

Onboarding Checklist

Starting Your Ideal Leadership Role With A Bang



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Onboarding Checklist

Place a mark as you complete each item. Be proactive. At the start of each period, put into your diary the actual activity, where you will be and who you will doing it with. You've got a much better chance of actually achieving each of the key milestones/outcomes if you put it in your diary.

Week 1 Measure Of Success Checklist	
I have been introduced to the people in my team (up, down, across)	
I know what to do if i am (or someone in my team is) sick and can't come to work	
I have reviewed and am committed to the Code Of Conduct and Values	
I have met with the People & Culture person responsible for my area	
I have an up-to-date Organization Chart for my Division and Department	
I know how our business unit fits within the overall company structure	
I know where to find Organization Charts for other Divisions	
I have been provided with and/or know where to source copies of the Corporate Vision and other supporting strategies	
My manager and I have discussed, and I have a clear understanding of my role responsibilities and requirements	

Week 2 Measure Of Success Checklist	
My Manager and I have agreed upon my goals for the next month	
My Manager and I have discussed how we will interact on a regular basis (email, face-to-face etc)	
I understand the Corporate Vision and the impact my role has on it	
I have reviewed the Operational/Department Business Plan and understand how my role and my team impact on its success	
I know where to find Policies on the intranet	
I have read and understood key policies	
My Manager and I have begun identifying a "Let's Transform This"	
I know which regular meetings I need to attend, when they are my role	
I understand how our Division and Department fit into the organization	
I have been to another Division for a site visit	
I have used the Values and our Department behaviors during the past week	
I have met with all my Direct Reports and have shared a consistent message with them, as I have listened and gathered information	
I have got an Acronym/Jargon buster list	
I know how to self-manage Leave Applications and approve Leave applications for my direct reports	

Week 3 Measure Of Success Checklist	
I understand how my performance will be measured and what results are important	
My Manager and I have begun a conversation about the resources myself and my team might need (physical, tie, influence, \$ etc)	
I am getting a good handle on the pain points and key challenges in my role	
I have a good understanding of the roles and responsibilities of each go my team members	
I have a good understanding of what my team requires from me	
I have proactively met with all the Key Stakeholders (up/ down/ across) who interact with my area of responsibility and have provided information on my background, vision and style	
<p>I know how to find, use and submit the following Commonly Used forms:</p> <ul style="list-style-type: none"> • Change of Banking and Employee Details • Out of Pick Expenses • Learning and Development Application • Travel Request Form • Entertainment and Hospitality Expenditure • Invoice Request • Request New Vendor 	
I understand the performance evaluation system	
I have a clear set of performance goals that my performance will be evaluated against	

End 1st Month Measure Of Success Checklist	
I have met with my Manager and discussed my progress to date	
I have assessed how far down in the organization the vision, strategy and values are used to inform decision-making and drive behaviors. I have made decisions about what I want to influence, what I'll need to live with and I want to address	
My Manager and I have discussed my observations of the culture	
My team and I have discussed my observation of the culture	
My team and I have mapped out and analyzed our key processes and have out plans in place for improvement	
I understand my Manager's hot points and how I can best support him or her	
I have help a team meeting and shared my expectations, vision	
I have identified and implemented at least 3 early wins the team could achieve	
I have identified and implemented at least 3 early wins I personally can achieve (for example remove minor, but annoying irritants (e.g. excessive/ poorly run meetings, improve work flow or resources, remove unnecessary bureaucracy)	
I have identified the behaviors that need to shift in my team and I have begun role-modeling them and speaking about them to the team	
My Manager, my team and I have agreed on a "Let's Transform This" and have detailed what success looks like	
<p>We have described the perfect end-results of the "Let's Transform This"</p> <ul style="list-style-type: none"> • What you and the team have achieved • How people will be behaving • What they will be doing differently • What they will be talking about • what you will be seeing/hearing that is different • What others outside your team will be saying 	
I understand and can explain the key priorities of each of the Divisions	
I understand and can explain how we interact with and impact upon other Departments	
I understand and can explain how we interact with and impact upon other Divisions	
My manager and I have created an Individual Development Plan for myself	

End 2nd Month Measure Of Success Checklist	
My team and I have developed an action plan for our "Let's Transform This"	
We have milestones and targets in place that measure the success of our "Let's Transform This"	
I have built momentum with my team on the Vision and expectations and I am regularly reinforcing the behaviors I expect	
I have completed my Trimetrix profile and have worked with my Manager to identify how to best use my strengths and minimize the impact of my weakness	

End 1st Quarter Measure Of Success Checklist	
I have met with my Manager and discussed my progress to date and Development plans for the next 12 months	
I have done some form of team building exercise with my direct reports	
I have created performance measures and my team and I are actively tracking performance	
I have provided performance feedback to all my team members (both formal and informally)	
I have identified the people in my team that I need to coach up or coach out	
My team and I have made progress in the "Let's Transform This"	
I have provided people & Culture with feedback about my on boarding experience	
I am meeting regularly with my Coach	

End 2nd Quarter Measure Of Success Checklist	
I have met with my Manager and discussed by biggest contributions to date and how my performance is tracking	
My Manager and I have discussed what I would like to focus upon through the remainder of the year	

End 3rd Quarter Measure Of Success Checklist	
I have attended learning and development programs and build relationships with people outside my direct sphere of influence/concern	
I have improved my skill/mindset in at least three different areas	
I have asked for and acted upon feedback from my team and my Manager	
I have coached up or coached out people who are not performing at their best	
I can describe at least six instances in the past month when I have used my Operating Principles and Non-Negotiables in conversations	

End 4th Quarter Measure Of Success Checklist	
I have discussed with People and Culture my experience of the first year	
I have re-set personal and professional goals	
I am building momentum in my team and settling in to make a positive impact	
I am starting to think about next roles Maybe 2-3 years down the track ... and the skill/mindset I'll need to start developing now to be ready for those opportunities	