

Onboarding-Your First Days

Action Item Checklist

Last Updated: November 2017

|  |  |
| --- | --- |
| **Name:** |  |
| **Role:** |  |
| **Start Date:** |  |
| **End Date:** |  |
| **My Supervisor:**  |  |

# Welcome to Chaucie’s Place!

Exciting. Overwhelming. Inspiring. Your first days at a new job can be many different things.

*(Not to worry. You don’t have to know everything at once.)*

We’ll help you get up and running by guiding you through the milestones of what you need to do, and when, throughout your entire first year.  Start with this *Your First Days Action Item Checklist* and then check back throughout the year.

Congratulations on your new position!

Table of Contents

Welcome to Chaucie's Place! 1

Your First Days- Getting Set Up 2

Your First 10, 30, 180, 360 Days 2-6

Appendix: 7

Meeting Guides: Initial Meeting with Leader and Core Partners **8**

Individual Development Plan **13**

# Your First 10 Days- Getting Set Up

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **TOPIC** | **ACTION** | **LINK** | **ADDITIONAL INFORMATON** |
|  | **WORKSPACE** | Login to your computer and set up password.Organize and personalize your workstation. |  | Your leader will most likely have your initial login information for you.Leader orAdministrativeAssistant will assist you. |
|  | EMAIL | Establish your work email. |  |  |
|  | OFFICE SUPPLIES | First, check with your manager or department administrative assistant. They may already have supplies. |  |  |
|  | PHONESVOICEMAILPRINTER | Set up your voicemail. Map to Printer |  |  |
|  | MY SPECIFIC ROLE | Complete New Hire paperwork. |  | Your leader will provide you with roles and responsibilities |
| WELCOME EMAIL(s) | Review your welcome email for important information about new employee programs and resources, benefits enrollment and pay, and where to get answers to your questions. | OUTLOOK | You will receive regular emails checking in with you and asking you to provide feedback re: your first year of onboarding. We want to hear from you.  |  |
| EMERGENCY INFORMATION | Add your emergency contact information to the department’s contact list. |  | Review emergency procedures for your location. |  |
|  | EMAIL SIGNATURE | Create your email signature in Outlook.*In Outlook, click on File/Options/Mail/Create or modify signatures for messages.* |   |  |
|  | REVIEW POLICIES | * Social Media Policy
* Code of Conduct
* HR Policies
 |  |  |
|  | TIMESHEETS | Review the process for accurately documenting, recording, and submitting timesheets.  |  |  |
|  | MEET WITH YOUR LEADER | Meet with your manager to learn more about your role and responsibilities. Discuss the plan for your onboarding.  | IN PERSON OR ON THE PHONE | Schedule for future meetings and frequency will be communicated by your leader |
|  | MEET WITH MY PARTNERS | Your leader/connector will suggest partners for you to meet with.  | IN PERSON OR ON THE PHONE |  |
|  | NEW EMPLOYEE WELCOME(NEW) | Check with your leader to see if you are scheduled to meet the Board at the next Board meeting. |  |  |
|  | TRAVEL AND EXPENSES | If you will be traveling for your role, review the current policies for expenses and reimbursement. |  |  |

**Your First 30 Days Action Items**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **TOPIC** | **ACTION** | **LINK** | **CONTACT OR MORE INFORMATION** |
|  | * **BENEFITS**
 | Make an appointment to discuss Retirement Plan options. |  | Chaucie’s Place |
|  | **NEW EMPLOYEE TRAINING** | Follow the New Employee Training Guide including attending live Program Events.  |  | Your leader will assist you in developing a customized Training Plan.  |
|  | **DIVERSITY AND INCLUSION** | Explore our commitment to building an inclusive environment where everyone feels valued. Determine timeline to join a group and get engaged. |  |  |
|  | **APPRECIATION** | Has a fellow CP professional been helpful during your onboarding? Recognize them. Attend Engagement events regularly and take ownership in their development.  | Send an email or recognize in a group meeting.  |  |
|  | **MY SPECIFIC ROLE/ORGANIZATION** | CREATE CUSTOM TO DO’S FOR ROLE SPECIFIC SHARED DRIVES, SOFTWARE, WEBCAM, TRAINING, EQUIPMENT) |  |   |
|  | **NETWORKING & PROFESSIONAL DEVELOPMENT** | Develop a 30, 60, 90 Plan on how you can network across organizational and community lines.  |  |  |

