

EXECUTIVE ONBOARDING PROGRAM

Phase 1 Acquire

Phase 2 Accommodate

Phase 3 Assimilate

Phase 4 Accelerate

- Identify and discuss the role
- Develop detailed job description that reflects the:
 - qualifications
 - experience
 - **□** responsibilities
 - evaluation matrix
- Utilized a search or recruitment process
- Choose recruitment method
- Evaluate the candidate
- Select the candidate
- Reference the candidate
- Select the "right' person

- Set up office space, technology, phones, mobile, computers, email, profiles of staff, access cards, policy+procedures manual, payroll, company car, ins. forms, etc. prior to arrival.
- Org. review with COO, CMO, CFO, CHRO, appointments preset for 2 months out.
- Set up a schedule of key internal and external meetings.
- Corporate overview on mission, vision, values, traditions, behavioral norms

- Coordinate
 Onboarding with
 Co's orientation
 program
- Arrange meetings with internal management covering: The company story
 - **□** Org structure
 - Role as they see it
 - Socialization■ Access points
- Schedule appointments with peers / subordinates
- Clarify performance expectations
- Progress meeting with Board/Senior Management

- Define landscape
- Learn supporters and detractors
- Understanding core business
- Clarifying their role
- Articulate strategies, operation methods, and people strategy
- Create a network across the organization
- Define the objectives to a rapidly successful outcome.
- Review the first 90 days with the Board or Senior Management

Please review the onboarding checklist.

COMMUNICATIONS AND TIMING

Based upon the role of the individual or team, a specific plan and objectives should be developed with expectations integrated in the process of the first three months to four months, and on very specific programs, twelve months. Very specific internal and external networking meetings and/or activities should be developed to accommodate this process. Many times, the new executive in conjunction with an onboarding program and the new network of people develops an overall business and human capital strategic plan to review with the Board or Senior Management.

Prior to Hire

to 4 Weeks

4 to 6 Weeks

6 to 12