Onboarding Planning Toolkit

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| About This ResourceThis resource is intended to help managers plan out your onboarding process by thinking through the key topics you should cover in the first month with your new hire. Note that this resource does *not* include onboarding-related administrative topics (HR, finances, technology, operations, etc.).**Here’s what’s included:*** Topics to Cover in Onboarding Meetings:
	+ [Organizational & Team Context](#umc1v1x1ksdc)
	+ [Roles, Goals, and Other Expectations](#k18089kd6j5f)
	+ [Training & Development](#w0j0z1bk78b)
	+ [Getting to Know Each Other](#r9olonqnyal)
* [Sample Schedule](#argkus42ggv3)

For additional tools and resources, check out:* [Effective New Hire Onboarding: 4 Tips For Busy Managers](https://www.managementcenter.org/article/effective-new-hire-onboarding-4-tips-for-busy-managers/) *(we recommend reading this before diving into this toolkit!)*
* [Onboarding Checklist](https://www.managementcenter.org/resources/onboarding-checklist/)
* [30/60/90 Day Goal-Setting Template](https://www.managementcenter.org/resources/30-60-90-day-goal-setting-template/)
* [Tips for Conducting a 90-Day Discussion with Your New Hire](http://www.managementcenter.org/article/tips-for-conducting-a-90-day-discussion-with-your-new-hire/)
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# Topics to Cover in Onboarding Meetings

## Organizational & Team Context

Understanding the backdrop of their work will set your new employee up to better navigate their role. Being familiar with the history, traditions, and shared language of any group is a prerequisite for experiencing belonging in a group, especially for folks with more marginalized identities. At some organizations, your organizational context might be covered by someone else, such as your HR person. If it’s not, make sure to include it in one of your initial onboarding meetings.

For large and mid-sized organizations—especially remote ones—your department or team likely has its own traditions, values, and ways of operating that are distinct from your broader organizational culture. Be sure to share those too. Don’t forget to share key documents in advance!

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| **Organization** | **Team** |
| * Mission, vision
* History, values, equity statement
* Annual goals, strategic plan
* Organizational structure and systems (databases, communications platforms)
 | * Context, history, tips for working with other teams
* History, values, and culture of your team
* Brief bios of teammates (and set up one-on-ones!)
* Platforms, documents, and tools you use for alignment and communication
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## Roles, Goals, and Other Expectations

All else being equal, nothing will matter more for the success of your new hire than your alignment on what they’re expected to contribute and accomplish in their role. Clarity of purpose is essential for belonging. It’s also an opportunity for them to feel valued and entrusted—be explicit about the strengths and talents you observed in them during the hiring process and express your confidence in their abilities.

**Make sure to cover:**

* [Role expectations](https://www.managementcenter.org/resources/role-expectations/) to help them understand the full scope of their role.
* Their [30, 60, and 90-day goals](https://www.managementcenter.org/resources/30-60-90-day-goal-setting-template/)
* Your expectations for [check-ins](https://www.managementcenter.org/resources/check-meetings-sample-agenda/): how frequently you hold them, who owns the agenda, and the deadline for prepping it
* The **tools and practices** you will use, such as [MOCHA](https://www.managementcenter.org/resources/assigning-responsibilities/), [2x2 feedback](https://www.managementcenter.org/resources/2x2-feedback-form/), [debriefs](https://www.managementcenter.org/resources/debriefing-template/), and repeat-backs

## Training & Development

Identify the top two or three skill/knowledge areas you want to work on together in the first 90 days and share your plan for development.

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| **Learning Opportunity***Include tasks or projects that will double as learning/alignment activities* | **Purpose***What you hope they will learn/gain from the experience* | **Notes & Context** *Anything else that would be helpful for them to know* |
| *Lunch with José Ortiz, Director of Organizing* | *Learn about José’s annual organizing plan and how [new hire’s] communications work will support it.* | *José just got back from parental leave.* |
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## Getting to Know Each Other

In a hierarchical organization, every management relationship has at least one line of difference and power—position. There might be other ones too—particularly around race, class, gender, ability, and sexual orientation. Given that, it’s important to talk about how you will work together.

