



Paycor[®]

A Paychex[®] Company

Empowering Leaders[™]

HR's Playbook: Developing Effective Leaders

Pro Tips & Templates



What's Inside:

EXECUTIVE SUMMARY	3
INTRODUCTION	4
COACH	5
Why Coaching Is Important	5
How to Coach	6
Coaching Resources	9
Checklist: Weekly 1:1 Topics	9
Template: Professional Development Plan	10
OPTIMIZE	11
Why Optimizing Is Important	11
How to Optimize	12
Coaching Resources	14
Checklist: Employee Survey Questions	14
Template: Performance Reviews	17
RETAIN	18
Why Retention Is Important	18
How to Retain	19
Retention Resources	22
Checklist: New Manager Training	22
Template: Favorite Things List	27
PAYCOR ADVANTAGE	28





EXECUTIVE SUMMARY



Nothing motivates employees more than a trusted leader.

- 70% of workers would quit their job over a bad manager, regardless of compensation (*LinkedIn, 2024*).
- Empathetic leadership makes employees 4x more likely to stay (*BCG, 2024*).
- At companies with strong coaching cultures, 65% of employees report being highly engaged (*International Coaching Federation, 2024*).
- The trouble is, less than half of managers have received any leadership training (*Gallup, 2025*). Despite good intentions, they don't always know how to support their teams.
- **In this era of AI advancement, empowered leaders who inspire loyalty and engagement are more important than ever.**

Paycor's COR Leadership Framework gives organizations access to the people, data, and expertise they need to *build a culture of effective leadership.*

- Organizations with the most effective leaders consistently see higher levels of employee engagement, creating a virtuous cycle of lower turnover, higher retention, and healthier company cultures.
- The best leaders focus on coaching their employees toward continual improvement, optimizing performance to meet organizational goals, and retaining top talent by appropriately recognizing and rewarding employees.

How to Use This Playbook: Throughout the playbook, you'll see checklists and templates designed to facilitate leadership development. Use them as they are or customize them to meet your team's unique needs.

INTRODUCTION



Why Leaders? Why Now?

WHY LEADERS?

For companies with 500+ employees, “developing leaders” is HR’s top priority for 2026 (*Paychex’s 2026 Priorities for Business Leaders Survey*). Why is this such a key element of business success? Because leaders across the organization, from the C-suite to frontline managers, disproportionately affect employee engagement.

At companies with strong coaching cultures, 65% of employees are highly engaged (*International Coaching Federation, 2024*), making them more productive and innovative. But great leadership isn’t just about boosting productivity. When leaders show empathy and foster psychological safety, 4x as many employees are likely to stay (*BCG, 2024*). **If you want to drive engagement, retention, and long-term business results, it all starts at the top.**

An organization with top-notch leaders who earn the trust of employees drives more engagement. And **the company with the most engaged employees wins by any measure**, be it revenue, productivity, or customer satisfaction.

The opposite is also true...

WHY NOW?

As of 2025, **52% of U.S. employees are “watching for or actively seeking a new job”** (*Gallup, 2025*). 66-70% of large companies are fighting voluntary turnover, with **work/life balance as the top reason for employee departures** (*Paychex’s 2026 Priorities for Business Leaders Survey*). And **70% of workers would quit their jobs over a bad manager**, regardless of compensation (*LinkedIn, 2024*). These are all systemic, cultural issues, meaning they’re HR’s problem to solve.

At the same time, technological advancements are changing the nature of work. Employees understand that AI isn’t coming for their jobs; the real threat is other candidates who know how to use it. Frontline workers across industries are hungry for training opportunities, and they rightly expect their employers to understand the pressure they’re under. If you can’t support their career goals, they’ll find someone else who can.

Leaders are more important than ever.

Strong, empathetic, supportive managers lead to high retention, thriving company cultures, and sustainable financial growth.

Get leadership right, and everything else follows.



Paycor, a Paychex company, empowers leaders to drive business results. We do that by offering an integrated HCM platform that streamlines every aspect of people management. And now, we’re supplementing our technology with the COR Leadership Framework.

Paycor’s COR Leadership Framework is built upon decades of research. We’ve found that the most effective leaders focus on intentionally coaching their employees towards continual improvement, optimizing performance and retaining top talent by appropriately recognizing and rewarding their employees.



COACH



OPTIMIZE



RETAIN

A coaching approach to leadership helps employees find the sweet spot between their own personal aspirations and the company's overarching needs. Effective coaches empower workers to identify their goals, refine their strengths, and address lingering skill gaps.

