

Executive and Leadership Onboarding Checklist

This printable document serves as a comprehensive onboarding framework for incoming executives and leaders. Use the text fields to record completion dates, notes, and responsibility sign-offs.

Executive Profile

Executive Name:

Title / Role:

Start Date:

Executive Sponsor / Mentor:

Phase 1: Pre-Boarding & Administrative Setup (Before Day 1)

Onboarding Task	Responsible Party	Date Completed	Notes / Details
Announce executive appointment to the organization and key stakeholders.	CEO / Communications	<input type="text"/>	<input type="text"/>
Set up executive office, computer, mobile device, and security access.	IT / Facilities	<input type="text"/>	<input type="text"/>
Prepare strategic documents, board minutes, and organizational charts.	HR / Admin Assistant	<input type="text"/>	<input type="text"/>
Schedule introductory 1-on-1 meetings with direct reports and peers.	HR / Executive Assistant	<input type="text"/>	<input type="text"/>

Phase 2: First Week (Orientation & Immediate Alignment)

Onboarding Task	Responsible Party	Date Completed	Notes / Details
Conduct executive welcome briefing and review the first week's schedule.	Executive Sponsor	<input type="text"/>	<input type="text"/>
Review corporate strategy, financial performance, and annual goals.	CFO / CEO	<input type="text"/>	<input type="text"/>
Conduct first team meeting with direct reports to establish presence.	Incoming Leader	<input type="text"/>	<input type="text"/>
Understand immediate operational fire drills and short-term priorities.	Incoming Leader	<input type="text"/>	<input type="text"/>

Phase 3: First 30 Days (Deep Dive & Stakeholder Relations)

Onboarding Task	Responsible Party	Date Completed	Notes / Details
Conduct 1-on-1 listening tour with key external partners, clients, and vendors.	Incoming Leader	<input type="text"/>	<input type="text"/>
Assess team capabilities, talent pipeline, and cultural dynamics.	Incoming Leader / HR	<input type="text"/>	<input type="text"/>
Review key technology systems, cybersecurity protocols, and risk registers.	CIO / Risk Officer	<input type="text"/>	<input type="text"/>
Identify "quick wins" to build momentum and establish credibility.	Incoming Leader	<input type="text"/>	<input type="text"/>

Phase 4: Days 30 to 90 (Strategy Formulation & Execution)

Onboarding Task	Responsible Party	Date Completed	Notes / Details

Onboarding Task	Responsible Party	Date Completed	Notes / Details
Draft and present the 90-day strategic assessment and vision to the CEO/Board.	Incoming Leader		
Establish Key Performance Indicators (KPIs) and OKRs for the department.	Incoming Leader		
Implement necessary organizational design changes or resource reallocations.	Incoming Leader / HR		
Conduct 90-day formal performance and integration review feedback session.	CEO / Board Representative		

Signatures and Approvals

Executive Signature: Date:

CEO or Sponsor Signature: Date: