

Executive Onboarding Program

Helping Executives Make Rapid Transitions



Supervisor's Checklist For

(Name of Employee)

Department of the Air Force

(Name of Unit)

Entrance on Duty:

(Date)

Executive Onboarding Program Framework for the Federal Government

Executive onboarding is a way of acquiring, accommodating, assimilating and accelerating new leaders into the organizational culture and business. Documented examples show that onboarding of leaders minimizes the chances of costly replacements and terminations by helping newly-placed executives navigate the areas that are most critical to success. The best approaches recognize that a successful onboarding process involves process owners, process champions and new executives.

Process Owners (e.g., Human Resources, Executive Resources)

- Serve as a bridge between the recruiting phase and the onboarding phase;
- Ensure appropriate feedback mechanisms are in place for all involved in the process;
- Assess the need for additional organizational support/resources (e.g., IT, facilities);
- Are prepared to address issues of diversity (diversity is a broader concept than ethnicity, race, gender and age; it also includes disability, religion, nationality, and sexual orientation); and
- Partner with the manager and executive to focus the executive's transition efforts in the most productive directions.

Process Champions (e.g., senior leaders, managers, supervisors, mentors, coaches)

- Provide explicit encouragement for new executives to take time to learn, build relationships, and set the stage for performance;
- Are accountable for seeing that the strategy and process are accomplished;
- Ensure expectations are clear and provide regular and constructive feedback;
- Consider diversity in all aspects of onboarding;
- Assist the new executive with integration into his or her peer group; and
- Explain and set realistic milestones and cultural expectations (e.g., decisions that can be made without manager approval, communication styles).

New Executives

- Actively learn about the organization's history, values, vision and mission, strategic plans, leadership structure, metrics and performance, processes and practices;
- Take responsibility for ensuring integration is accomplished effectively by achieving the measurements for success that have been put in place, absorbing critical information, and building valuable relationships; and
- Regularly communicate expectations, objectives and accomplishments

The following chart provides an overview of **Key Onboarding Goals**. While all executives are expected to continually learn, build relationships, deliver results and constantly monitor performance and individual development, the time periods identified in this chart simply illustrate when those objectives should be emphasized during the onboarding process.

Goals	Pre-Boarding	Day 1/ Week 1	30 Days	90 Days	6 Months	1 Year
1. Plan and prepare for the executive's arrival and ensure the executive's successful entrance into the organization	→					
2. Ensure the executive is welcomed into the organization by senior leadership and new staff and is satisfactorily in-processed. The remainder of the week should be dedicated to deliberate introduction and acclimation of the executive into the organization as well as training to help the executive understand pitfalls and critical issues.	→					
3. Establish roles and responsibilities of the new executive as they relate to performance, development and ethical behavior. Executives should also begin to build relationships and business partnerships.	→					
4. Cultivate the new executive by building competence in the job and providing frequent opportunities for open forum discussions. Executives should begin to have a full workload while managers monitor performance and provide early feedback.	→					
5. Provide guidance and feedback to the executive to ensure continued success and to make plans for his or her future with the organization.	→					
6. Monitor performance, individual development, goals and desires and engage the executive in advancing the mission of the organization.	→					

Onboarding Priorities – Before the First Day

Prepare: Establish initial inroads toward early and open dialogue and ensure the executive’s successful Entrance on Duty