WHY COACHING IS IMPORTANT

Coaching promotes engagement and accountability. When employees are learning and growing, their day-to-day responsibilities feel like a path forward, not a repetitive slog. At businesses with coaching cultures, 65% of employees report being highly engaged (*International Coaching Federation, 2024*), which means they're more productive, more innovative, and more likely to stay.



HOW TO COACH

Show employees how their roles align with the company mission.

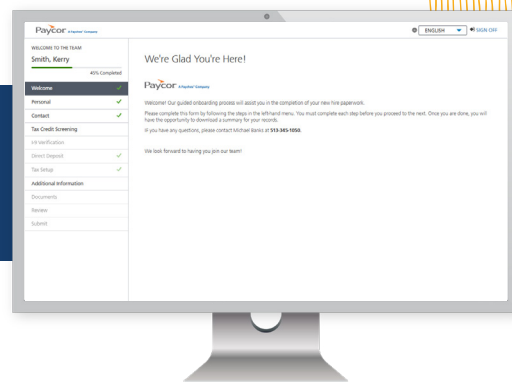
When employees feel a strong sense of purpose at work, they're 5.6x as likely to be engaged (*Gallup, 2025*). To foster a sense of purpose, start by clearly defining your company's mission: what it stands for, its goals, and how you plan to achieve them. Next, invite everyone in your organization to find their role within that mission. **Workers want to know their skills and hard work are contributing to something greater.** They want to feel like the opposite of a cog in the machine. They want to feel valuable.

ACTION PLAN:

1. **Break the ice, have the conversation.** Explain your company's mission & purpose. Don't assume everyone knows.
2. **Get to know employees at a deeper level than their resume.** What are their true skills & motivations? How are they uniquely able to contribute to your long-term business objectives? Connect the dots.
3. **Clarify company and individual goals.** Make sure each one is concrete, trackable, and achievable.

How Paycor Helps

Onboarding, 1:1 tool, Career Management,
Leader Homepage, 9-Box, LMS, Paycor Paths





HOW TO COACH

Build trust and watch what happens.

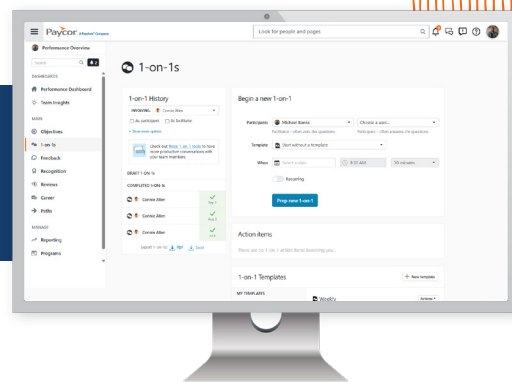
We're living through a time of cultural, economic, and technological transformation. Employees at every level are facing immense pressure, both in and outside of work. If you want them to thrive, research shows leaders should do three things: build trust, provide stability, and inspire hope (*Gallup, 2025*). **Get all three right and you'll foster psychological safety, which drives innovation and financial growth.**

ACTION PLAN:

- 1. Reflect on what trust looks like in a work environment.** Who do you trust? Most likely, you trust leaders who are accountable (they don't play the blame game), dependable (they follow through), and dialed in (they know what's actually happening on the front lines or the factory floor).
- 2. Get comfortable with appropriate transparency.** Trustworthy people are candid and straightforward, but leaders need to walk a fine line by withholding confidential information. That's okay. Earn trust by sharing what you can and being transparent about what you can't share and why.

How Paycor Helps

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HOW TO COACH

Invest in career paths; give people a sense of momentum.

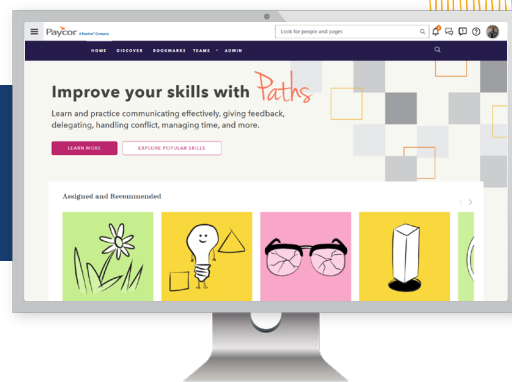
In this era of AI advancement, upskilling is more important than ever. Frontline workers are concerned about the future of their jobs, careers, and entire industries. You can set them up for success with a development program. **Encourage employees to learn new skills and put their knowledge into practice right away.** When you weave career growth opportunities into daily workflows, you build momentum for your employees and your business at the same time.

