**[A blue and white sign

AI-generated content may be incorrect.](https://www.smartsheet.com/try-it?trp=8779&utm_source=template-word&utm_medium=content&utm_campaign=Executive+Onboarding+Plan-word-8779&lpa=Executive+Onboarding+Plan+word+8779)Executive Onboarding Plan Template**

|  |  |
| --- | --- |
| **Executive Name** | Name |
| **Job Title** |  |
| **Department** |  |
| **Hiring Manager / CEO** |  |
| **Onboarding Mentor / Liaison** |  |
| **Start Date** | MM/DD/YY |

|  |  |  |
| --- | --- | --- |
| Executive Onboarding Phases and Objectives | | |
| **Phase** | **Objective** | **Key Actions** |
| Preboarding (Before Start Date) |  |  |
| First 30 Days |  |  |
| First 90 Days |  |  |
| First Year |  |  |

|  |  |  |
| --- | --- | --- |
| Preboarding Tasks |  |  |
| **Task** | **Owner** | **Status** |
|  |  | **Complete** |
|  |  | **Not Started** |
|  |  | **In Progress** |
|  |  | **Complete** |
|  |  | **Complete** |

|  |  |  |
| --- | --- | --- |
| First 30 Days Checklist |  |  |
| **Task** | **Owner** | **Status** |
|  |  | **Complete** |
|  |  | **Not Started** |
|  |  | **In Progress** |
|  |  | **Complete** |
|  |  | **Complete** |

|  |  |  |
| --- | --- | --- |
| First 90 Days Goals |  |  |
| **Goal** | **Actions and Deliverables** | **Status** |
|  |  | **Complete** |
|  |  | **Not Started** |
|  |  | **In Progress** |
|  |  | **Complete** |
|  |  | **Complete** |

|  |  |  |
| --- | --- | --- |
| First Year Milestones |  |  |
| **Milestone** | **Owner** | **Status** |
|  |  | **Complete** |
|  |  | **Not Started** |
|  |  | **In Progress** |
|  |  | **Complete** |
|  |  | **Complete** |

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| Executive Development Goals | | |  |
| **Development Area** | **Goal** | **Action Plan** | **Status** |
|  |  |  | **Complete** |
|  |  |  | **Not Started** |
|  |  |  | **In Progress** |
|  |  |  | **Complete** |
|  |  |  | **Complete** |

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| Stakeholder Engagement | |  |  |
| **Stakeholders** | **Purpose of Engagement** | **Meeting Frequency** | **Status** |
|  |  |  | **Scheduled** |
|  |  |  | **Ongoing** |
|  |  |  | **Established** |
|  |  |  | **Scheduled** |
|  |  |  | **Scheduled** |

|  |  |  |
| --- | --- | --- |
| Challenges and Resolution Tasks | |  |
| **Challenge** | **Timeline / Resources Needed to Resolve** | **Status** |
|  |  | **Complete** |
|  |  | **Not Started** |
|  |  | **In Progress** |
|  |  | **Complete** |
|  |  | **Complete** |

|  |  |  |  |  |
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| Measuring Success | |  | |  |
| **Key Accountability Question** | **Executive's Response** | |
|  |  | |
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