

New Leader Onboarding Tool #1 Meeting With Your New Manager

- What would I need to accomplish in the next 3 months/6 months for you to feel that I was doing a great job?
- How does this work impact franchise owners or clients/members?
- Why are we doing this? What is the specific business ROI we are trying to achieve?
- What is the timeline to deliver and what specific resources are needed?
- Which other department or personnel will be needed for input or collaboration on this work?
- In your view, what problem in my area carries the highest priority?
- What is the number one priority in the next 3 months? 6 months?
- How will I know if my performance displeases or pleases you?
- How do you like to be kept informed on the status of key projects or initiatives?
- What is the best way to contact you for questions, phone/email?
- Do have any topics about which you feel strongly, that I should know about?

New Leader Onboarding Tool #2

Meeting With Your New Team Members (Direct Reports)

Objectives:

Introduce yourself to your team and learn preliminary information about the team from their perspective.

Introduce Yourself:

- Include your background and work history
- Some personal information: where you live, family, pets, hobbies
- What you're looking forward to in this new role

Preliminary Information about the Team:

Ask:

- What is most challenging about the work at this time?
- What did you like best about your former leader – what should I try to continue?
- How often did you meet? One-on-ones? Staff meetings? What worked or didn't work about these sessions?
- What do you hope that this team *becomes*? To your clients? To each other?
- What questions haven't I asked you?

Setting Expectations:

Ask the team to brainstorm their expectations of you (after you leave the room). Give them 30 minutes to come up with their expectations on a flipchart around the following categories:

- Communication
- Development
- Feedback
- Setting Goals and Standards
- Problem-solving
- Managing Conflict
- Other

While they brainstorm (without you), jot down your expectations of them within the same categories (add others if necessary). After 30 minutes, come back together and discuss.

New Leader Onboarding Tool #3

Meeting With Your Direct Reports

Prework:

Send these questions to your team a few days prior to your in-person meeting so they can prepare thoughtful answers.

- Tell me about your current job. What do you find most satisfying, challenging and frustrating about your current role?
- What are your key areas of focus or priority?
- What do you consider your greatest accomplishments or areas of contribution?
- What are the greatest barriers you face in performing your job?
- What are your concerns about the department and about me?
- What could I do that would be helpful to you in your job?

New Leader Onboarding Tool #4 Meeting With Your Peers and Colleagues

- Tell me about your area: comment on your key strategies, clients, financial results, people and your biggest challenges.

- What are your current most critical three to four priorities?

- What have been your past experiences with and impressions of the area that I am now managing? What is working well, and what is not working well?

- What advice would you give to someone who is new to this position/role?

- Do you have any concerns or issues with the products or services provided by the area I am leading?

**As appropriate, schedule continuing one on one meetings monthly/as needed.*