

Manager Onboarding Planning Guide

SOP · US · Updated 2026-07-13 · Square brackets are placeholders to replace with your own details.

A manager onboarding planning guide is a week-by-week procedure a manager works through to prepare for a new hire — from offer acceptance to the end of the first month — covering what to book, order, check, and review, and when. Where the new hire onboarding checklist tracks what the employee receives, this guide tracks what the manager prepares.

Poor onboarding is rarely caused by unwilling managers — it is caused by no plan: the account not set up, the buddy on vacation, the first day improvised in front of the new person. Thirty minutes of planning at offer stage prevents almost all of it, and it is also what makes the federal paperwork happen on time instead of in a panic.

This guide covers offer-stage preparation, the week before the start date, a structured first day, weeks one to four, and how to check the onboarding actually worked.

Purpose and scope

This guide sets out how managers at [Your company] plan and run a new hire's onboarding. Use it alongside the new hire onboarding checklist: that document is the employee's record; this one is your planning tool.

It applies to every hire — and the shorter the engagement, the more the plan matters, because there is no slack to recover a bad start.

Planning principles

- Plan backwards from day one: the paperwork items (I-9 documents, W-4, state forms) and the physical items (equipment, access, uniform) have lead times.
- One named owner per item — shared responsibility is nobody's responsibility.
- Protect the first day in the schedule: an onboarding run by a manager who is also covering the floor gets abandoned at the first rush.
- Stage the content: safety before work, essentials before detail, everything signed as it happens.

As soon as the offer is accepted

1. Send the offer letter and [employment agreement/handbook acknowledgment] for signature, and confirm start date, time, location, dress code, and who will meet them — in writing.
2. Send the new-hire packet: Form W-4, [state withholding form], direct deposit form, emergency contacts, and benefits information [if applicable].
3. Tell the new hire which original documents to bring for Form I-9 using the list of acceptable documents from USCIS — you may not specify which documents they choose — and diary the I-9 completion against the current USCIS deadline for [name/role].
- 4.

Order or reserve everything with a lead time: uniform, PPE in their size, IT accounts, POS or system logins, keys or door codes.

5. Choose and brief a buddy who will actually be scheduled alongside the new hire in week one.
6. Book your own calendar: the day one morning, an end-of-week-one review, and the 30-day review.

The week before they start

1. Confirm the equipment, accounts, and access are actually ready — check them yourself, do not assume the ticket was done.
2. Build the day one plan hour by hour, using the new hire onboarding checklist as the content list.
3. Schedule the buddy and the new hire on the same shifts for week one, and tell the team who is starting and what the buddy role is.
4. Print or set up the onboarding checklist for signing, and gather the documents the new hire needs to read: [list].
5. Reconfirm with the new hire two or three days out — a short message removes the day one no-show risk on both sides.

Day one

1. Be there when they arrive — the first ten minutes tell the new hire how the next year will feel.
2. Complete the I-9 steps that fall on day one and log the employer section as a tracked deadline for [name/role], per current USCIS instructions.
3. Run the safety essentials before any work: the tour, emergency exits and assembly point, first aid, how to report an injury or hazard, and the specific hazards of their role.
4. Alternate formal items with real work alongside the buddy; nobody absorbs six straight hours of policies.
5. Sign off each completed item on the onboarding checklist as it happens, not from memory at the end.
6. Close the day with fifteen minutes one-to-one: questions, first impressions, and what tomorrow looks like.

Weeks one to four

1. Verify the paperwork is closed out in week one: employer section of the I-9 signed off, W-4 and [state forms] processed before the first payroll, and the state new-hire report submitted by [name/role].
2. Hold the end-of-week-one review: progress against the training plan, what needs repeating, and how the schedule fits.
3. Release the new hire to unsupervised work task by task, only as each sign-off is completed.
4. Check in with the buddy weekly for the unfiltered version of how it is going.
5. Hold the 30-day review against [the role expectations/introductory period criteria] and record it: performance, attendance, training progress, and objectives for the next [60/90] days.
- 6.

Ask the new hire what the onboarding missed and feed the answer back into this guide and the checklist.

Measuring whether onboarding worked

- The onboarding checklist is fully signed within [number] weeks — audit this, do not assume it.
- The new hire can answer the safety basics unprompted at week four: alarm, exits, assembly point, injury reporting.
- Time to unsupervised competence against the norm for the role: [benchmark].
- Ninety-day retention and introductory period outcomes by manager — a pattern of early exits is usually an onboarding problem before it is a hiring problem.

Records and review

Keep your day one plan, review notes, and the signed checklist at [system/location]; I-9s are stored separately per current USCIS retention guidance. This guide is reviewed [frequency] and whenever the onboarding checklist, systems, or roles change. Owner: [name/role]. Next review due: [date].

How to use this template

1. Copy this guide into a per-hire template in [system] with the dates filled in backwards from the start date.
2. Set your own lead times against each offer-stage item — uniforms and IT accounts are the usual two-week items.
3. Add your state's hire items (withholding form, notices, new-hire reporting timeframe) from your state authority's current guidance.
4. Agree the buddy role formally: what they cover, what stays with you, and that they get scheduled time to do it.
5. Run your next onboarding from this guide as written, then edit it from experience — one real run beats three desk reviews.
6. Pair it with the new hire onboarding checklist so the employee-facing record and your plan never drift apart.

Official guidance

- › [USCIS — Form I-9, Employment Eligibility Verification](#)
- › [IRS — About Form W-4](#)
- › [OSHA — Training resources](#)

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