Corporate Senior Executive Management Office
Executive Onboarding Checklist

Executive Onboarding is a way of acquiring, accommodating, assimilating and accelerating new leaders into the organizational culture and business. To help make new Executives feel welcome and comfortable in their new surroundings and to minimize the time before the Executives are productive in their agency, organization and new position, the following actions should occur in the stated timeframe.

PRE-BOARD The goal of the pre-boarding phase is to plan and prepare for the Executive's arrival and to ensure the Executive's successful entrance into the organization.	ROLE & RESPONSIBILITY
☐ Verify names of Executives who will EOD Monday with Operations Division. Review Staffing Reports (i.e., Status of Cases, E&SP Management Reports) by preceeding Wednesday and Friday.	☐ Exec Development ☐ Staffing
☐ Prepare Welcome Letters and obtain DAS signature	☐ Exec Development
☐ Obtain pens and stationary for Career Executives	☐ Exec Development
☐ Notify DAS of Executives that will EOD on Monday	☐ Benefits
☐ Notify Organization (i.e., ODI) of participants that will EOD by Thursday preceeding. Confirm participants by Friday.	☐ Exec Development
☐ ✒ Work with IT and Facilities to coordinate work space so the Executive has an appropriate parking space, office, equipment, identification, PDA/Blackberry, etc	☐ Gaining Organization
☐ ✒ Work with security to ensure timely clearance processing	☐ Gaining Organization
☐ ✒ Order nameplates, flags and business cards; pre-populate the Executive's calendar	☐ Gaining Organization ☐ Staffing (flags)
☐ ✒ 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	☐ Gaining Organization
☐ **Assign a mentor to help immerse the Executive into the culture of the organization**	☐ **Exec Development**

☐ 📖 Develop a briefing book or website with:
   o Key information about the agency (e.g. structure and mission, background, financial information)
   o Organizational chart and phone book
   o Photos and bios of key Executives
   o List of acronyms
   o Message from the Director/Head of Agency
   o Benefits, work life programs, transit subsidy
   o Mandatory and required training
   o List of recurring meetings
   o Maps and building information
   o Payroll calendar
   o Information of personal interest (e.g., information packet on local schools and realtors)
	☐ CSEMO

☐ 📖 Obtain items with the agency logo or brand to give on the first day as welcome gifts – a nice touch to say we are glad you are here and you are a part of our team	☐ Exec Development
☐ 📖 Schedule mandatory training (e.g. IT Security, Ethics, No Fear Act, Performance management, employee and labor relations, Hatch Act, EEO, Diversity Awareness)	☐ Exec Development

☐ 📖 Provide the Executive with:
   o Bios and resumes of direct reports and staff
   o Information about agency performance systems and travel cards
   o A position description
	☐ Organization
	☐ Staffing
	☐ Benefits

☐ Encourage the Executive to review and complete necessary processing and EOD documents before the first employment day	☐ Staffing
☐ Develop the Appointment and Welcome Letters to note the arrival of the Executive	☐ Staffing

DAY 1/WEEK 1	ROLE & RESPONSIBILITY
The goal of the first day is to ensure the Executive is welcomed into the organization by senior leadership, 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.	
☐ Welcome the Executive to VA at In processing Session	☐ Staffing
☐ Attended CSEMO Executive Onboarding Briefing. This briefing provides an overview of CSEMO's role in managing the lifecycle for Senior Executives. Presentations include:	☐ Staffing ☐ CSEMO DAS ☐ Benefits

o   Completion of In Processing
    o   Overview of Benefits and Entitlement
    o   Welcome from CSEMO DAS
    o   Welcome from Office of Diversity and Inclusion
    o   Executive Training and Development for the next 18 months
	☐ ODI
	☐ Exec Development

☐ Introduce the Executive to direct reports, staff, senior leaders, etc.	☐ Manager
☐ Assign a coach to help the Executive progress in their current position, individual development and career goals	☐ Exec Development
☐ Executive should complete paperwork and security requirements	☐ Executive
☐ Ensure job roles and responsibilities are clearly communicated	☐ Manager
☐ Executive should meet with direct reports and staff	☐ Manager
☐ Provide the Executive with the resources, tools and opportunities to accomplish tasks in this phase	☐ CSEMO ☐ Gaining Organization

