

Innolect Executive and Leadership Onboarding Checklist

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

Prior to Selection

- ___ 1. Align key stakeholders about 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 position and company 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 onboarding 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** (apply capabilities)
 - ___ 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 development needs and co-develop a **90 day plan** with regular toll gates with owners for target activities, specific goals and ROI deliverables.
- ___ 4. Prepare a final summary onboarding report with achievements and next steps (Individual Development Plan).
- ___ 5. Assess onboarding process.
- ___ 6. Establish an ongoing evaluation process for new hire.