

# Lattice Onboarding Checklist

When getting your team set up on Lattice, it is important first to determine what your performance management process will be. Answering the questions below will help make your setup a breeze.

## Uploading your employees

- Will you be uploading your employees through an [HRIS integration](#) (Bamboo HR, Namely, Rippling, Workday, Zenefits, Personio, ADP, Gusto)?
- If you don't use one of our one-click HRIS integrations, will you be uploading your employees using [SFTP](#) or [SCIM](#)?
- Will you be uploading your employees through [CSV](#)?

## Integrations

- Will you be setting up an [SSO](#)?
- Will you be integrating with [Slack](#)?

## Reviews

- When are you running your next [review](#)?
- How often will you be running reviews? (Quarterly, Mid-year, Annually)
- What type(s) of feedback will you collect in the review? (Self-Review, Manager Review, Peer Review, Upward Review)
- Should managers of managers have access to reviews of indirect reports?

## Goals

- Will employees be setting both public and private goals? (*Public goals can be seen by the whole company in Lattice, and Private goals can only be seen by their manager*)
- Will you be inputting [company-level goals](#)?
- Will there be [department-level goals](#)?
- Are there specific people who own those department-level goals?
- How often would you like Lattice to remind employees to update their goals? (Weekly, Bi-weekly, Monthly, Twice a quarter, Never)
- Will you be integrating goals with Salesforce or Jira?

## Feedback

- Will you want your employees to give [private feedback to an individual's manager](#) that can only ever be seen in Lattice by that manager?
- Do you have [company values](#) that can be attached to feedback in Lattice?
- Would you like to integrate the Feedback to [Gmail/Outlook](#)?

## Updates

- Will all managers be using [Updates with their direct reports](#)?
- If so, how often should the reminder email go out? (Weekly, Bi-weekly, Monthly)
- Would you like managers to have the ability to customize the Update questions on a [team/individual level](#)?
- Will you be using the template that Lattice provides? (*See template by going to Admin > Updates > Settings > Questions. If not, please think about which questions you'd like to use. [Here](#) is a helpful question bank.*)
- Should managers of managers have the ability to see Updates from their indirect reports?

## 1:1s

- Will all [managers be using the 1:1 tool](#) for their in-person 1:1s with their direct reports?
- Are there any specific talking points that you want to make sure everyone in the [company touches on in their 1:1s](#)?

## Engagement Surveys

- When are you [running your next Engagement survey](#)?
- How often will you be running surveys? (Quarterly, Bi-Annually, Annually)
- What type of survey(s) will you be running? (Engagement, Team Effectiveness, Diversity & Inclusion, Manager Effectiveness, Custom)
- How long would you like your Survey to accept responses?
- Is there anyone you would like to make a Survey Admin (Give full survey response access)?
- How many people need to respond to a survey before you can access the results (3-10 people)? *Note: this threshold protects the anonymity of your employees.*

## Grow

- Will you create your own tracks and competencies or use one of Lattice's Track Templates?
- Will employees be able to view all tracks or just their own?
- Will track levels sync automatically using your HRIS or via Lattice's custom attributes?
- To assist with career development, will employees use the default growth area templates or will you customize your own?