# Your First 90 Days Action Items

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| --- | --- | --- | --- | --- |
|  | **TOPIC** | **ACTION** | **LINK** | **CONTACT OR MORE INFORMATION** |
|  | **Chaucie’s Place OVERVIEW** | Deliver your CP “Elevator Speech” with passion and confidence. Be able to tell CP’s story to others with conviction and persuasion.  |  |  |
|  | **PERFORMANCE MANAGEMENT MEETING** | Schedule time with your leader to discuss our performance management process. |  | Review the job aids on this site for useful information.  |
|  | **INDIVIDUAL DEVELOPMENT PLAN** | Discuss with your leader whether or not your role has a need for this at this point in your onboarding. |  |  |
|  | **PERFORMANCE OBJECTIVES** | Set Outlook reminders to update your objectives. |  |  |
|  | **EMPLOYEE REFERRALS** | Consider referring your friends or family to open positions. You’ll be rewarded for each hire. |  |  |

# Your First 180 Days Action Items

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **TOPIC** | **ACTION** |  | **CONTACT OR MORE INFORMATION** |
|  | **PERFORMANCE OBJECTIVES** | Update your objectives to capture the progress you’ve made. |  |  |
|  | **ENGAGEMENT** | Explore new areas of Engagement and get even more engaged. |  |  |
|  | **LEARNING & DEVELOPMENT** | Have a discussion with your leader about all the available learning and development opportunities at CP. |  |  |

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# Your First 360 Days Action Items

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| --- | --- | --- | --- | --- |
|  | **TOPIC** | **ACTION** | **JUMPWORD or LINK** | **CONTACT OR MORE INFORMATION** |
|  | **PERFORMANCE MANAGEMENT** | Write and submit your Self-Evaluation. Plan next year’s objectives and discuss with your leader. |  |  |
|  |  |  |  |  |
|  | **EXPLORE YOUR CAREER** | Set goals with your leader and explore your future at CP. |  |  |
|  | **LEARNING & DEVELOPMENT** | Have a discussion with your leader and your wider team about the available learning and development opportunities at CP. |  |  |
|  | **MY SPECIFIC ROLE** |  |  |  |

# Appendix:

## Meeting Guide: Initial Meeting with Leader

Your direct leader plays a significant role in your growth, development and success. Schedule regular one-on-one meetings to build your relationship, learn to plan for success. Ask questions about Chaucie’s Place’s purpose and values; our mission; your role and team; key partners; and top priorities.

This is a great opportunity to work with your leader to build a plan to help you transition into your new role and the organization. To help you focus on critical topics, the following are suggested questions to discuss with your leader. Select the ones that will be most beneficial for you as you establish this new relationship.

| **Suggested Discussion Questions** |
| --- |
| **Our Working Relationship** | * What is the path that led you to CP?
 |
| * What are your responsibilities and how does your role fit within the organization?
 |
| * How would you describe your leadership style?
 |
| * How do you prefer that I communicate with you (e.g. email, phone, in person)?
 |
| * How do you like to be approached regarding an issue or challenge?
 |
| * How often would you like me to update you on projects or tasks?
 |
| * How often should we meet one-on-one?
 |
| **Our Business** | * What is the overall business strategy and what are the goals for the enterprise?
 |
| * What are the key business issues on which I need to focus?
 |
| * What are the technical or business systems critical to my role?
 |
| * What resources do I have to draw upon within our enterprise/organization?
 |
| * What obstacles or hurdles do I need to watch out for?
 |
| * Who, outside of our department, has influence/impact over the quality of our work?
 |
| * What relationships do I need to develop within and outside the organization? (use Key Partner Meeting Schedule)
 |
| * Will you help identify and set up introductory meetings with my key business partners and contacts? Will you help identify any distribution lists I need to be added to so I am included on regular meeting invitations?
 |
| **My Responsibilities** | * What do you see as my role in the business and in our department/enterprise?
 |
| * What are your expectations of me and my role?
 |
| * What are my objectives?
 |
| * What do you see as my key assignments to complete during my first 90 days? How about long term?
 |
| * How will my performance be measured and success evaluated?
 |
| * What are the keys to success for my role?
 |
| * What are the unwritten norms or expectations that I should know?
 |
| * What are the compliance/regulatory requirements of my role and how can I best learn Chaucie’s Place’s and our department’s appropriate procedures and processes?
 |
| * Who should I contact to schedule training on the critical technical/business systems necessary for my role?
 |
| * In what ways will you support me to develop and grow in this role?
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| **Additional Questions** |
|  |