ACTION PLAN:

1. **Push beyond pay.** Compensation is important (more on that later), but it's not the only thing. Employees who feel supported to develop new competencies are 73% more motivated at work (*PWC, 2025*). To feel more secure and more prepared for the future, workers want to learn skills that will make them more valuable in any role.
2. **Beware assumptions.** If frontline leaders aren't empowered to have conversations about career advancement, employees will draw their own conclusions. When their assumptions don't come true ("I've been here 6 months, where's my raise?"), best case scenario is you've lost an employee; worst case, you've damaged company culture.

How Paycor Helps

Onboarding, 1:1 tool, Career Management, Leader Homepage, 9-Box, LMS, Paycor Paths





WEEKLY 1:1 TOPIC CHECKLIST

Use this checklist to guide your weekly 1:1s with direct reports. Not every topic needs to be covered each week; focus on what matters most, right now.

Before The Meeting

- ☐ Review last week's notes. What did you commit to following up on?
- ☐ Check recent projects. Are there wins to celebrate or roadblocks to discuss?
- ☐ Set aside 30 minutes. Protect the meeting time from interruptions.

Opening (5 minutes)

- ☐ "How are you doing—really?" Create space for honest check-ins that go beyond "fine."
- ☐ "What's top of mind for you this week?" Build trust by letting them set the agenda first.

Core Topics (20 minutes)

Choose a maximum of 3 core topics per week.

Current Work & Progress

- ☐ What's going well right now?
- ☐ Where do you need support?
- ☐ Do you have what you need to hit this week's goals?

Development & Growth

- ☐ What did you learn this week?
- ☐ What skill do you want to develop next?
- ☐ Are there projects or responsibilities you'd like to take on?
- ☐ Suggest a stretch goal or project for them to work toward.

Feedback & Recognition

- ☐ Name something they're doing well. Be as specific as you can.
- ☐ Suggest an opportunity for growth. Work together to create an action plan.
- ☐ What feedback do you have for me or the team?

Career Development

- ☐ How does your current work connect to your career goals?
- ☐ What energizes you? What drains you?
- ☐ Where do you see yourself growing in the next 6-12 months?

Team Dynamics

- ☐ How's collaboration going with the team?
- ☐ Is there anyone you'd like to work with more (or less)?
- ☐ Are there additional tools, resources, or types of support you need from me?

WEEKLY 1:1 TOPIC CHECKLIST

Closing (5 minutes)

- ☐ Recap action items and agree on deadlines.
- ☐ Schedule next week's meeting.
- ☐ End on a positive note. Acknowledge their effort or progress.

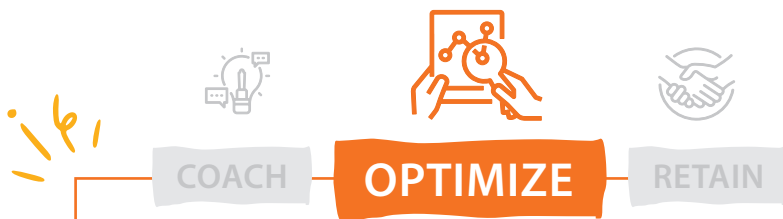
Quick Tips for Better 1:1s

- **Let them talk more than you do.** Your job is to listen, ask questions, and remove barriers, not fill airtime.
- **Take notes.** Following up builds trust and shows you're invested in their growth.
- **Skip the status updates.** Those can happen via chat or email; use this time for coaching and connection.
- **Be consistent.** Canceling sends the message that their development isn't a priority. If you must reschedule, do it promptly.
- **Ask open-ended questions.** Replace "Is everything okay?" with "What challenges are you facing right now?"

Coaching Resources

Download our FREE
Professional Development Plan Template





To optimize performance, leaders need to relentlessly pursue excellence while supporting employee well-being and protecting workers from burnout.

WHY OPTIMIZATION IS IMPORTANT

Leaders are responsible for the productivity of their teams. It's what managers are hired to do. And while most companies evaluate manager efficacy based on objective results and revenue goals, those achievements are built on the foundation of company culture.

Optimizing performance is a balancing act. **Effective leaders know how to model accountability without slipping into micromanagement.** They know how to encourage and cheer on employees without being a pushover. They lead by example and inspire others to go the extra mile.

