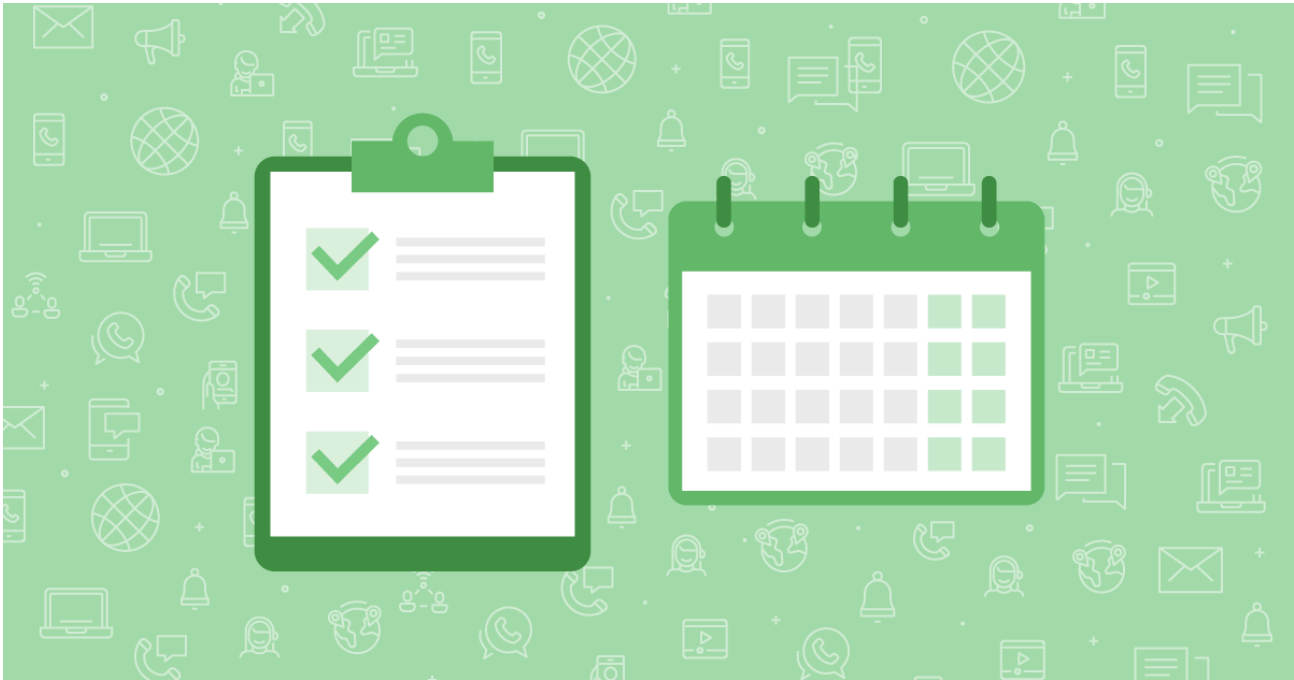


# Manager Onboarding Checklist

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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