Checklist

Onboarding & Training

MANAGER NAME	START DATE	DEPARTMENT	REPORTS TO
	___/___/___		

WEEK 1 — ORIENTATION & ACCESS

- | | |
|--|--|
| <input type="checkbox"/> Standard employee orientation completed | <input type="checkbox"/> Team org chart and role descriptions reviewed |
| <input type="checkbox"/> IT systems and email access confirmed | <input type="checkbox"/> Building access and parking sorted |
| <input type="checkbox"/> HR systems access — leave, timesheets, appraisals | <input type="checkbox"/> Office or workspace set up |
| <input type="checkbox"/> Finance system access — budget, expenses, POs | <input type="checkbox"/> Mobile phone and business cards ordered |

WEEK 1–2 — TEAM & STAKEHOLDERS

- | | |
|---|--|
| <input type="checkbox"/> One-on-one with each direct report | <input type="checkbox"/> Key peer introductions (other dept heads) |
| <input type="checkbox"/> Team meeting — introduction and listening | <input type="checkbox"/> Key customer or stakeholder introductions |
| <input type="checkbox"/> Meeting with hiring manager — expectations | <input type="checkbox"/> Predecessor handover notes reviewed
<small><i>If available</i></small> |
| <input type="checkbox"/> Meeting with HR business partner | <input type="checkbox"/> Open issues and pending decisions identified |

MONTH 1 — UNDERSTANDING THE BUSINESS

- | | |
|---|---|
| <input type="checkbox"/> Department strategy and goals reviewed | <input type="checkbox"/> Team capabilities and development needs |
| <input type="checkbox"/> Budget overview and current spend position | <input type="checkbox"/> Compliance obligations for this role |
| <input type="checkbox"/> Key performance metrics understood | <input type="checkbox"/> Vendor and supplier relationships identified |
| <input type="checkbox"/> Current projects and their status | <input type="checkbox"/> 30-day check-in with hiring manager |

MONTH 2–3 — LEADING & DELIVERING

- | | |
|--|--|
| <input type="checkbox"/> 90-day plan created and shared | <input type="checkbox"/> First performance conversations held |
| <input type="checkbox"/> Quick wins identified and delivered | <input type="checkbox"/> Cross-functional relationships developing |
| <input type="checkbox"/> Regular team meeting cadence established | <input type="checkbox"/> Any underperformance issues addressed |
| <input type="checkbox"/> One-on-one rhythm with each direct report | <input type="checkbox"/> 90-day review with hiring manager |

SIGN-OFF

Onboarding experience feedback

Outstanding items or support needed

New manager signature

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Hiring manager signature _____

Notes

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