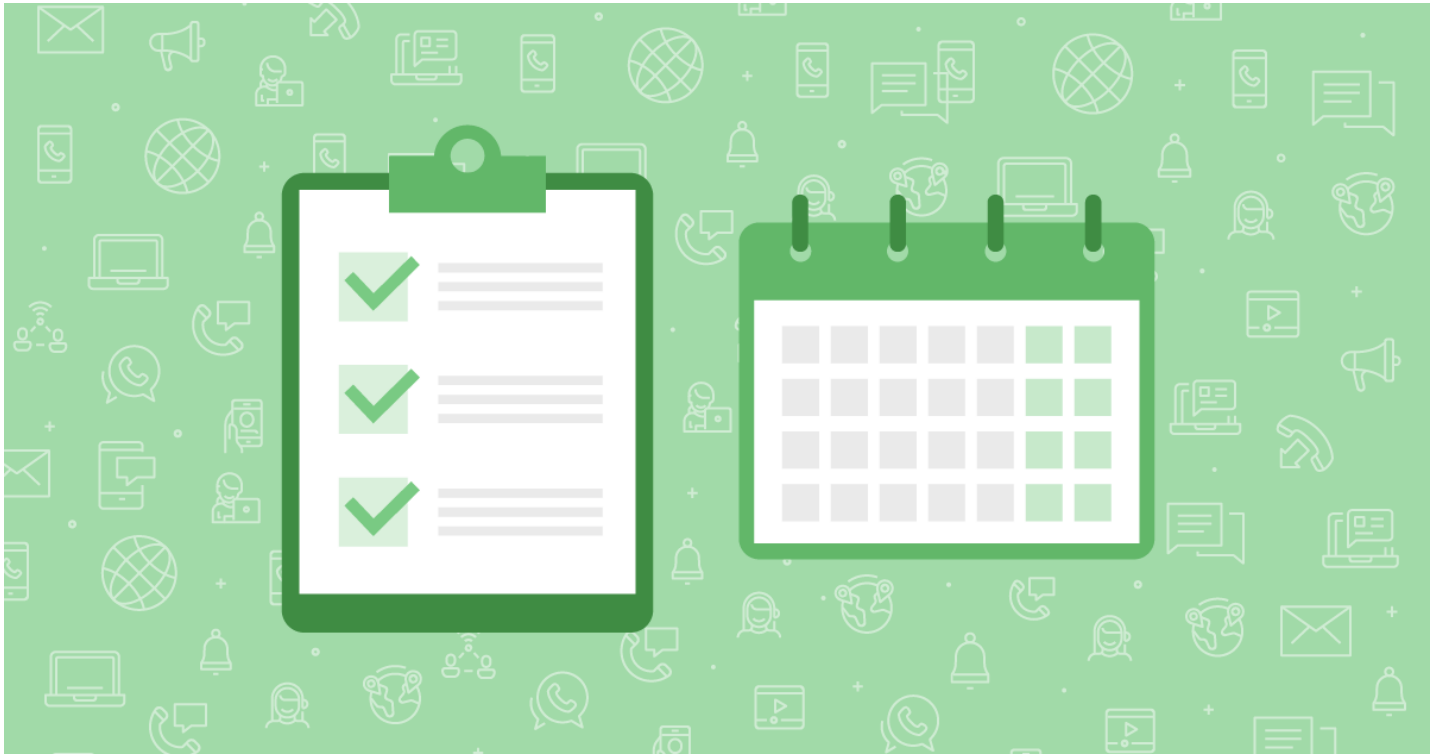# Manager Onboarding Checklist

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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