**Leader On-Boarding Plan – External Hire**

Recruiting:

* Explain the role and be realistic
* Consider fit within the organizational culture

Interviewing:

* Think about fit
* Explain the role and be realistic
* Discuss expectations

Job Offer & Acceptance

Prior to Day One

* Request systems access
* Set up workspace (or request home office work equipment)
* Send a welcome letter
* Provide an agenda for the first week
* Enroll new leader in institutional training program(s) (if applicable)

Day One

* Orientation with HR (if applicable)
* Orientation with direct supervisor
* In-Office:
  + Tour the office
  + Meet new coworkers
* Remote:
  + Introduction to manager and key coworkers
  + Introduction to communication tools (e.g. Slack, Teams, etc.)
* Discuss week one agenda
* Set expectations
* Assign a mentor
* Help them set up their workspace
* Provide contact information
* Training

Week One

* Attend team meeting (if applicable)
* Training
* Verify they have the tools they need
* Have an end-of-week check-in scheduled
* Joint 1:1 sessions with new leader, hiring manager or outgoing leader, and new leader’s direct reports
* Team building activities

Week Two

* Assess new leader’s readiness to take over key duties
* Establish 30/60/90-day goals and expectations

First 30 Days

* Check-in meeting at the end (schedule in Week One)
* Employee should start performing job duties independently (with a mentor)
* Offer feedback

First 60 Days

* Check-in meeting at the end (schedule in Week One)
* Discuss how the onboarding process went – collect information on what went well and what needs improvement
* Discuss goal progress

First 90 Days

* Check-in meeting at the end (schedule in Week One)
* 90-day performance evaluation
* Discuss goal progress

First Year and Beyond

* Complete training
* Continual development
* Performance evaluation

**Leader Re-Boarding Plan – Internal Promotion**

Recruiting:

* Explain the role and be realistic
* Consider fit within the organizational culture
* Evaluate current performance and knowledge, skills, abilities (if possible, seek this information from the candidate’s current supervisor)

Interviewing:

* Think about fit
* Explain the role and be realistic
* Discuss expectations

Job Offer & Acceptance

Prior to Day One

* Request systems access (for an internal hire consider what access the employee currently has that they should not have in their new role)
* Ensure that employee has the appropriate workspace and equipment (set up new workspace if required)
* Send a welcome email or introductory survey
* Provide an agenda for the first week
* Enroll new leader in institutional training program(s) (if applicable)

Day One

* Orientation with HR (if applicable)
* Orientation with direct supervisor
* Meet with any new/key coworkers
* Discuss week one agenda
* Set expectations
* Assign a mentor
* Help them set up their new workspace (if applicable)
* Training

Week One

* Attend team meeting (if applicable)
* Training
* Verify they have the tools they need
* Have an end-of-week check-in scheduled
* Joint 1:1 sessions with new leader, hiring manager or outgoing leader, and new leader’s direct reports
* Team building activities

Week Two

* Assess new leader’s readiness to take over key duties
* Leader Launch sessions – 2-3 hours each day
* Establish 30/60/90-day goals and expectations

First 30 Days

* Check-in meeting at the end (schedule in Week One)
* Employee should start performing job duties independently (with a mentor)
* Offer feedback

First 60 Days

* Check-in meeting at the end (schedule in Week One)
* Discuss how the onboarding process went – collect information on what went well and what needs improvement
* Discuss goal progress

First 90 Days

* Check-in meeting at the end (schedule in Week One)
* 90-day performance evaluation
* Discuss goal progress

First Year and Beyond

* Complete training
* Continual development
* Performance evaluation