

### New Leader Onboarding Tool #1

#### Meeting With Your New Manager

- What would I need to accomplish in the next 3months/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

#### **Prewrite:**

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.*