HOW TO OPTIMIZE



Explain the “why behind the what.”

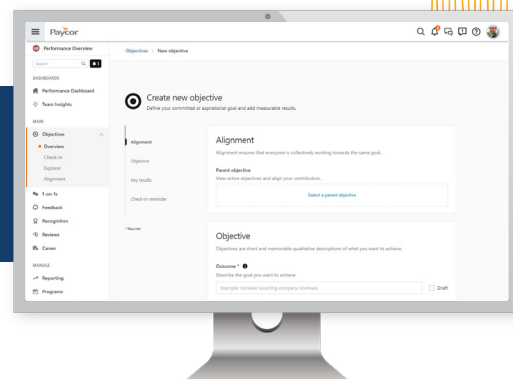
A common mistake first-time managers make is assuming everyone's on the same page. In a fast-paced work environment, it's easy to glide on assumptions. The foundation of optimal performance, however, is a shared definition of success at individual, team, and company levels. Direct reports need to understand not only their manager's expectations, but also what help and support their manager can realistically give. **Lay the groundwork for effective teamwork by explaining your leadership style and then following up to ensure direct reports are getting what they need to succeed.**

ACTION PLAN:

- 1. Be transparent about your leadership style.** If you're a hands-off manager, say so. If you're more hands-on in the beginning, explain that your approach will be to work with them closely for the first few months and eventually back off and let them run with it. Setting expectations early avoids confusion down the road.
- 2. Ask for feedback and be flexible.** You may find that a hands-off approach works well with senior team members, while less experienced workers want more handholding.
- 3. Explain the purpose behind 1:1s.** Ideally, you're meeting with each of your direct reports on a weekly or biweekly basis. Explain the logic behind these check-ins. Your goal is to build a relationship, get to know each other, and learn how you can better support them. It's not because you don't trust them to meet deadlines.

How Paycor Helps

Progress Tracking, Performance Reviews, Reporting,
Goals/OKRs, Time Budgeting/Forecasting



HOW TO OPTIMIZE



Create a “fail forward” culture.

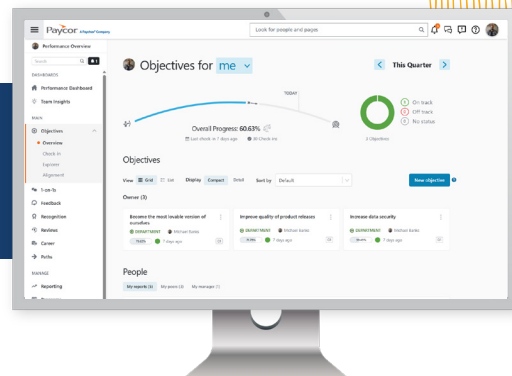
Some companies have a “meet your goals or else” mentality. That’s understandable, but it’s not optimal. If frontline managers are instructed to weed out team members who fail to hit their revenue goals, you implicitly encourage people to manipulate data and hide problems. **Instead, a “fail forward” culture encourages workers to aim for a goal and then, if they miss, learn from failure and continually improve.** Failing forward doesn’t mean you’re okay with missing the mark. It means your leaders are focused on learning from mistakes, not hiding them or shifting blame.

ACTION PLAN:

1. **Document goals so you have a north star.** Rally your team around objective, measurable results. Everything starts from here.
2. **Learn from failure.** A missed goal is an opportunity for an effective leader to learn more about the employee experience. Why was a goal missed? What roadblocks need to be removed? What processes need attention? What will your team do differently next time?
3. **Celebrate the wins.** When the team meets or exceeds goals, recognize the people who worked together to make it happen. Highlight what went right just as intentionally as you’d diagnose what went wrong. Enshrine best practices by recognizing and rewarding success. (Learn more about the importance of recognition in the “Retain” section.)

How Paycor Helps

Progress Tracking, Performance Reviews, Reporting,
Goals/OKRs, Time Budgeting/Forecasting





EMPLOYEE SURVEY QUESTION CHECKLIST

Use this checklist to design employee surveys that give you actionable insights on the employee experience. Choose questions that align with your current HR strategy and organizational goals, and feel free to add your own!

Before You Build Your Survey

- ☐ Define your objective: What decisions will this data inform?
- ☐ Set a realistic length: Aim for 15-20 questions (10-15 minutes max)
- ☐ Plan your follow-up: How will you share results and take action?
- ☐ Ensure anonymity: Honest feedback requires psychological safety.

