|  | CHECKLISTOn-Boarding New Manager Co-leads |
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|  | PURPOSETo accelerate the working relationship-building process between the new manager/leader and team, creating early wins, establishing a foundation of clear goals for moving forward.When to UseUse this tool when the team is joined by a new manager Co-lead.Who UsesCo-leads.How to UseFollow the instructions on the tool to help the team prepare for a new Manager Co-lead and to help ensure smooth transition of this new manager Co-leader. |
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| On-Boarding New Unit-Based Co-lead |
| Name: |  |
| Date Joining Team: |  |
| Initial Orientation Meeting Date/Time: |  |
| Initial Orientation Completed By: |  |

| Topics to Be Covered by Current Co-Lead and Sponsors |
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| **Roles of the Co-Leads** |
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| **Who are the Team Members** |
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| **Roles of the Team Members** |
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| **Roles of the Sponsors** |
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| **Context for Why We Have A UBT** |
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| **Strategic Team Goals That Tie to Regional Goals** |
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| **Current Performance Improvement Projects** |
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| **Training Requirements and Time Line for Training** |
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| **UBT Meeting Schedule and Next Meeting Date** |
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| Topics to Be Covered by Current Co-Lead and Sponsors |
| **Co-Lead Working Agreements (to Be Made When New Co-Lead Joins the Team)** |
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| **Co-Lead Working Styles Assessment** |
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| **Co-Lead Meeting Schedule** |
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