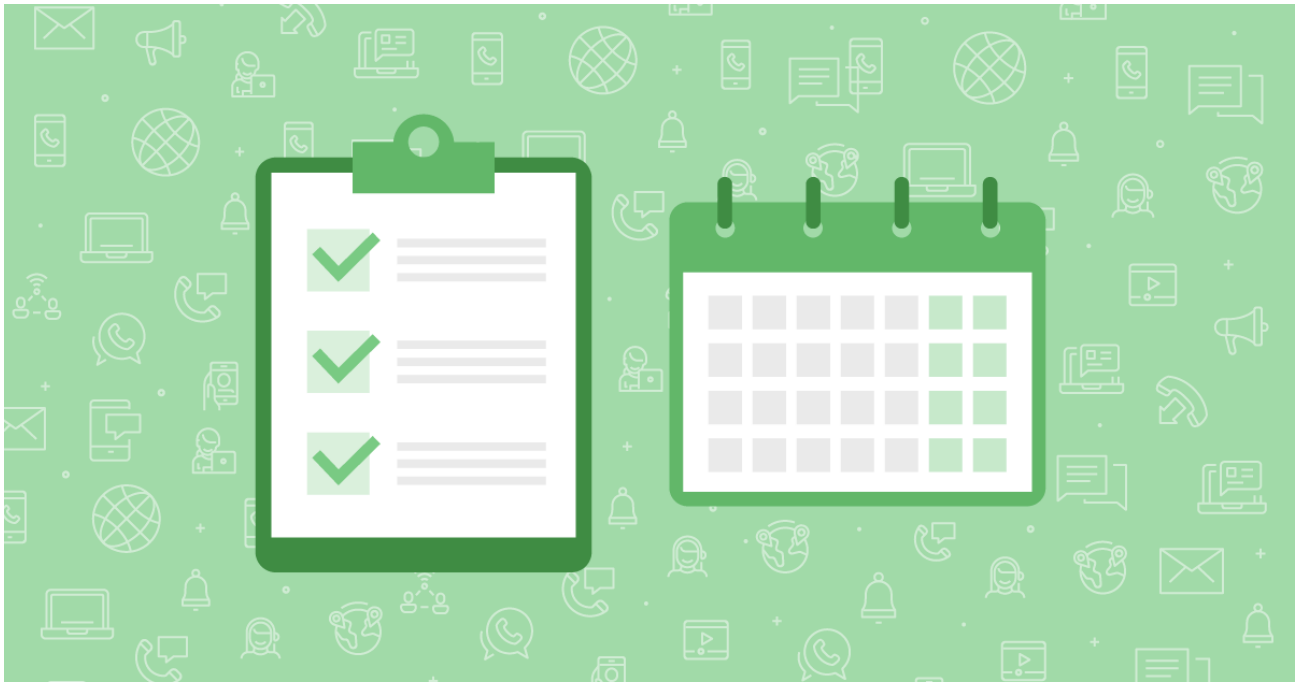
Manager Onboarding Checklist

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)
- [ ] Praise (positive feedback/boost confidence)
- [ ] Questions and concerns (let new manager give feedback or ask questions)
- [ ] Set performance goals
- [ ] Check-ins (one month, three months, six months)
- [ ] Manager performance review (3, 6,9 , and 12 months)

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