Core Engagement Questions

Select 3-5 questions to measure employees' connection to work and the organization.

- ☐ I understand how my work contributes to company goals.
- ☐ I would recommend this company as a great place to work.
- ☐ I'm proud to work here.
- ☐ I feel motivated to go above and beyond in my role.
- ☐ I see myself still working here in two years.
- ☐ I have the resources and tools I need to do my job well.

Manager Effectiveness

Select 2-4 questions to assess the quality of leadership.

- ☐ My manager provides regular, helpful feedback.
- ☐ My manager cares about my career development.
- ☐ I trust my manager to make good decisions.
- ☐ My manager removes barriers so I can do my best work.
- ☐ I feel comfortable sharing concerns with my manager.
- ☐ My manager recognizes my contributions.



EMPLOYEE SURVEY QUESTION CHECKLIST

Wellbeing & Work-Life Balance

Select 2-3 questions to gauge employee wellbeing and sustainability.

- ☐ I'm able to maintain a healthy work-life balance.
- ☐ I feel supported in managing work-related stress.
- ☐ I have the flexibility I need to manage personal responsibilities.
- ☐ My workload is manageable.
- ☐ I feel comfortable taking time off when needed.
- ☐ The company supports my physical and mental health.

Growth & Development

Select 2-3 questions to understand learning opportunities.

- ☐ I have opportunities to learn and grow in my role.
- ☐ I receive the training I need to be successful.
- ☐ I can see a clear path for career advancement here.
- ☐ I'm being challenged in ways that help me develop new skills.
- ☐ My manager and I have meaningful conversations about my career goals.

Inclusion & Belonging

Select 2-3 questions to measure psychological safety.

- ☐ I feel valued for my unique contributions and perspectives.
- ☐ I can be myself at work without fear of negative consequences.
- ☐ People from all backgrounds have equal opportunities to succeed here.
- ☐ My opinions are heard and considered in decision-making.
- ☐ I feel like I belong on my team.

Communication & Transparency

Select 1-2 questions to assess information flow.

- ☐ I receive the information I need to do my job effectively.
- ☐ Leadership communicates openly about company direction and changes.
- ☐ I understand the reasoning behind major company decisions.
- ☐ I feel comfortable sharing ideas and concerns with leadership.



EMPLOYEE SURVEY QUESTION CHECKLIST

Team Dynamics

Select 1-2 questions to evaluate collaboration.

- ☐ I trust my coworkers to do quality work.
- ☐ My team collaborates effectively.
- ☐ People on my team support each other.
- ☐ Conflicts are handled constructively on my team.

Recognition & Rewards

Select 1-2 questions to measure appreciation and compensation satisfaction.

- ☐ I'm recognized when I do good work.
- ☐ I'm compensated fairly for my contributions.
- ☐ High performers are rewarded here.
- ☐ I feel valued by the organization.

Open-Ended Questions

Include 1-2 to capture nuanced feedback.

- ☐ What's one thing leaders should start doing to improve your experience at the company?
- ☐ What's one thing leadership should stop doing?
- ☐ What's working well that the company should keep doing?
- ☐ If you could change one thing about working here, what would it be?
- ☐ What would make you more likely to recommend us as a great place to work?

EMPLOYEE SURVEY QUESTION CHECKLIST

Survey Design Best Practices

- **Use a consistent scale.** 5-point Likert scales (Strongly Disagree to Strongly Agree) can streamline analysis and year-over-year comparisons.
- **Avoid leading questions.** Replace “Don’t you agree that our benefits are excellent?” with “I’m satisfied with our benefits package.”
- **Time it right.** Avoid peak busy seasons, major organizational changes, or right before holidays.
- **Keep it short.** Every additional question decreases completion rates. Prioritize ruthlessly.
- **Communicate the “why.”** Tell employees how you’ll use the data and share results within 30 days.

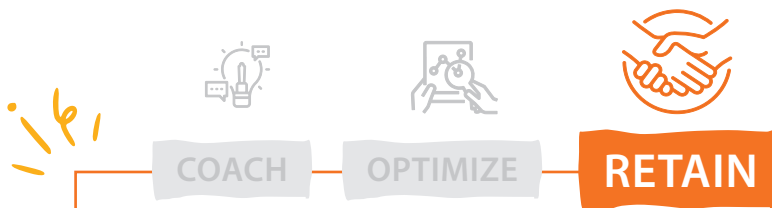
After the Survey

- ☐ Analyze by segment. Look for patterns by department, tenure, manager, and other qualifiers.
- ☐ Share results transparently, even if they’re not what you hoped for.
- ☐ Create action plans. Prioritize 2-3 key goals and weave them into your HR strategy.
- ☐ Close the loop. Show what changes you’re making based on feedback.
- ☐ Track trends over time. Compare results across survey periods.

