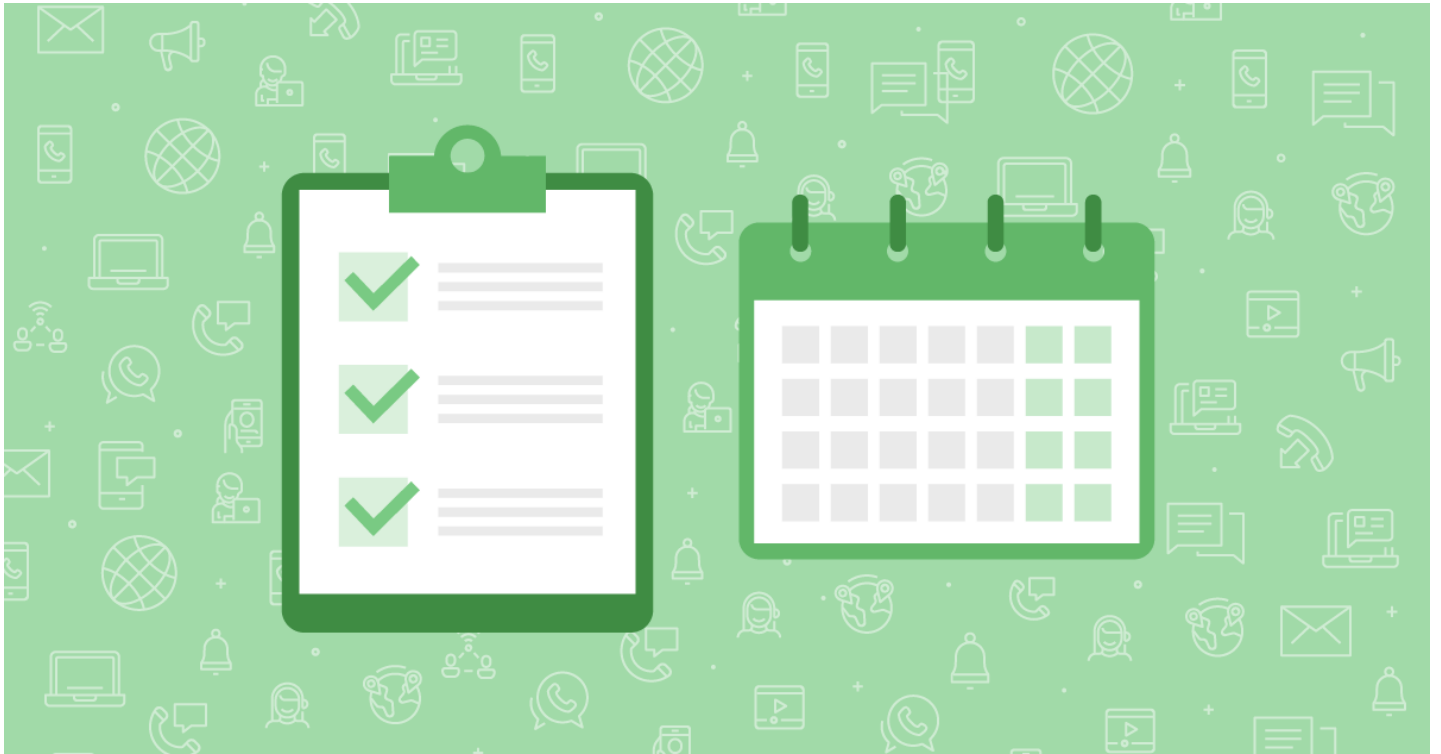


Manager Onboarding Checklist

Use this onboarding checklist to ensure your new managers have an efficient and successful onboarding experience when joining your company/brand/team.



• DOCUMENTS & SET UP

- Employee folder created (paper and/or digital)
- Employee has complete W-9 and other employment documents
- Employee has provided direct deposit/bank information
- Employee has provided all relevant contact information
- Employee has received welcome packet and training documents/manual
- Employee has received a copy of the employee and management handbook
- Company culture documents (include dress code, professional ethics, and the code of conduct)
- Compensation and benefits documents
- Employee has been set up in your systems (payroll, scheduling, POS, etc)

• MANAGER TRAINING

- Management job description and responsibilities have been reviewed
- Short and long term goals have been reviewed
- Daily, weekly, monthly, quarterly goals/expectations have been reviewed
- Reviewed policies for employees (vacation, leave, confidentiality, remote work, request time off, sick days)
- Give an overview of the company's/brand mission and goals
- Reviewed employee performance review process
- How company/brands recognizes and rewards employees
- Manager software onboarding training
- Department structure has been reviewed
- Department meeting flow and frequency
- Company's recruiting/hiring process
- Team budget and what it's used for

• INTRODUCTION MEETINGS

- Team
- Direct supervisor
- Other managers

• ADDITIONAL TRAINING/CONTINUED TRAINING

- Motivation trainings
- Conflict management trainings
- Time management trainings

- Team management trainings
- Feedback (things to review/work on)
- Check-ins (one month, three months, six months)
- Praise (positive feedback/boost confidence)
- Questions and concerns (let new manager give feedback or ask questions)
- Set performance goals
- Manager performance review (3, 6,9 , and 12 months)

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