

HR

How To Onboard A New Manager

Requirements & Best Practices

The onboarding process for a new manager is different than an average employee. Learn more about the correct steps, forms & methods for a smooth transition.

A screenshot of the 'Onboard' HR system interface. The interface has a dark sidebar with icons for People, Portals, Forms, E-Verify, and More. The main content area shows a table of new hires with columns for Portal, Full Name, Position Title, Start Date, Manager, Onboard Tasks, Task Progress, and Overdue Tasks. The table lists 15 employees with their respective details. At the bottom right, there is a pagination bar showing '1 - 50 of 1002 items' and a dropdown for 'Items per page' set to 50.

PORTAL	FULL NAME	POSITION TITLE	START DATE	MANAGER	ONBOARD TASKS	TASK PROGRESS	OVERDUE TASKS
	Audli Marks	Server (WW)	06/06/2016	Hanan Erickson	7	84%	1
	Aashir Sims	Host/Hostess	06/06/2016	Martyna Burnett	4	50%	2
	Auriz Watson	Bar/ender	03/19/2017	Alan Albert	5	80%	1
	Aaron Gomez	Server (WW)	05/23/2015	Joana McLeod	9	89%	1
	Abbi Peralta	Host/Hostess	08/09/2017	Alan Albert	9	89%	1
	Abbie Livingston	Busser	04/07/2015	Ishiko Franco	9	89%	1
	Abdur Kolley	Prep	01/25/2018	Hanan Erickson	9	89%	1
	Abdur-Rahman M.	Prep	10/26/2016	Alan Albert	7	84%	1
	Abi Finnegan	Server (WW)	03/31/2016	Abdur-Rahman M.	9	89%	1
	Abigail Ireland	Host/Hostess	09/11/2018	Kiki Lindhay	10	60%	4
	Acacia Leal	Cook	02/03/2015	Abdur-Rahman M.	7	84%	1
	Ada Travers	Prep	11/25/2017	Abdur-Rahman M.	5	60%	2

Plan for Long-Term Success

Six Best Practices to Successfully Onboard Managers

Employee onboarding is an extremely important process, not only to get new hires in the door, but to inform and engage them and make sure they are as productive as possible on day one.

The same is true for onboarding management-level employees, yet there are other factors to consider that go “above and beyond” standard onboarding processes.

This is especially true when you consider that new managers will quickly be expected to lead teams and focus on achieving mission-critical goals.

To learn how to do this—and what mistakes to avoid—follow our six best practices for onboarding managers.



Proven Strategies for Effective Manager Onboarding

When thinking about onboarding managers, it's important to start with a baseline approach that is consistent with your standard process for bringing individual contributors into the company.

Yet by definition, managers are also strategic team leaders, and, depending on their specific position, may even serve as a high-profile spokesperson for the entire company.

This means that onboarding managers must include a number of extra steps to make sure the relationship truly gets started on the right foot.

To help, we've listed six recommendations to onboard managers and make the entire process as efficient—and as effective—as possible.



1 Give them the right tools for success

There's no better time than the first day to give managers all of the tools they'll need in their new job. This includes badges, laptops, telephones, employee and manager handbooks, and more. It sends the right message when all of these are ready and given to the manager before they even leave the HR office.

2 Establish clear goals and objectives

As managers come on board, they need to be aware of their own goals as well as the objectives of the team they'll be managing. Effective onboarding will also review past progress on team goals, and even give the new managers a chance to ask related questions. This may also be a good time to cover other details such as internal processes, reporting workflows and deadlines, preferred reporting formats, and other similar information.

3 Set up one-on-one meetings

It is also important to introduce the new manager to the overall team as quickly as possible. Even if the newly hired manager has the best of intentions, this responsibility should ultimately fall to HR (or possibly the hiring manager). This helps make sure that initial one-on-one meetings are scheduled with each member of the team—and sends the message that the company has already “thought of it all.”

It is also beneficial to schedule a follow-up meeting between the manager and HR after these first meetings take place. This is a good time to allow new managers to express initial observations about direct reports or ask deeper questions.

4

Create mentorship opportunities

While we have already highlighted some key differences between onboarding an individual contributor as opposed to a manager, the following recommendation is important. As a best practice, there should be a [dedicated HR mentor](#) assigned to the new manager.

This assignment may last a few weeks or even longer, but it gives managers the chance to ask detailed questions and learn much more. This eliminates the common challenge related to bringing new managers on board and then leaving them alone, assuming “they’ll figure it all out.”

5

Use milestones to get started early, and stay on track

Don’t lose valuable time by delaying manager onboarding. Consider that this effort is important enough that you shouldn’t put it off to normal weekly (or longer) onboarding sessions.

In addition, you should create a plan of action for the first several months of a new manager’s employment in the organization. This should include setting up milestones that they must achieve in order to stay on track and become an effective leader.

One of the best ways to do this is through the use of milestone evaluations, which can be done by the mentor assigned to the new manager. Not to be confused with annual performance appraisals, this is a great way to gauge how the new manager is doing in terms of assimilating into the company culture and understanding the overall goals. At the same time, it can be a great way to conduct early career development and offer initial guidance.

6

Schedule training and product demos

Like any other new employee, newly hired managers are not familiar with corporate processes, systems, software applications, and other internal tools they will need to conduct “business as usual” in the new company.

During the [onboarding process](#), HR should also schedule any additional training the new manager must have to succeed in their role. This should also include an in-depth overview of the company’s products or services. Many companies make the mistake of asking new employees to review manuals or start using the product. A better approach is to give new hires access to those departments that are responsible for product development, training, or operations.



Improve Manager Onboarding with HR Cloud

HR Cloud helps organizations automate, streamline, and simplify every step required to bring any new employee into your company and get them up and running quickly. The same is true when it comes to managers. Our comprehensive [Onboard](#) solution delivers all the tools needed to transform routine onboarding exercises into engaging new experiences.

With automated workflows, checklists, customization options, personalized portals, and more, Onboard will help you save time while making sure nothing is overlooked. New managers will walk away impressed and confident they picked the right company to work for. Even better, they'll have all the tools and information they need to jump in and make a difference right from the start.



About HR Cloud

[HR Cloud](#) is a leading developer of HR software and HRMS solutions for business with a focus on effective employee engagement. HR Cloud empowers teams to easily onboard new hires, manage employee data, create a company social network and support employee development.

HR Cloud is a modern and powerful cloud-based HRMS solution with a complete suite of HR functionality, including core, performance, onboarding, recruitment, absence management, and time and attendance.

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Unleashing Human Resourcefulness

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