Optimization Resources

Download our FREE
Performance Review Template





Leaders inspire loyalty by rewarding and incentivizing employees in a holistic way that makes them feel authentically valued.

WHY RETENTION IS IMPORTANT

Retaining employees is a long-term growth strategy. It maintains company culture, preserves institutional knowledge, and empowers team members to form healthy relationships and even friendships, all of which are good for business.

Turnover is expensive. It costs up to \$200,000 per employee at larger companies (*Paychex's 2026 Priorities for Business Leaders Survey*), and has a major impact on company culture. Voluntary turnover is often contagious, especially if the people who leave are well-liked. **Drive retention by learning what motivates your unique team members.** (The act of asking what inspires them is its own opportunity to make them feel seen.) Then, build a rewards and recognition program that offers effective, meaningful incentives.

HOW TO RETAIN



Don't assume it's always about money.

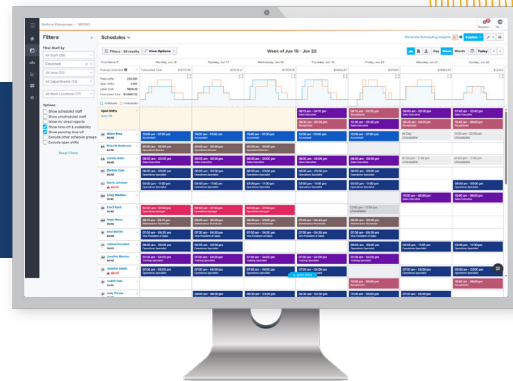
Money gets workers in the door, but it may not make them stay. This is where soft skills drive hard results. 70% of employees would quit their job over a bad manager, regardless of compensation (*LinkedIn, 2024*). On the other hand, empathetic leadership improves employees' motivation and happiness. Get this right, and 4x as many employees are likely to stay (*BCG, 2024*).

ACTION PLAN:

- 1. Give managers the support they need.** In 2025, less than half of managers had ever received managerial training (*Gallup*). Buck the trend by designing an onboarding and training process for every new manager, including new hires and internal promotions. This best practice sets managers up to build strong, trusting relationships with their direct reports.
- 2. Encourage leaders to think holistically about retention.** In 2023, retail workers cited a lack of career development as the #1 reason they planned to leave their jobs, followed by low compensation, lack of recognition from leaders, and low understanding from direct managers (*McKinsey*). Developing leaders at every level drives company-wide retention.
- 3. Empower managers to offer solutions to employees' problems.** Just imagine what a difference it would make if your frontline managers could confidently resolve workers' most urgent and personal concerns (think scheduling, OnDemand pay, benefits, paid time off, and more). When current employees and job candidates feel heard, understood, and valued, it's far easier to earn their emotional buy-in and loyalty.

How Paycor Helps

Benefits, Compensation Planning, Payroll, Pulse,
Paycor Wallet, Recognition, Analytics, Scheduling,
Team Insights Dashboard





HOW TO RETAIN



Stay relevant with comp & benefits.

We just said money isn't everything, and it's not. But it is important, and so are benefits. Think of an employee's total compensation as a car that requires maintenance every 7,000 miles or so. If your company hasn't evaluated pay and benefits in a few years, chances are you're not keeping pace with the market. A well-researched, well-reasoned, transparent pay philosophy is table stakes for earning employees' trust. Data shows that pay transparency reduces intent to quit by 30% (*SHRM, 2023*). And when employees feel they're being paid fairly, they're 54% more likely to want to stay (*Great Place to Work, 2025*). **Bottom line: competitive, transparent compensation is a powerful retention driver.**

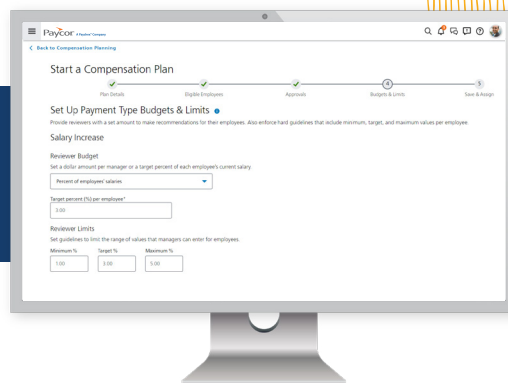
ACTION PLAN:

1. **Get into the habit of compensation benchmarking.** Whether you rely on HR software, hire a 3rd party, or do it yourself, benchmark pay against competitors of similar size and revenue base to keep current with industry standards. Anchor your pay philosophy in objective, timely data.
2. **Ensure leaders at all levels understand your company's pay philosophy.** Some employees think they can find all they need to know about fair pay online (they can't). Internet research will give them a general sense of what a particular job pays, but it won't tell them why your company is paying X for Y at this moment in time.
3. **Take a closer look at benefits.** If your offering hasn't changed since 2020, it's almost certainly out of touch. Benefits that address the urgent, real-life needs of your employee base send the message to current and future workers that your company understands their needs. And don't be afraid to ask for their input. Use anonymous employee surveys to learn about their preferences and share the results in a town hall meeting. Invite them into the process so that when you roll out new benefits, they can see their voices were heard.

How Paycor Helps



Benefits, Compensation Planning, Payroll, Pulse, Paycor Wallet, Recognition, Analytics, Scheduling, Team Insights Dashboard





HOW TO RETAIN



Create a culture of recognition

When you make people feel appreciated for a job well done, you can transform their relationship to work. The opposite is also true. When a worker pours their heart and soul into a project and no one notices, they'll stop putting in the effort. The impact is measurable: turnover is 31% lower among well-recognized employees (*Deloitte, 2023*). And these initiatives don't have to be expensive or time-consuming. **Give employees the tools to recognize each other, and you'll create a self-sustaining culture of gratitude.**

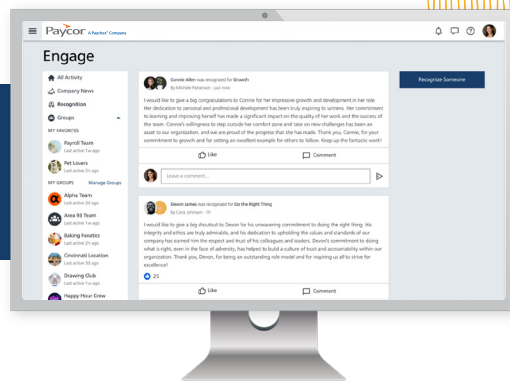
ACTION PLAN:

- 1. Start at the top.** To instigate cultural change, leaders need to model the desired behavior. Encourage leaders to recognize team members at company meetings or via email. Just remember, not everyone will want to be recognized in the same way. An introvert might appreciate a thoughtful handwritten note. An extrovert might prefer a standing ovation.
- 2. Enable peer-to-peer recognition.** Recognition becomes joyful (and sustainable) when the whole organization chimes in. You might start small by encouraging employees to write notes of appreciation on a whiteboard, or by sending a weekly email newsletter with shout-outs to individual team members.
- 3. Take recognition to the next level.** HR software makes it easy for team members to recognize each other publicly. Look for a solution that alerts managers when their direct reports get recognized and rewards employees with points they can redeem on a rewards website.

How Paycor Helps



Benefits, Compensation Planning, Payroll, Pulse, Paycor Wallet, Recognition, Analytics, Scheduling, Team Insights Dashboard





NEW MANAGER TRAINING CHECKLIST

Use this checklist to onboard new managers, whether they're new to leadership or just new to your team. Strong manager training reduces turnover, improves team performance, and builds your leadership pipeline.

Week 0: Preboarding

- ☐ Clarify role expectations. What does success look like in the first 90 days?
- ☐ Assign an experienced manager mentor.
- ☐ Prepare their team. Communicate the details about the transition in a positive way.

Week 1: Foundations

Understanding the Manager Role

- ☐ Define the difference between individual contributor and manager responsibilities.
- ☐ Review company leadership principles and management philosophy.
- ☐ Discuss how their success will be measured (team performance, not just individual output).
- ☐ Set expectations for time allocation (people development vs. technical work).

Getting to Know the Team

- ☐ Schedule 1:1s with each direct report in the first week.
- ☐ Review team members' goals, strengths, and development areas.
- ☐ Understand team dynamics, working relationships, and any ongoing challenges.
- ☐ Learn about each person's communication preferences and working style.

