**Senior Leader Pre-boarding:**

* Provide the executive with:
  + Bios, resumes, org charts, assessment data or team reports for direct reports.
  + Required applications and forms (e.g., benefits, employee manual ethics information, travel card application)
* Work with IT and Facilities to coordinate work space so the executive has an appropriate parking space, office, equipment, identification, PDA/Blackberry, computer, etc.
* Order business cards.
* Pre-populate the executive’s calendar with onboarding meetings and conference calls (e.g., meetings with mentor/sponsor/coach, lunch with senior leaders, standard conference calls).
* Create a list of key stakeholders and executives with name, title, phone number and email address. Provide to the executive on the first day.
* Assign an executive sponsor.
* Assign a mentor.
* Assign a coach to help the executive progress in his or her current position, as well as with individual development and career goals.
* Develop a briefing book or website with:
  + Key information about the department (e.g., structure and mission, background, financial information)
  + Organizational chart and employee contact information
  + Photos and bios of key executives
  + List of acronyms
  + Required training information
  + List of recurring meetings
  + Maps and building information
  + Payroll calendar
* Obtain items with the company logo or brand to give on the first day as welcome gifts

– This is a nice touch to say we are glad you are here and you are a part of our team.

* Executive should provide direct reports and staff with a bio, photo and a letter of introduction.

**Week 1:**

* Create and review a 30-60-90 day plan and present to executive. Include expectations and milestones.
* Schedule meetings with company executives in key departments (i.e. legal, marketing, finance, HR, IT)
* Introduce the executive to direct reports, staff, senior leaders, etc.
* Conduct an executive briefing, transition meeting or other forum to provide the executive with information about his/her team. The briefing should include: a quick introduction to personnel policies and rules (financial “dos and don’ts”, acquisitions, hiring, firing)
* Training and information designed to provide initial familiarity with crucial systems and procedures. Introduce the executive to his or her assigned mentor and sponsor.
* Executive should review the list of key contacts and stakeholders and begin to schedule introductory calls/meetings.
* Meet with executive to ensure job roles and responsibilities are clearly communicated.
* Take the executive to lunch.
* Executive should meet with direct reports and staff in-person or via conference calls.
* Executive should create an action plan. This can take the form of a set of strategic questions an executive should ask and get the answers to over time, in order to better understand his/her department.

**First 30 days:**

* Conduct a Jump Start meeting including direct reports to assimilate the new leader to his/her team.
* Finalize the executive’s performance objectives.
* Executive should create an Executive Development Plan (EDP) with his or her manager and solicit input from coach/mentor.
* Executive should schedule a formal feedback session with his or her manager and coach/mentor.
* Facilitate networking opportunities and provide resources to make networking possible.
* Discuss with the executive his or her individual work styles and preferences.
* Executive should meet with his or her coach.
* Executive should seek out unwritten rules (e.g., how to get things done; who can help and who can’t or won’t; what to do and, more importantly, what not to do) with mentor, sponsor and peers.
* Contact the executive to get feedback on his or her experience after 30 days.

**First 90 days**

* Executive should identify professional development opportunities.
* Executive should develop an action plan.
* Executive should review performance objectives with his or her manager.
* Provide the executive with the resources, tools and time to successfully accomplish tasks in this phase.
* Contact the executive to get feedback on his or her experience after 90 days.

**6 to 9 months**

* Executive should engage in a leadership assessment process for developmental purposes and to identify areas for improvement; follow up with coaching and/or an action plan if appropriate.
* Executive should schedule a formal feedback session with his or her manager.
* Executive should reflect on his or her role with coach/mentor.
* Executive should revisit the EDP to assess professional development goals and track progress.
* Provide the executive with the resources, tools and time to successfully accomplish tasks in this phase.
* Contact the executive to get feedback on his or her experience after 6 months.

**1 Year**

* Executive should revisit the EDP to assess professional development goals and track progress.
* Contact the executive to get feedback on his or her experience after 6 months.
* Executive should complete a 360° assessment (or other leadership assessment process) in addition to the annual performance appraisal.
* Executive should develop a roadmap for long-term success.
* Contact the executive to get feedback on his or her experience after 1 year.