FIRST 30 DAYS The goal within the first 30 days is to establish roles and responsibilities of the new Executive as it relates to performance, development and ethical behavior. Executives should also begin to build relationships and business partnerships.	ROLE & RESPONSIBILITY
☐ Draft the Executive's performance objectives	☐ Manager
☐ Executive should create an Executive Development Plan (EDP) with his/her manager and solicit input from coach/mentor	☐ Executive
☐ Executive should schedule a formal feedback session with his/her manager and coach	☐ Executive
☐ ⌨ Facilitate networking opportunities and provide resources to make networking possible	☐ Gaining Organization
☐ Discuss with the Executive his/her individual work styles and preferences and provide feedback and performance expectations to Executive coaching program contractor for assessment development	☐ Manager
☐ ⌨ Register for the OPM SES Briefing for New Executives https://www.leadership.opm.gov/planning/sesbriefings/index.aspx	☐ Exec Development
☐ ⌨ Executive should take assessment (if haven't taken within last 6 months) for CSEMO's Executive Coaching Program	☐ Executive

☐ Executive should seek out unwritten rules (e.g., how to get things done; who can help and 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 1	☐ Executive
☐ Executive should begin scheduling "meet-n-greet" appointments with key stakeholders from other organizations (e.g., programs, policies, and budget). Executive should consult with his/her manager to confirm stakeholders	☐ Executive
☐ Executive should initiate a risk assessment. This can take the form of "90 questions in 90 days" (these are strategic questions an Executive should ask and get the answers to in order to better understand the agency and his/her role in contributing to the organization)	☐ Executive
☐ 🖱Contact the Executive to get feedback on his/her experience after 30 days	☐ Exec Development
☐ Conduct an Executive briefing, transition meeting or other forum to provide the Executive with information about their work group. The briefing should include: 　o　The 12 month calendar and a letter from the previous Executive to gain a perspective on organizational history, culture, priorities and "lesson learned" 　o　Fact sheets on the 'hot issues' that will require the Executive's attention within the first 90 days 　o　A quick introduction to personnel policies and rules (financial do's and don'ts, acquisitions, hiring, firing, contractor support) 　o　A discussion of initial projects and roles and responsibilities, including past performance standards 　o　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.	☐ Gaining Organization ☐ Manager
☐ Assign an Executive sponsor. A sponsor accelerates the new Executive's ability to deal with confusing issues early and become comfortable in the new work place. 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 be answered by a sponsor	☐ Manager

FIRST 90 DAYS The goal within the first 90 days is to 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.	ROLE & RESPONSIBILITY
☐ 🖥 Executive should identify professional development opportunities	☐ Executive ☐ Manager ☐ Exec Development
☐ Executive should develop an action plan based on the risk assessment initiated in Week 1	☐ Executive
☐ Executive should review performance objectives with his/her manager	☐ Manager ☐ Executive
☐ Executive should have met with coach and mentor	☐ Executive
☐ 🖥 Contact the Executive to get feedback on his/her experience after 90 days	☐ Exec Development

6 MONTHS The goal within the first 6 months is to provide guidance and feedback to the Executive to ensure continued success and to make plans for his or her future with the organization.	ROLE & RESPONSIBILITY
☐ Executive should engage in a leadership assessment process (e.g., 360, DISC, MBTI,) for developmental purposes and to identify areas for improvement; follow up with coaching and/or an action plan if appropriate	☐ Executive ☐ Exec Development
☐ 🖥 Executive should schedule a formal feedback session with his/her manager	☐ Executive ☐ Manager
☐ Executive should reflect on his/her role with coach/mentor	☐ Executive
☐ 🖥 Executive should revisit the EDP to assess professional development goals and track progress	☐ Executive
☐ 🖥 Contact the Executive to get feedback on his/her experience after 6 months	☐ Exec Development

1 YEAR The goal within the first year is to monitor performance, individual development, goals and desires and to engage the Executive in advancing the mission of the organization.	ROLE & RESPONSIBILITY
☐ 💻 Executive should develop a roadmap for long-term success	☐ Executive ☐ Manager
☐ Provide an anniversary pin and card from the Secretary/Director	☐ CSEMO DAS
☐ Ensure that Executive has attended OPM's SES Briefing and VA Executive Forum	☐ Exec Development
☐ 💻 Notify the Manager the probationary period is ending	☐ Employee Relations
☐ 💻 Contact the Executive to get feedback on his/her experience after 1 year	☐ Exec Development

18 MONTHS For the next 6 months, the goal is to continue ensuring that the Executive fully assimilates to the Department and his/her organization.	ROLE & RESPONSIBILITY
☐ 💻 Register Executive for CSEMO's Mandatory Executive Training Courses	☐ Executive ☐ Exec Development
☐ Follow up with the Manager on any leadership developmental needs Executive may require	☐ Exec Development
☐ Closeout and assess onboarding process	☐ Executive ☐ Manager ☐ Exec Development