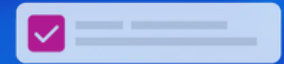


The First 90 Days: Internal Mobility Onboarding Checklist

Whether you're supporting an employee transferring to a new department or preparing an employee for a promotion, use this step-by-step internal mobility onboarding checklist to make transitions easier. From initial planning to ongoing support, this checklist covers some of the essential steps to make your next internal onboarding process a seamless success.

Please note: the examples included in this checklist are not exhaustive. This resource is meant to be customized for your specific industry, company, or onboarding needs.



Resources to Share in the First 90 Days:

For Internal Hires Being Promoted to Manager or Supervisory Roles

Create a "Manager Essentials" Page – Links for Manager Resources on:

- | | |
|---|---|
| <input type="checkbox"/> Leadership behaviors | <input type="checkbox"/> Leadership profiles |
| <input type="checkbox"/> Employee engagement survey | <input type="checkbox"/> People and culture one-sheet |
| <input type="checkbox"/> Team member profiles | <input type="checkbox"/> Guidelines for onboarding new hires |
| <input type="checkbox"/> Company employee engagement platform | <input type="checkbox"/> Company performance management tools, policies, and/or systems |
| <input type="checkbox"/> Leadership development courses (See Leadership Course Collection on page 4) | <input type="checkbox"/> Mentorship & coaching guide |

Resources to Share in the First 90 Days:

For Internal Hires Moving Teams:

- | | |
|---|---|
| <input type="checkbox"/> Company performance management tools, policies, and/or systems | <input type="checkbox"/> Company employee engagement platform |
| <input type="checkbox"/> Overview of team tools and systems | <input type="checkbox"/> Leadership profiles |
| <input type="checkbox"/> Team member profiles | <input type="checkbox"/> People and culture one-sheet |

Manager Checklist: **Days 1 – 30**

| | |
|---|--|
| <i>For Internal Hires Being Promoted to Manager or Supervisory Roles</i> | |
| WEEK 1 | <input type="checkbox"/> Assign a leadership buddy to your internal hire, to assist them with their integration into their new management or supervisory role. |
| | <input type="checkbox"/> Add internal hire to appropriate team and company communications channels. |
| | <input type="checkbox"/> Add internal hire to team and company business systems or project management platforms |
| | <input type="checkbox"/> Invite to recurring management meetings: give the employee visibility into any regularly scheduled forums or facilitated meetings that concern community-building, communication, and manager enablement for people programs. |
| | <input type="checkbox"/> Encourage self-enrollment in leadership development courses (see “Resources to Share” listed above.) |
| | <input type="checkbox"/> Set expectations and outline next steps that the new manager will need to take to support the professional development goals of their direct reports. |
| | <input type="checkbox"/> Encourage internal hire to journal in the first 30 days in their new role, and reflect on learnings. |
| <i>For Internal Hires Moving Teams:</i> | |
| WEEK 1 | <input type="checkbox"/> Assign a team buddy to your internal hire, to assist them with their integration into their new team. |
| | <input type="checkbox"/> Add internal hire to team and company business systems or project management platforms. |
| | <input type="checkbox"/> Add internal hire to appropriate team and company communications channels. |
| | <input type="checkbox"/> Introduce talent development tools used by your organization to evaluate employee performance and determine Individual Development Plans (IDP). |
| | <input type="checkbox"/> Set expectations and outline next steps that the new internal hire will need to take to support their own professional development goals. |
| | <input type="checkbox"/> Encourage internal hire to journal in the first 30 days in their new role, and reflect on learnings. |
| WEEK 2 | <input type="checkbox"/> Assign relevant product or service trainings aligned to new role. |
| | <input type="checkbox"/> Review strategy, process, budget, and goals of relevant projects with internal hire. |
| | <input type="checkbox"/> Schedule weekly one-on-ones with internal hire. |

| | |
|--------|---|
| WEEK 3 | <i>For Internal Hires Being Promoted to Manager or Supervisory Roles:</i> |
| | <input type="checkbox"/> Have internal hire shadow their leadership buddy and report back on key learnings. |
| | <i>For Internal Hires Moving Teams:</i> |
| WEEK 4 | <input type="checkbox"/> Have internal hire shadow their team buddy and report back on key learnings. |
| | <input type="checkbox"/> Ask internal hire for feedback / assistance on a new or existing project. |
| | <input type="checkbox"/> Have a 30-day check-in to gather feedback from the internal hire on the onboarding process and begin opening up a discussion about their professional development goals. |

Manager Checklist: **Days 30 – 60**

| | |
|--------|---|
| WEEK 1 | <input type="checkbox"/> Gather suggestions from internal hire on current systems/processes that are relevant to their role |
| | <input type="checkbox"/> Determine whether adjustments to the internal hire's role or responsibilities are needed |
| WEEK 2 | <input type="checkbox"/> Work with internal hire to develop a timeline for meeting key project deliverables |
| WEEK 3 | <input type="checkbox"/> Determine KPIs for key project |
| | <input type="checkbox"/> Ask internal hire to present a high-level overview of this project to executive leadership team |
| WEEK 4 | <input type="checkbox"/> Have a 60-day check-in where internal hire can provide feedback on the onboarding process |
| | <i>For Internal Hires Moving Teams:</i> |
| | <input type="checkbox"/> Continue the conversation on professional development goals: ask internal hire to begin setting professional development goals and setting up regular check-ins. |
| | <i>For Internal Hires Being Promoted to Manager or Supervisory Roles:</i> |
| | <input type="checkbox"/> Encourage internal hire to begin setting professional development goals with their direct reports; have them schedule regular check-ins with their direct reports. |

Manager Checklist: **Days 60 – 90**

| | |
|--------|---|
| WEEK 1 | <input type="checkbox"/> Transfer ownership of role-related deliverables and responsibilities to internal hire. |
| | <input type="checkbox"/> Check in with the internal hire's colleagues and direct reports to gather feedback about how they are integrating and collaborating with their new team. |
| WEEK 2 | <input type="checkbox"/> Ensure ownership of reporting to executive leadership and other key stakeholders. |
| WEEK 3 | <input type="checkbox"/> Reinforce the importance of self-guided leadership development training; re-share relevant leadership courses, if needed. (See Leadership Course Collection below) |
| WEEK 4 | <i>For Internal Hires Being Promoted to Manager or Supervisory Roles:</i> |
| | <input type="checkbox"/> Have a 90-day check-in where internal hire can share the professional development goals and reflect on the performance of their direct reports, while providing feedback on their own internal onboarding process. |
| WEEK 4 | <i>For Internal Hires Moving Teams:</i> |
| | <input type="checkbox"/> Have a 90-day check-in where internal hire can share their professional development progress and provide feedback on their own internal onboarding process. |

Here at Litmos, our Leadership Course Collection covers 4 core leadership behaviors, co-created by Litmos managers and employees.

To develop the most effective leadership training, consider the desired behaviors and skills that leaders need to meet aligned with? your organization's goals, and build accessible, engaging modules around those goals. For out-of-the box leadership courses, explore the Litmos course library.

[Explore course library](#)

