



SAMPLE ORIENTATION PLAN: NEW MANAGER FROM OUTSIDE THE COMPANY

A good orientation process helps new employees understand the organization, establish job and cultural expectations, make connections with teammates and accelerate the learning curve. Below are sample experiences to include in a 60-day orientation plan for a new manager from outside the company.

OVERVIEW: ORIENTATION GOALS FOR THE NEXT 60 DAYS

- I. **Establish solid relationships** – meet with others inside and outside the department. Let people get to know you and get a surface-level understanding of the work they do. These meetings are as much social as substantive.
- II. **Lead the team** – know the team’s purpose, priorities, projects, challenges, work procedures and core competencies. Help team members complete their projects and begin charting the team’s direction.
- III. **Understand the department** – know the department’s priorities, measures of success, structure and business plan. Understand the behaviors and personal attributes valued most in employees.
- IV. **Understand the company** – familiarize yourself with the corporate structure, business goals, brand values, customers and employees. Understand what it takes to succeed here. Know how each line of business makes money, how it is improving work processes and what it is doing to enhance the customer experience.

DAY 1 - 30

Activities	Contact	Timing
Establish Solid Relationships		
Have lunch with your manager to discuss the orientation process	[people who can arrange activities]	[scheduled dates for activities]
Attend welcome breakfast with teammates		
Set up one-on-one meetings/lunches with other members of the department <ul style="list-style-type: none"> • [Names of people to meet] 		
Lead The Team		
Review team overview presentation		
Review structures and roles of each functional area		
Set up one-on-one meetings and lunches with your team		
Lead staff meetings		
Support team members in their assignments and help them resolve issues		
Understand The Department		
Review the department website, org charts and core work processes		
Review descriptions of department priorities, business plan, measures of success and valued behaviors		
Meet with other managers to review their roles, current initiatives and expectations of you		
Meet with others who support the department, e.g., Human Resources, Finance, Marketing, Legal		

Understand The Company		
Attend Day 1 orientation session		
Review company intranet and Internet sites, recent Annual Report, corporate messages, internal publications, significant presentations		
Review org charts and business primers for key divisions		
Review corporate business plan		
Familiarize yourself with the company's key business and operating initiatives		
Understand regional and labor relations issues		

ORIENTATION DAY 30 - 60

Activities	Resource	Timing
Establish Solid Relationships		
Meet with remaining key people in the department		
Meet with leaders outside the department		
Lead The Team		
Counsel your clients and other business partners		
Oversee team projects		
Meet with teammates at other locations		
Understand The Department		
Meet with department management team to introduce yourself and get a surface-level understanding of their key priorities and responsibilities		
Understand The Company		
Meet with marketing leaders to understand the brand—what it stands for, how it is being communicated internally and externally, how the organization is preparing employees to live up to its promise		
Visit a consumer site		
Visit an operations facility		
Visit a call center		

SUGGESTED APPROACH

1. Your manager will send the announcement about your new position to everyone named in your orientation plan.
2. Have your assistant arrange the meetings.
3. Prepare a list of questions to ask (including common questions for everyone and specific questions based on the responsibilities of the person you are meeting).
4. Send an e-mail before the meeting to confirm the time, state the purpose and present your questions.
5. Schedule two 30-day checkpoints with your manager to discuss progress to date, general impressions and next steps.