	Task	Complete
BEFORE FIRST DAY	Provide the executive with: <ul style="list-style-type: none"> ▪ Bios and resumes of direct reports ▪ Required applications and forms 	
	Work with security to ensure timely clearance processing.	
	Work with IT and Facilities to coordinate work space so the executive has an appropriate parking space, office, equipment, identification, PDA/Blackberry, etc.	
	Order nameplates, flags and business cards.	
	Pre-populate the executive’s calendar with tasks in the framework as well as other essential activities and training. This will demonstrate leadership support for the strategic onboarding of the executive as well as help ensure the executive takes the necessary time to complete the specific tasks (e.g., meetings with sponsor/supervisor/others, lunch with senior leaders, formal feedback sessions).	
	Create a list of key stakeholders and agency leaders with name, title, phone number and email address. Provide to the executive on the first day.	
	Assign an executive sponsor. A sponsor accelerates the new executive’s ability to quickly address and properly deal with early confusing issues. Questions about “normal protocol” in the organization, finding the right people to go to for information, correct procedures, and learning what is “right” and “wrong” should be easily answered by a sponsor. Be sure the sponsor knows his or her responsibilities.	
	Develop a briefing book or website with: <ul style="list-style-type: none"> ▪ Key information about the agency (e.g., structure and mission, background, financial information) ▪ Organizational chart and phone book ▪ Photos and bios of key executives ▪ List of acronyms ▪ Message from the Director/Head of Agency ▪ Benefits, work life programs, transit subsidy information ▪ Required training information ▪ List of recurring meetings ▪ Maps and building information ▪ Payroll calendar ▪ Information of personal interest (e.g., information packet on local schools and realtors) 	
	Obtain items with the agency logo or brand to give on the first day as welcome gifts – a nice touch say we are glad you are here and you are a part of our team.	
	Schedule mandatory training (e.g., IT Security, Ethics, No Fear Act, etc).	
	Executive should provide direct reports and staff with a bio, photo and a letter of introduction.	

Onboarding Priorities – First Day/Week

PREPARE: Ensure executives are welcomed into the organization by senior leadership and new staff, and satisfactorily “in-processed”

	Task	Complete
FIRST DAY/WEEK 1	Introduce the executive to direct reports, staff, senior leaders, etc.	
	Executive should complete any paperwork and security requirements that were not completed during the pre-boarding phase.	
	Conduct an executive briefing, transition meeting or other forum to provide the executive with information about the work group. The briefing should include: <ul style="list-style-type: none"> ▪ The 12-month calendar and a letter from the previous executive to gain a perspective on organizational history, culture, priorities and “lessons learned” ▪ Fact sheets on the “hot issues” that will require the executive’s attention within the first 90 days ▪ A quick introduction to personnel policies and rules (financial “dos and don’ts”, acquisitions, hiring, firing, contractor support) ▪ A discussion of initial projects and roles and responsibilities, including past performance standards ▪ Training and information designed to provide initial familiarity with crucial systems and procedures. These are crash courses but will serve their purpose by making executives aware immediately of vital systems, laws, procedures, etc. 	
	Introduce the executive to his or her assigned 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 attend any necessary training as described in the pre-boarding phase.	
	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 the agency and his or her role in contributing to the organization. (See Appendix A for a list of sample strategic questions.)	
Provide the executive with the resources, tools and time to successfully accomplish tasks in this phase.		

Onboarding Priorities – First Thirty Days

ENABLE: Establish roles and responsibilities of the new executive as it relates to performance, development and ethical behavior while building relationships and business partnerships

	Task	Complete
FIRST THIRTY DAYS	Finalize the executive’s performance objectives.	
	Executive should create an Executive Development Plan (EDP).	
	Executive should schedule a formal feedback session with his or her supervisor.	
	Facilitate networking opportunities and provide resources to make networking possible.	
	Discuss with the executive his or her individual work styles and preferences.	
	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—this could be included in the risk assessment initiated in week.	
	Executive should begin scheduling appointments with key stakeholders from other organizations (e.g., programs, policies and budget). Executive should consult with Unit POC or Supervisor to confirm stakeholders.	
	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 30 days.	

Onboarding Priorities – First Ninety Days

SUPPORT: Cultivate new executive by fostering organizational relationships, detailing internal processes and providing frequent opportunities for open forum discussions

	Task	Complete
FIRST NINETY DAYS	Executive should identify professional development opportunities.	
	Executive should develop an action plan based on answers to the strategic questions provided in Week 1.	
	Executive should review performance objectives with you.	
	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.	

APPENDIX A

SAMPLE STRATEGIC QUESTIONS

Below is a sample set of questions executives should ask and get answers for to better understand the agency and their role in contributing to the organization. The process of asking and ultimately answering these questions should enable the executive to quickly understand the organization and perform basic job functions; know the correct individuals or departments who can provide assistance and answer questions; perform job tasks in compliance with agency and Government policies; and access key information about leadership resources and development opportunities. *Note: The number of questions is not important, but the substance and relevance of the questions to the success of the executive is important.*

Questions leaders need to:

Ask themselves and/or their mentor	Ask other leaders	Ask manager and/or key stakeholders	Ask direct reports	Ask others in order to access information about available training resources
What is the agency vision and mission?	What are the 3 things we should be very proud of as an organization, and why?	Who are our customers?	What is a recent management decision you did not understand?	How can I advance in the organization?
How are my goals and objectives tied to the vision?	What are the unspoken norms?	Why do customers do business with us?	What does the leadership team do that gets in the way of you doing your job?	How do I request training?
What does the end state look like?	Where do the great ideas come from in your organization?	How and when have we made it hard for them to do business with us?	How can we communicate management decisions more effectively?	How do I register for training?
What is the state of the talent within my group?	How is personal success measured?	What do our customers need from us now?	How do you feel at the start of the workweek?	How and when can I initiate a leadership assessment process?
What are the organization norms regarding dress and appearance?	How do you encourage others to communicate the “core values”?	What will our customers need from us in the future?	How do you feel at the end of the workweek?	Which organizations provide professional development opportunities for

What are the organization norms regarding punctuality?	How do you help a new employee understand the culture of the organization?	What gets in the way of us doing our job?	What are the key metrics to track progress and success?	With whom should I discuss development opportunities?
What is the process for requesting and documenting leave?	When faced with two equally qualified candidates how do you determine whom to hire?	What are the expectations for my role as a leader?	What are the short term priorities?	How do I find out about required training?
Are there any quick wins?	How do I locate information about agency departments and offices?	How is departmental success measured?	What tools are used to manage schedules (appointments)-paper, outlook?	How can I access available leadership training resources?
What support do I need to achieve success for my organization?	What is one mistake you witness leaders making more frequently than others?	What are the organizational taboos?	What is my role in emergency evacuation?	Where can I find recommended reading materials?
Where can I go to find the most recent Employee Viewpoint Survey (or other employee opinion survey) results for my organization?	What is the one behavior or trait you have seen derail more leaders' careers?	What are some of the challenges that previous incumbents in this position have encountered?	Where is the alternate operating location?	When and where is the next SES Orientation Briefing? How do I register?
What is my role in COOP?	Why do people stay in this organization?	Where can I find information about the current administration's priorities?	What process is used to collect our customers' needs and measure their satisfaction?	Are there any organizational leadership tools I should be aware of?
What strategic relationships and internal networks should I be aware of?	What motivates senior management?	What key policies should I be aware of in the first month and which ones do I own?	What are the short term priorities for the organization and my office?	What are a few resources you would recommend to someone looking to gain insight into becoming a better leader?
What do I want to be remembered for?	What are the organizational norms about travel (not the GSA/official rules)?	Who are my key partners and what do they do/provide?	What are the results of the most recent third-party inspection (IG, GAO, etc.)?	What are you doing to ensure you continue to learn and grow as a leader?

What are the major risks associated with my position-to me, to my organization?	In my first twelve months, what can I do to help you and your staff be successful?	What are the results of the most recent employee morale survey?	What are 3 capabilities we have that are under-developed or under-utilized and what should we do about that?	What is one characteristic you believe every leader should possess?
How does the work I do contribute to the overall success of the organization?	Who are the "power players"?	What is the current and future year budget outlook?	What are the three things you would change around here and why?	What skills do I need to be most effective?
What is the organization's commitment to telework and other work-life programs?	What is one thing you would change about the organization?	Which congressional committees are concerned with the organization's mission and funding?	What is the most pressing issue for me to address with our customers?	When should I complete my Executive Development Plan (EDP)?