# Manager Onboarding Checklist

Congrats! You have completed your interview process for a new Synergy developer and received a verbal “Yes!” from your candidate. Now what? Onboarding is a very important process for a new hire. It sets the tone for what working for your company will be like. If you want to increase your retention rates for new hires, we highly recommend developing a structured onboarding program.

This checklist is meant to be a guide for the hiring manager to follow after having a candidate verbally accept an offer of employment. It is largely based on what we do at Synergex for our new hires, but we’ve sprinkled in a few extras specific to a Synergy developer new hire. Don’t forget that we also have a sample 90-day onboarding plan for the new hire available in our free education library.

Please feel free to alter this template in any way you need to meet your team’s requirements.

Employee Name: Title:

Reports to: State date:

## Two weeks prior to start date

Onboarding is a team effort – these items will likely be completed by the hiring manager, office manager, HR, or IT at your organization.

[ ]  Confirm that offer letter was sent and signed (confirm start date and salary).

**Pro tip** – Ideally the start date should be on a Wednesday or Thursday (Monday’s are typically the worst day to start a new employee because of the potential for needing to deal with any “fires” that happened over the weekend.

[ ]  Confirm that background and reference checks were completed.

[ ]  Send email to new hire communicating details of their first day, including when to arrive and what to bring. (Send no more than one business day after signed offer letter.) Consider including the following:

* Confirmation of start date and time
* Agenda for first day, including lunch plans
* Dress code

[ ]  Notify IT. Provide name, start date, and specific hardware/software needs including the latest versions of Visual Studio, Synergy DBL, and Synergy DBL Integration for Visual Studio.

[ ]  Set up email address and phone number.

[ ]  Add permissions or grant access to appropriate shared folders, email distribution lists, etc.

[ ]  Order business cards.

[ ]  Plan welcome gift.

[ ]  Schedule new hire orientation.

[ ]  Schedule check-ins with your broader team to get introduced and connect on joint initiatives.

[ ]  Schedule check-ins with leadership and cross-functional partners to touch base and say welcome.

[ ]  Schedule benefits enrollment meeting.

[ ]  Schedule new hire photo (at Synergex we provide semi-professional headshots for employees).

## One week prior to start date

You’ll want to have everything organized ahead of time to ensure a smooth first day for your new hire.

[ ]  Add to anniversary and birthday lists (Synergex’s HR department recognizes work anniversaries each year with an announcement in Teams and we acknowledge both birthdays and work anniversaries in our internal monthly business reports).

[ ]  Add to org chart and print copy for workstation.

[ ]  Create welcome signs.

[ ]  Schedule a team welcome lunch.

[ ]  Develop 90-day plan (you can [check out our template here](https://www.synergex.com/education-resources/90-Day-New-Hire-Onboarding-Plan.docx)).

[ ]  Contact Synergex to register your new hire for [Synergy DBL Language Essentials](https://www.synergex.com/language-essentials/).

[ ]  Prepare first day agenda.

[ ]  Prepare new hire HR packet.

[ ]  Confirm that IT has required tools and equipment ready (keyboard, mouse, monitor if applicable).

[ ]  Add to company calendar and relevant recurring or company meetings.

[ ]  Grant access to tools and systems (passcodes and/or accounts).

**Pro Tip** — Whether this action falls into your court or HR’s, be sure to be thinking about integral tools early on. System access can take time, and you want to ensure early access so your new hire feels productive on day one.

[ ]  Send internal announcement after their email account has been set up, so new employee sees it on first day.

[ ]  Route welcome card to be signed by executives and hiring manager.

## Day before

[ ]  Add to phone list and print a copy (including the new employee) for their desk.

[ ]  Set up work environment (including swag, if applicable – new hires love sporting new company gear).

[ ]  Obtain badge for building and office access (if applicable).

[ ]  Add name plate to workstation.

## First day

A first day on the job is like any other first meeting – first impressions matter! By taking the time to go through the following, you’ll lay a strong foundation for a great chapter with your team. Be friendly, organized, and efficient in your schedule – get started with the below.

[ ]  Collect employee contact information (address, cell, in case of emergency contact info).

[ ]  Ensure that new hire has any HR-related paperwork they will need to complete.

[ ]  Conduct new hire office tour and employee/team introductions.

**Pro Tip** — As you tour with your new hire, be sure to make introductions in person. It’s always easier to draw connections in real life versus email — creating community is key to retention!

[ ]  Host your first check-in to go over:

[ ]  Their 90-day plan

[ ]  Their role and key responsibilities

[ ]  Typical expectations about work hours, procedures for overtime, use of flexible work policies, vacation, and sick leave

[ ]  How to log time and attendance for hourly workers (if applicable)

[ ]  Scheduling procedures and timelines (how to request change in schedule or shifts)

[ ]  Note who to contact for repairs or IT support.

[ ]  Arrange training dates for any new or unfamiliar technologies.

[ ]  Schedule 30-Day check-in session.

[ ]  Consider assigning a buddy.

[ ]  Get to know new hire (interests, hobbies, etc.) during welcome lunch.

## First week

[ ]  Conduct new hire orientation with more information about company:

 [ ]  Organizational culture

[ ]  Values, mission, and vision

[ ]  Company history

[ ]  Review expense policy.

[ ]  Ensure that new hire has submitted paperwork to HR point of contact.

## First 30 days check-in

[ ]  Review and record what’s working well and what’s not working well or needs attention.

[ ]  Ensure employee has all necessary equipment, tools, or resources required.

[ ]  Solicit feedback from relevant managers and colleagues.

[ ]  Solicit feedback on their onboarding experience, including what went well and what could use more attention (and use for future onboarding).

[ ]  Schedule 90-day check-in meeting.

## First 90 days check-in

[ ]  Prior to the meeting, consider the following:

* Are tasks completed on time and of quality?
* What needs improvement and areas of opportunity to help enhance the employee’s performance
* Feedback from other employees and peers

[ ]  Highlight what’s going well (e.g., tease out a project that they’ve contributed to and discuss their success).

[ ]  Deliver positive feedback you’ve heard from others.

[ ]  Ask what they’ve enjoyed working on and weave it into their next 90 days.

[ ]  Provide an overview of the next 90 days (or other review period).