Onboarding new managers checklist | Workable

The following checklist will help you properly onboard new managers, whether they’re new hires or current employees.

* **Highlight your company’s management culture.** Do this by sharing:
  + A video that showcases your values and ways of working
  + A book that echoes your management style
  + A message from your leadership that conveys your company’s mission
* **Explain what’s expected of managers at the end of each month, quarter and year.** This will help new leaders understand short-term and long-term goals and focus on results. Include company-wide, department and individual goals and make sure to cover how you keep track of progress (for example, using reports or a task management tool.)
* **Brief** **managers on individual team members.** Describe the department’s structure (for example, their direct reports and who their supervisor reports to) and where their department fits within the entire organization. Also, mention any recent:
  + Promotions
  + Conflicts
  + Hires
  + Separations
* **Schedule one-on-one meetings with relevant coworkers.** Make sure new managers meet with people they’ll work closely with, including:
  + Their direct supervisor
  + Their team members
  + Other managers
* **Enroll managers in regular management trainings.** Leadership abilities are difficult to cultivate, particularly for those who are new to senior positions. Schedule trainings on:
  + **Motivation:** Managers need to inspire team members to remain productive, despite difficulties.
  + **Conflict management:** Disagreements could arise within a team and a good manager should not let issues escalate.
  + **Time management:** Team leaders manage deadlines and delegate tasks, so they need to know how to prioritize work and complete tasks on time.
  + **Team management:** Managers should learn how to coach team members on-the-job, track performance and plan career paths.
* **Give an overview of your employee performance review process.** Describe:
  + The review process you follow (for example, 360° evaluation, 1:1 meetings)
  + The software you use
  + The frequency of performance reviews (for example, quarterly or annual)
  + The criteria you use to evaluate performances
* **Describe your most important company policies and how to monitor whether team members follow them.** Note that managers should have an in-depth understanding of how your company operates to set a good example for their team. Policies you should highlight are:
  + Leave policies (including paid time off and sick days)
  + Security policy
  + Remote work policy
  + Confidentiality policy
* **Describe how your company recognizes and rewards employees:** Cover:
  + Monetary bonuses (e.g. based on performance)
  + Non-monetary rewards (e.g. additional paid days off after a big project)
  + Ways to acknowledge success (e.g. a “thank you” on your company messaging app)
* **Explain your company’s recruiting process.** Mention:
  + Your hiring plan review process
  + Your internal mobility policy
  + Your recruitment policy
  + Any recruiting software you’re using
* **Explain what their team budget includes.** Team leaders are usually responsible for budgets that can be used on: 
  + Trainings
  + Resources (e.g. books)
  + Subscriptions (e.g. online courses)
  + Software and hardware
  + Team-building activities

* **Schedule periodical meetings between new managers and your HR department.** Make sure they are fully settled in their new role and allow them to address any questions they may have during their first 30, 60 and 90 days.