

ONBOARDING GUIDE

Employee:

Manager:

If people are the greatest driver of capacity make the most of your investment by setting new hires up for success starting on day one. Be clear on your expectations of them, and what they can expect from you as their employer, manager, and leader.

Initiate Focus Area		Success Is...	Milestones
Before start date	Set-up for success <ul style="list-style-type: none"> • Hardware • Software • Check-in, questions 		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
1st Week	People and firm <ul style="list-style-type: none"> • Co-workers • Clients • Partners 		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
1st Month	Their job <ul style="list-style-type: none"> • Responsibilities • Processes • Technology 		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
1st Quarter	Expand expertise, skills, and independence		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
6 months	Independence in role		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>