

Onboarding Checklist for Leaders

Pre-boarding

The goal of the preboarding phase is to plan and prepare for the leader's arrival and to ensure a successful entrance into the organization.

- Determine who will serve as the onboarding point(s) of contact for the new hire
- Determine who will be responsible for the execution of each onboarding item on this checklist
- Send an email to the new leader that contains the following. It is recommended that the welcome email come from the senior leader for the area.
 - A note of congratulations and a warm welcome to the unit
 - The contact information for the established point(s) of contact
 - Links to [relocation resources](#), if applicable
 - The New Leader Guide to Virginia Tech
- Provide a briefing book/resource guide about your unit. Consider including items such as:
 - Bios of direct reports
 - Information about the unit, such as:
 - History of the unit and any accolades or other relevant “highlights” of the unit
 - Mission and values
 - Organizational and leadership structure
 - Acronyms used by the organization
 - Advisory boards/other stakeholder group info
 - Student data, if applicable
 - Lists of recurring meetings
 - Maps and building(s) information
- Order nameplate, nametag, and business cards
- Order keys and secure wipe accesses, if applicable
- Prepare the workspace including office supplies, phone set-up, and computer
- Add them to departmental calendaring systems, shared drives, and give them access to other resources that might help them become familiar with the unit before they arrive
- Request any university system accesses that will be needed before the first day
- Pre-populate the leader's calendar with tasks in the framework as well as other essential activities and training (e.g., meetings with other senior leaders, direct reports, time to complete new hire compliance trainings, etc.)
- Update internal communications, distribution lists, email lists, organizational charts, and other communication channels with their contact info
- Put together a welcome gift for the first day. This might include university/unit-branded items
- Assign a resource contact/colleague for the leader. This resource contact can serve to accelerate the new leader's ability to quickly address and deal with early confusing issues. Questions about “normal protocol” in the organization, finding the right people to go to for information, correct procedures, and learning

what is “right” and “wrong”. Be sure the resource contact understands these responsibilities.

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Day 1 / Week 1

The goal of the first day is to ensure the leader is welcomed into the organization by senior leadership and staff. The first week should be dedicated to the deliberate introduction and acclimation of the leader into the organization as well as helping them understand the unit and its issues.

- Remind the leader they have a free printable parking permit for the first 30 days. This should be printed the day before or the day of the first use
- Plan a get-together, such as a coffee break, lunch, or meet and greet, to welcome the new leader on the first day
- Complete the I-9 verification process with the employee
- Ensure that they sign up for and attend the benefits orientation in the first 30 days
- Allow time for them to obtain their Hokie Passport
- Complete additional forms specific to the department or position, (i.e. confidentiality agreements.)
- Introduce the leader to direct reports, staff, senior leaders, etc.
- Request any university system accesses that were not obtained during pre-boarding
- Hold a briefing meeting or other forum where the leader can learn more about the workgroup, any “hot issues” that might require their attention within the first few months, and gain more perspective about the organization's history, culture, and priorities
- The leader should begin to review the list of key contacts and stakeholders and begin to schedule introductory calls/meetings
- The leader should begin their strategic planning groundwork. This might take the form of a set of strategic questions they should ask and get the answers to over time
- Provide the leader with any resources, tools, and time to successfully accomplish tasks in this phase
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First 30 days

The goal is to continue building relationships and partnerships and understand the organization and stakeholders.

- Ensure that they signed up for and attended the benefits orientation in the first 30 days
- Ensure their health elections have been submitted by the end of the 30 days and remind them that the retirement elections must be submitted within 60 days
- If the leader is using a free 30-day pass, ensure they have obtained a parking permit by the end of the 30 days
- Review transaction approval role and any administrative training needed
- Facilitate networking opportunities and provide resources to make networking possible

- The leader should continue contacting and setting up meetings with stakeholders. They can work with their manager to identify any additional stakeholders.
- Regular touchpoints with the leader's manager should be scheduled to review strategy and outcomes
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- _____
- _____

First 90 days

The goal within the first 90 days is to build the leader's competence in the job and provide frequent opportunities for feedback.

- Remind them that retirement elections must be submitted within 60 days
- Continue any needed administrative training
- Regular touchpoints with the leader's manager should be scheduled to review strategy and outcomes
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First 6 months

The goal is to provide guidance and feedback to ensure continued success.

- Regular touchpoints with the leader's manager should be scheduled to review strategy and outcomes
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First Year

Within the first year, the goal is to monitor the leader's performance, individual development, goals, and desires, and to engage the leader in advancing their unit's mission.

- The leader will have their annual performance review
- A roadmap/plan for long-term success should be developed by the leader with input and support from their manager
- Acknowledge the leader's first anniversary
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