

## Executive and Leadership: Onboarding Checklist

To maximize your recruiting investment, it is crucial to consider a customized onboarding approach for high potential candidates. Careful planning and preparation expedite assimilation, retention and success.

### Prior to Selection

- \_\_\_ 1. Align key stakeholders around role, capability requirements and responsibilities
- \_\_\_ 2. Determine success factors
- \_\_\_ 3. Integrate recruiting and interview process with current situation
- \_\_\_ 4. Agree on support, assimilation and onboarding components

### Prior to Day One

- \_\_\_ 1. Prepare those who report directly to the new position
- \_\_\_ 2. Clarify working relationships with key stakeholders
- \_\_\_ 3. Provide company and position background information (organization orientation - review programs, policies and procedures; advise on the specifics of challenges or issues facing the organization; orient to culture and norms)
- \_\_\_ 4. Conduct intake interview to offer support and clarify expectations (scope)
- \_\_\_ 5. Describe current on-boarding process and strategies to accelerate assimilation
  - Build blueprint for success (first 90 days and first year)
    - **Key business results**
      - \_\_\_ 1. Short-term wins and expectations
      - \_\_\_ 2. Priorities to accomplish within the first year
    - **Foundation for strong team performance**
      - \_\_\_ 1. Capabilities and assessment criteria for current talent
      - \_\_\_ 2. Communication and alignment with new team
    - **Partnerships with key stakeholders**
      - \_\_\_ 1. Internal network with key leaders
      - \_\_\_ 2. External resources and partnerships
    - **Personal Leadership strengths**
      - \_\_\_ 1. Personal success factors and potential derailers
      - \_\_\_ 2. Peak experiences and past performance

### Launch and Ongoing Support

- \_\_\_ 1. Welcome and introduce leader to staff and the organization
- \_\_\_ 2. Distribute announcement to external stakeholders; Introduce to the organization's partners, service providers and clients
- \_\_\_ 3. Determine develop needs and Co-develop a **90-day plan** with target activities, specific goals and ROI deliverables with regular toll gates with owners
- \_\_\_ 4. Preparing a final summary on-boarding report with achievements and next steps (Individual Development Plan)
- \_\_\_ 5. Assess on-boarding process
- \_\_\_ 6. Establish an Evaluation Process