NEW HIRE CHECKLIST

Everything you need to know to get new managers up to speed for a single project or as full-time employees.

PROPARED

1. BEFORE NEW HIRE BEGINS

- ☐ Notify Security and IT of start dates
- ☐ Notify your team of new hire's role and reporting structure
- ☐ Notify HR of new hire start date
- ☐ Assign mentor or "go-to" person for new hire
- ☐ Order or create business cards, email signatures, etc.*

2. WEEK ONE

- ☐ Overview of company history (why do we do what we do?)
- ☐ Overview of company goals, business trajectory, client personas
- ☐ Introduce to the direct project team (PAs, other managers, etc.)
- ☐ Introduce to non-project team (HR, Legal, Finance, etc.)
- ☐ Introduce to mentor or "go-to person"
- ☐ Overview of software and technology setup
- ☐ Review Employee Handbook
  - ☐ Financial, expense reporting policies
  - ☐ HR reporting, timesheet documentation procedures
- ☐ Case study (walk through typical event process, past or fictional)*

3. END OF FIRST MONTH

- ☐ Feedback on company (our processes, inefficiencies, opportunities)
- ☐ Feedback on training/onboarding program (good? bad?)
- ☐ Check in with mentor (how is new hire integrating with team?)

4. END OF FIRST PROJECT

- ☐ Solicit feedback from project team and client
- ☐ Meet with new hire: project post mortem
- ☐ Identify areas for improvement for next project, set goals

5. 90 DAY REVIEW

- [ ] Solicit 360° feedback from organization about new hire
- [ ] Sign off on new hire, move out of probation period
- [ ] Set long term goals (to be reviewed at annual evaluation)

6. ANNUAL REVIEW

- [ ] Solicit 360° feedback from organization about employee
- [ ] Review goals (met, in progress, adapted, etc.) and set new ones

THOUGHTS

- The items marked with an asterisk (*) you may choose to skip. Assess the the length and scope of the project, time available, and the complexity of the position to determine if these steps are necessary.

- This checklist is intended for ANYONE you hire to manage an event. Even if you're initially only hiring for one project. It makes hiring again that much easier if you take the time to find and train someone with whom you can create an lasting relationship.

NOTES

Happy Project-ing!
-Team Propared

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