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| **Access Needs[[1]](#footnote-1)**  |
| Checking in about access needs—things that people need to communicate, learn, or fully participate in an activity—is one way to create a space that values access and fosters belonging. Keep in mind that some people may not feel comfortable disclosing to you; some may be new to the concept of access needs. |
| **Reflection Questions** | **Sample** |
| * What are some tools, practices, or accommodations that make it easier for you to show up with your full capacity (physically, mentally, emotionally)?
* What are some barriers you experience and what are potential mitigations?
 | * *Do you have access needs or considerations you’d like me to know about? No need to disclose medical info or share right now, but I want to do what I can to make your work more doable. You may have already talked to HR about this (and if not, here’s how to let them know.). We’ll also revisit this periodically in the future, so feel free to sit on this.*
* *Heads up about me: I have some hearing loss on the left side, so you'll often see me sitting to your left / using the auto-captioning feature.*
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| **Schedule/Hours** |
| **Reflection Questions** | **Sample** |
| * What’s your typical schedule? Is there a schedule you expect them to keep?
* Do you have no-meeting days?
* Do you have email boundaries?
* Are there organization-wide practices/norms they should be aware of?
 | * *In order to serve our students/clients well, our schedule is X to X every day with breaks at Y and Y. If you need to be absent, please use Z protocol to let me know as soon as possible.*
* *My schedule is normally X and I keep Y free as a no-meetings day. You can text me after hours before Xpm. I don't usually check emails after X.*
* *Do you have any work schedule preferences?*
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| **Communications Preferences** |
| **Reflection Questions** | **Sample** |
| * How should they reach you for questions, requests, or to flag items for review?
* Do you use non-email communication platforms, such as chat, Slack, or text?
* Are there any organization-wide practices or norms that they should be aware of?
 | * *I’m usually responsive by email.*
* *Mark anything that’s urgent or time-sensitive in the email body.*
* *If you need to reach me on weekends (for any reason), text is best.*
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| **Leadership/Communication Styles** |
| **Reflection Questions** | **Sample** |
| * How would you describe your leadership, management, or communication styles?
* How do you prefer to give/get feedback?
* How do your identities and experiences influence how you show up at work?
 | * *I tend to be a big picture thinker who doesn’t fixate a lot on details, except when it comes to tasks that have to do with X and Y.*
* *When I get feedback, I sometimes need to sleep on it so that I can fully digest it. I always try to follow up within a few days.*
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# Sample Schedule

Below is a sample schedule you might share with your new hire to prepare them for the first week. When you share this, be sure to specify the time zone (if applicable) and meeting norms (such as keeping your video on/off if it’s virtual, permission to eat during calls, etc.). You might also share suggestions for what they can do during downtime.

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| **Week 1 Schedule** |
| **Day** | **Time** | **Item & Purpose** | **Notes** |
| Monday | 10-10:30am | Laptop set-up and configuration with Addae | <Zoom link> |
| 12-2pm  | HR and admin orientation #1 with Dave | Since this is during the lunch hour, feel free to bring your lunch! |
| 4-4:30pm | End of day one check-in with Manisha |  |
| Tuesday  | 11am-1pm  | Overview of organizational and team context and key information with Manisha  | You don’t need to review this before we meet, but if it’s helpful to see in advance, here are the documents I’ll be going over:* <link>
* <link>
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| 2-3:30pm | HR and admin orientation #2 with Dave | <Zoom link> |
| Wednesday  | 12-1pm | Team lunch to welcome you! | <Zoom link if virtual><Address if in-person>We’ll cover the cost of lunch! Send your order to Manisha by 9am. |
| 1:30-2:30pm | 1-1 with Roger to go over program strategy | Roger will share some reading in advance |
| Thursday | 10-11:30am | Overview and discussion of roles & 30/60/90 day goals with Manisha | You don’t need to review this before we meet, but if it’s helpful to see in advance, here are the documents I’ll be going over:* <link>
* <link>
 |
| 1-3pm | Walk-through of communications platforms with Jasmine |  |
| Friday | 10-11am | 1-1 with Sam  | This is just a getting-to-know-you meeting, so no prep needed! |
| 1-2pm | End of week one check-in with Manisha |  |

1. Coordinate with your HR person if there are specific accommodations needed. However, even if your new hire will be communicating with HR, you should still discuss this directly with the staff person. [↑](#footnote-ref-1)