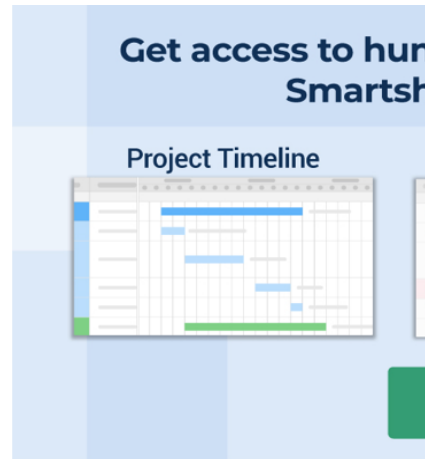




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# EXECUTIVE ONBOARDING

EMPLOYEE/EXECUTIVE ORIENTATION	
<b>EMPLOYEE/EXECUTIVE ORIENTATION</b>	
<b>ABOUT ORIENTATION</b>	
Orientation involves welcoming a new executive or employee and familiarizing them with the organization. It often includes meetings with supervisors and company leaders, introductions to staff and coworkers, information about the company's background, mission, goals, and culture, and learning policies, standards, and practices. It may also involve enrolling the employee in benefits and incentive programs or providing enrollment information.	Exe to n pro guid imp and
<b>ORIENTATION SNAPSHOT</b>	
Only happens once for new hires.	Is a
Takes place before or during the employee's first days of work.	Tak
Informs new hires about company operations, policies, and procedures.	Info
The same information is presented to everyone, regardless of role or skill level.	Offe
<b>ORIENTATION: GOALS AND OUTCOMES</b>	
Employees are familiarized with the organization's history, culture, policies, standards, mission, goals, and day-to-day processes.	Shc hire and deta
New hire paperwork is completed.	

Employees are enrolled in benefits and incentive programs (or given the necessary information to do so on their own).	Lon has ope sup the
Employees are given access to proprietary accounts, email, networks, and hardware/software.	

ORIENTATION AND ONBOARDING ROL	
NEW EXECUTIVE / NEW HIRE ORIENTATION	
ORGANIZATION RESPONSIBILITIES: PRIOR TO START DATE	
Send welcome letter confirming key information (e.g., position title, first day, schedule, location, salary, dress code).	Pro bad
Send introductory message to team, supervisors, and stakeholders.	Pro leac
Inform employee of payroll policies/frequency, sick, vacation, and holiday tim,; and benefits and incentive policies and programs.	Pre
Provide information about parking, security, and/or building entry arrangements.	App poli org;
Prepare desk/workspace, including any necessary office supplies and hardware/software.	Sch
Provide necessary account logins, email addresses, network registrations, etc.	
ORGANIZATION RESPONSIBILITIES: ON/AFTER START DATE	
Greet employee, conduct tour of office/building/grounds.	Est
Walk through software/hardware setup and login.	Pro bac
Arrange welcome meetings with colleagues and supervisors.	Brie
Provide informational/training materials.	Info trai
Facilitate orientation session(s) and job shadowing, if applicable.	Sch leac
Acquaint employee with human resources staff and other key resources.	Cor ther

Enroll employee in benefits/incentive programs, or facilitate enrollment.	
Provide job description, roles and responsibilities, company policies, lunch and break policies, holiday schedule, performance review guidelines, training and professional development information, and emergency/inclement weather plans and policies.	
<b>EMPLOYEE RESPONSIBILITIES</b>	
Complete all new hire/enrollment paperwork by due date.	Cor
Complete all training, professional development, orientation activities, and assignments by due date.	Set
Schedule any required meetings within proper time frame.	Det
Set up and log into all necessary accounts, email addresses, networks, and hardware/software.	Det dev
Obtain any necessary parking/building access codes, badges, tags, and/or permissions.	Sch
	See
	See or p

