

# KNOWLEDGE RETENTION & TRANSFER (KRT) MODEL



## OFFICE SPONSOR CHECKLIST

*An email introducing incoming staff member to the Office Sponsor will be sent by someone at the organization. Email should include the Office Sponsor's role as part of the orientation to help facilitate the transition for new staff. Suggested guidance for the Office Sponsor includes:*

### **4-6 weeks prior to incoming staff arrival**

- Hold an Introductory meeting with the new employee to provide an overview of the onboarding process and basic background about the office or organization. Ensure incoming staff have access to important background resources and recommend priority resources for them to review such as the handover memo.
- In collaboration with the staff, review the Orientation agenda.
- Begin scheduling all required briefing meetings noted on the Orientation agenda.

### **1 week prior to incoming staff arrival**

- Set up and maintain an onboarding tracker for new staff on the status of whether key onboarding components have occurred.
- Provide overview of key norms and information, noting ones that might relate to that person's job.
- Continue scheduling all required in-brief meetings noted on the Orientation agenda.

### **Staff arrival**

- Ensure that the employee is added to regularly scheduled meetings (office, team, supervisors, all staff meetings, etc.).
- Hold an end of week check in to assess onboarding progress.

### **6 weeks after staff arrival**

- After completing orientation – week 6 or so after arrival – hold an informal check in on the onboarding experience - using questions from the Onboarding Experience Survey to guide the conversation. Based on responses, provide additional support and use the information to inform future on-boarding processes.