APPENDIX C

New Manager Checklists: First Day, Week, Month and Quarter

> **PURPOSE:** *Make sure you cover the essentials in your first days, weeks, and months as a manager, one milestone at a time.*

Manager: *Enter name*	**Start date:** *MM/DD/YYYY*	**Team:** *Team name*

HOW TO USE

Use these checklists to ensure you're covering the essentials in your first days, weeks, and months as a manager. Tick items as you complete them and use the notes rows to record what you learn and what you still need to ask.

FIRST DAY

- ☐ Meet with your manager to clarify expectations
- ☐ Introduce yourself to your team (individually if possible)
- ☐ Set up one-on-ones with each team member
- ☐ Review team documentation and current projects
- ☐ Understand your team's goals and metrics
- ☐ Get access to necessary systems and tools
- ☐ Review HR policies and procedures
- ☐ Identify your HR partner

FIRST DAY — NOTES

FIRST WEEK

- ☐ Complete one-on-ones with all direct reports
- ☐ Hold first team meeting
- ☐ Meet with key stakeholders and peer managers
- ☐ Review performance history of team members
- ☐ Understand current priorities and deadlines
- ☐ Learn your team's tools and workflows
- ☐ Set up recurring one-on-ones
- ☐ Document initial observations and questions

FIRST WEEK — NOTES

FIRST MONTH

- ☐ Establish your management rhythm (meetings, check-ins, reviews)
- ☐ Clarify roles and responsibilities for each team member
- ☐ Understand each person's career goals
- ☐ Identify quick wins and early priorities
- ☐ Review and refine team processes
- ☐ Give initial feedback to team members
- ☐ Build relationships with cross-functional partners
- ☐ Start developing your management philosophy
- ☐ Document your learning and questions

FIRST MONTH — NOTES

FIRST QUARTER (90 DAYS)

- ☐ Complete 90-day reviews with each team member
- ☐ Establish clear team goals and metrics
- ☐ Create or refine team culture and norms
- ☐ Address any performance issues
- ☐ Celebrate early wins with the team
- ☐ Develop individual development plans
- ☐ Build your support network (mentors, peer managers)
- ☐ Refine your management approach based on feedback
- ☐ Assess what's working and what needs adjustment
- ☐ Set goals for your second quarter

FIRST QUARTER — NOTES

Pro Tip: Your first 90 days set the tone for everything that follows. Listen more than you talk, resist the urge to change things before you understand them, and write down what you learn; you will not remember it later.