## Meeting Guide: Peers

### Overview

One of the most successful ways to assimilate in your new role is to spend time with peers. Taking the opportunity to meet one-on-one with these individuals will help you understand objectives, expectations and deliverables as well as begin to develop important relationships. Much of your success at Chaucie’s Place and in achieving your objectives will depend upon your ability to develop relationships and influence your partners within and outside your scope of responsibilities.

### Guidelines

* Ask your manager to identify specific individuals it would be helpful to connect with, including internal partners (within and across organizations), vendors, and clients. Questions to consider when identifying these individuals include:
* What relationships do I need to develop within and outside the organization?
* Who can I meet to learn more about the overall mission and purpose?
* Who are the key partners with whom I will be interacting on a consistent basis?
* Which partners will be critical to my success at Chaucie’s Place?
* A 30 minute meeting is suggested to start. As appropriate, follow up to continue the conversation.
* Use or customize the remaining pages of this guide to plan and structure your conversations.

### Peer Meeting Schedule

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| --- |
| **Core Business Partner Meetings** |
| **Name** | **Title** | **Phone #/Location** | **Date/Time of Meeting** | **Discussion Points** |
|  |  |  |  |  |
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### Peer Meeting Suggested Topics

|  |  |
| --- | --- |
| **TOPIC** | **QUESTION** |
| **About Me** | * Brief biography/business experience.
 |
| * Explain why I joined Chaucie’s Place and/or moved to my current position.
 |
| * Provide an overview of my objectives.
 |
|  |
|  |
|  |
| **Tell Me About You** | * Brief biography/business experience.
 |
| * What are your department’s goals? Major initiatives?
 |
| * How do you see our roles/teams working together?
 |
| * How best can I work with/support you?
 |
| * What is the path that led you to this role?
 |
| * What other organizations or groups do you interact with on a day-to-day basis?
 |
| * What general advice or guidance do you have for me?
 |
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### Notes

**Individual Development Plan**

**Name:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**JobTitle:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Five step process**

While your performance objectives for the year should include personal development opportunities, you may wish to use this form to document your specific development activities related to your objectives and track your progress. Identify 1-3 areas where you would like to focus on development of your skills or abilities. Consider your business objectives for the year, in addition to reviewing your strengths, feedback received, and previous performance reviews to determine your areas for development.

Choose development activities, targeting a 70/20/10 distribution:

**70% Experience | Learning on the job**. Can include stretch assignments, job rotations, projects, and cross-functional teams.

**20% Exposure | Learning from others.** Can include networking, mentoring, informational interviewing, and volunteer activities.

**10% Education | Gaining knowledge.** Can include classroom/online training, workshops, seminars, books, certificate programs, and university degree programs.

Create a draft plan by entering information about your development goals into the form on page 2:

**Development goal.** Enter your development goal using SMART criteria. Describe the skill or competency you plan to develop.

**Description.** List the action steps or development activities you will take to accomplish the goal. Include success indicators and target dates for each.

Meet with your leader to discuss your development plan. Ensure you have a common understanding of your goals, including prioritization of areas for development and the specific actions you will take. When you have finalized your IDP, email this form to your leader.

Schedule regular development discussions with your leader. Use the Status section of this form to track your process, document your conversations, and develop next action steps. Your IDP should remain a living document that is updated with your ongoing development throughout the year.

