

New Team Member Onboarding Checklist

Introductions

- ✓ Each team member has introduced themselves from a personal and work perspective
- ✓ Each team member has described current engagements and background (as appropriate)
- ✓ New team member has been introduced to the following:
 - Relevant cross-functional TKG team members
 - Other TKG colleagues
 - Relevant internal client stakeholders
 - Relevant agency partners
 - Relevant client-certified vendors
 - Relevant creative services (editorial, design, digital, etc.)
 - Job codes relevant to client work

Roles and Responsibilities

Overall Expectations

- ✓ Manager/team lead has reviewed the following core responsibilities and skills for the new team member to share general expectations in terms of each category:
 - Appropriate Working Hours and Expected Availability/Responsiveness
 - Project Management (*ie. leading and delegating as appropriate*)
 - Deliverable Execution (*ie. how to develop a deliverable from start to finish*)
 - Accountability (*ie. taking ownership of specific tasks/project elements*)
 - Time Management (*ie. importance of managing multiple projects/workstreams to meet deadlines*)
 - Quality Control/Document Hygiene (*ie. how to ensure documents are client friendly and proofed*)
 - Client Interaction (*ie. how to effectively engage with clients*)
 - Strategic Oversight/Development (*ie. how to think "big picture"*)
 - Teamwork (*ie. best practices for collaboration and keeping team informed*)
 - HC Landscape/Clinical Knowledge (*ie. importance of building one's knowledge of the market*)
 - Finance/Budget Management (*ie. familiarity with the TKG billing structure and process*)
- ✓ Team has discussed the overall roles and responsibilities of all team members to ensure transparency about each individual's role on this team

Specific Responsibilities

- ✓ Manager/team lead has reviewed the core responsibilities and skills as outlined in the *TKG Roles and Responsibilities Employee Grid*
- ✓ Manager/team lead has reviewed the proposed workstreams, deliverables, and level of involvement with the new team member
- ✓ Manager/team lead has discussed ongoing project management responsibilities such as status notes, status agendas, etc. as well as specific project responsibilities (for example, carrying forward changes and submission on a flashcard)
- ✓ Manager has discussed new team members' role on reoccurring status meetings as well as new ad-hoc calls/meetings (*ie. note-taking, leading a portion of status, etc.*)

Collaboration/Communication

- ✓ Team has identified an appropriate cadence for communication internally and externally
- ✓ Team has identified preferred method of communication (email, Slack, phone call, Zoom call, Teams meeting or call) internally and externally and defined any relevant team practices (*ie. be on slack but set away if not available, use of list serves, inbox management, etc.*)
- ✓ Team has discussed best practices around collaboration and keeping everyone informed on project status (*challenges/delays included*)
- ✓ Team has discussed best practices around review/turnaround times (internally and externally)
- ✓ Team has discussed best practices around managing competing priorities as well as conflicting meetings/calls
- ✓ Team has reviewed PTO planning as well as transparency around appropriate working hours, time out of the office for appointments, emergencies, etc.

Processes

- ✓ New team member has been onboarded to overall TKG processes and best practices including but not limited to:
 - TKG Methodology and Project Phases
 - TKG Creative Services
 - TKG KOL Database
 - Pharma 101
 - Harvest Utilization
 - Dropbox Utilization
 - Zoom/Microsoft Teams Utilization
 - Billing and Coding of Expenses
- ✓ New team member has been onboarded to client-specific processes and best practices including but not limited to:
 - MLR Submissions
 - MLR Platform and Training (as applicable)
 - Preferred List of Client-specific Vendors
 - Preferred List of Client-specific KOLs (as applicable)
 - Client-Specific Do's and Don'ts
 - Client-specific Harvest Utilization
 - Client-specific Dropbox Utilization
 - Client-specific Billing and Coding
 - Other?