<b>ORGANIZATIONAL</b>	
<b>FIRST YEAR</b>	
1	1
2	2
3	3
4	4
5	5
<b>LONG-TERM</b>	
1	1
2	2
3	3

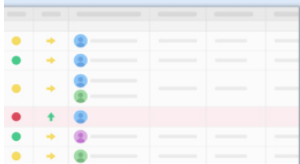
4		4
5		5
<b>PROFESSIONAL DEVELOPMENT GOALS</b>		
1		1
2		2
3		3
4		4
5		5
<b>POTENTIAL ISSUES TO ADDRESS</b>		
1		1
2		2
3		3
4		4
5		5

<b>PROGRESS MONITORING AND</b>
<i>How will action plans and progress be communicated to organization leaders/stakeholders?</i>
<i>How will executive be evaluated on progress and achievement of goals?</i>
<i>What are the standards for successful implementation of action plans?</i>
<i>What are the standards for achievement of professional development goals?</i>

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Task List



Project Board



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## Executive Onboarding vs. EXECUTIVE ONBOARDING

### EXECUTIVE ONBOARDING

#### ABOUT ONBOARDING

Executive onboarding takes orientation a step further. Not only is the executive introduced to management and staff and acquainted with the organization's history, culture, policies, processes, and goals—they are also trained on their specific role. This may include assistance on forming strong working relationships, making key decisions, and/or implementing new ideas. It typically involves meetings with colleagues, subordinates, and/or company leaders, as well as training and informational sessions.

#### ONBOARDING SNAPSHOT

Executive onboarding is a long-term, ongoing process for new executive hires and internal promotions.

Executive onboarding takes place before and during the executive's first days of work and into their first year.

Executive onboarding informs executives on the organization's long-term mission, goals, strategies, and needs.

Executive onboarding offers training and guidance for the executive's specific role.

#### ONBOARDING: GOALS AND OUTCOMES

**Short-term (within first few days):** Executive has completed orientation, submitted all new hire and enrollment paperwork, and been acquainted with the organization's background and mission. Executive's first-year onboarding plan, activities, goals, and outcomes are determined.

long-term (within first year): Executive has completed onboarding plan and activities and has achieved established goals and outcomes. Executive is participating in daily operations, is working effectively with staff, has been successfully evaluated by supervisors and/or stakeholders, and has established professional development goals for following year(s).

## ROLES AND RESPONSIBILITIES

### NEW EXECUTIVE ONBOARDING

#### ORGANIZATION RESPONSIBILITIES: ON/BEFORE START DATE

Provide new hire forms, benefits enrollment paperwork, parking and building access code, badges or passes, and email, account, and network login information to executive.

Provide names, job titles, and background information on team members, organization leaders, and key stakeholders.

Prepare office/workspace, including necessary office supplies and software/hardware.

Assign executive mentor/coach to answer questions, guide executive through proper policies and procedures, address potential issues, and help executive achieve organizational and professional development goals.

Schedule welcome meetings with colleagues and organization leaders/stakeholders.

#### ORGANIZATION RESPONSIBILITIES: AFTER START DATE

Establish guidelines for relationship between board/stakeholders and executive.

Provide information about organizational goals, history, culture, structure, financial background, policies, and processes.

Brief executive on top issues that need attention in the first year.

Inform executive of roles and responsibilities of the position, schedule any necessary training and professional development sessions.

Schedule check-in meetings throughout the first year with executive and organization leaders to gauge progress, address potential issues, and exchange feedback.

Conduct regular meetings with board/stakeholders throughout the first year to update them on the executive's progress and address potential issues.

**EXECUTIVE RESPONSIBILITIES**

Complete all necessary forms, paperwork, and enrollments.

Set up and log into all required accounts, email, networks, and software/hardware.

Determine and establish action plan to achieve near-term organizational goals.

Determine and establish action plan to achieve long-term organizational and professional development goals.

Schedule any necessary meetings with team, colleagues, and leaders/stakeholders.

Seek networking opportunities and resources.

Seek guidance from mentor, organization leaders, and/or stakeholders regarding current potential problems.

**GOALS**

**ACTION PLAN**

**ACTION PLAN**

**ACTION PLAN**

**TIMELINE/RESOURCES NEEDED TO RESOLVE**

**ACCOUNTABILITY**

**Who is responsible for this?**

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