Systems & Tools Training

- ☐ Access to HRIS/HCM platform and reporting tools.
- ☐ How to run payroll, approve time off, and handle scheduling.
- ☐ Performance management system walkthrough.
- ☐ Expense approval and budget management processes.



NEW MANAGER TRAINING CHECKLIST

Month 1: Core Management Skills

Leading Effective 1:1s

- ☐ Train on 1:1 structure, frequency, and conversation topics.
- ☐ Practice active listening and asking open-ended questions.
- ☐ Review documentation best practices.
- ☐ Shadow an experienced manager's meeting with their direct report.

Giving Feedback

- ☐ Learn the difference between coaching, feedback, and performance management.
- ☐ Practice delivering constructive feedback in a tactful, actionable way.
- ☐ Understand how to recognize and reinforce good work.
- ☐ Role-play difficult conversations with a mentor or HR leader.

Delegation Basics

- ☐ Identify which tasks to keep vs. delegate.
- ☐ Learn how to match tasks to each team member's skills and development goals.
- ☐ Practice clear delegation (outcome, deadline, check-in points).
- ☐ Understand how to follow up without micromanaging.

Month 2: Building Team Performance

Goal Setting & Accountability

- ☐ Learn how to set SMART goals with direct reports.
- ☐ Understand how to connect individual goals to team/company objectives.
- ☐ Practice tracking progress and holding team members accountable.

Managing Team Dynamics

- ☐ Identify signs of healthy vs. unhealthy team dynamics.
- ☐ Learn conflict resolution techniques.
- ☐ Practice facilitating productive team meetings.
- ☐ Understand when to intervene in peer conflicts.



NEW MANAGER TRAINING CHECKLIST

Time & Priority Management

- ☐ Learn to identify and remove roadblocks for the team.
- ☐ Practice saying no and setting boundaries.
- ☐ Understand how to protect the team from unnecessary distractions.
- ☐ Review tools and systems for tracking team workload.

Month 3: Navigating Complexity

Difficult Conversations

- ☐ Practice delivering performance improvement plans.
- ☐ Learn how to handle emotional reactions professionally.
- ☐ Understand when to involve HR in difficult situations.

Employee Development

- ☐ Learn how to identify high performers and development opportunities.
- ☐ Create individual development plans with direct reports.
- ☐ Understand promotion processes and criteria.
- ☐ Discuss stretch assignments and skill-building opportunities.

Legal & Compliance Essentials

- ☐ Review harassment and discrimination policies.
- ☐ Understand FMLA, ADA, and other employment laws basics.
- ☐ Learn documentation requirements for HR/legal issues.
- ☐ Know when to escalate concerns to HR or leadership.



NEW MANAGER TRAINING CHECKLIST

Ongoing Development (Months 4-12)

Strategic Thinking

- ☐ Learn how to translate company strategy into team priorities.
- ☐ Practice workforce planning and succession planning basics.
- ☐ Understand how to build business cases for headcount or resources.
- ☐ Connect team metrics to business outcomes.

Hiring & Onboarding

- ☐ Train on interview best practices and legal considerations.
- ☐ Learn how to write effective job descriptions.
- ☐ Practice structured interviewing and candidate evaluation.
- ☐ Understand how to onboard new team members.

Leading Through Change

- ☐ Learn how to communicate change transparently.
- ☐ Practice addressing team concerns and resistance.
- ☐ Understand your role in change management.
- ☐ Develop skills for maintaining morale during uncertainty.

Budget & Resource Management

- ☐ Review budget planning and forecasting.
- ☐ Learn how to justify and request resources.
- ☐ Understand financial metrics relevant to your team.
- ☐ Practice making data-driven resource allocation decisions.
- ☐ Maintain an understanding of the company's compensation strategy.



NEW MANAGER TRAINING CHECKLIST

Checkpoint Conversations

- ☐ Schedule these with HR and their manager throughout the first year.
- ☐ 30 days: How's the transition going? What support do you need?
- ☐ 60 days: Review early wins and challenges. Adjust the training plan if needed.
- ☐ 90 days: Assess core competencies. Are they ready for more complex scenarios?
- ☐ 6 months: Discuss team performance trends. What's working? What needs attention?
- ☐ 12 months: Reflect on growth and identify new development opportunities.

Signs a New Manager Is Succeeding

- ☒ Team members feel heard and supported.
- ☒ Direct reports understand their goals and how they contribute.
- ☒ Performance issues are addressed early and well-documented.
- ☒ The manager asks for help when they need it.
- ☒ Team engagement and retention remain stable or improve.



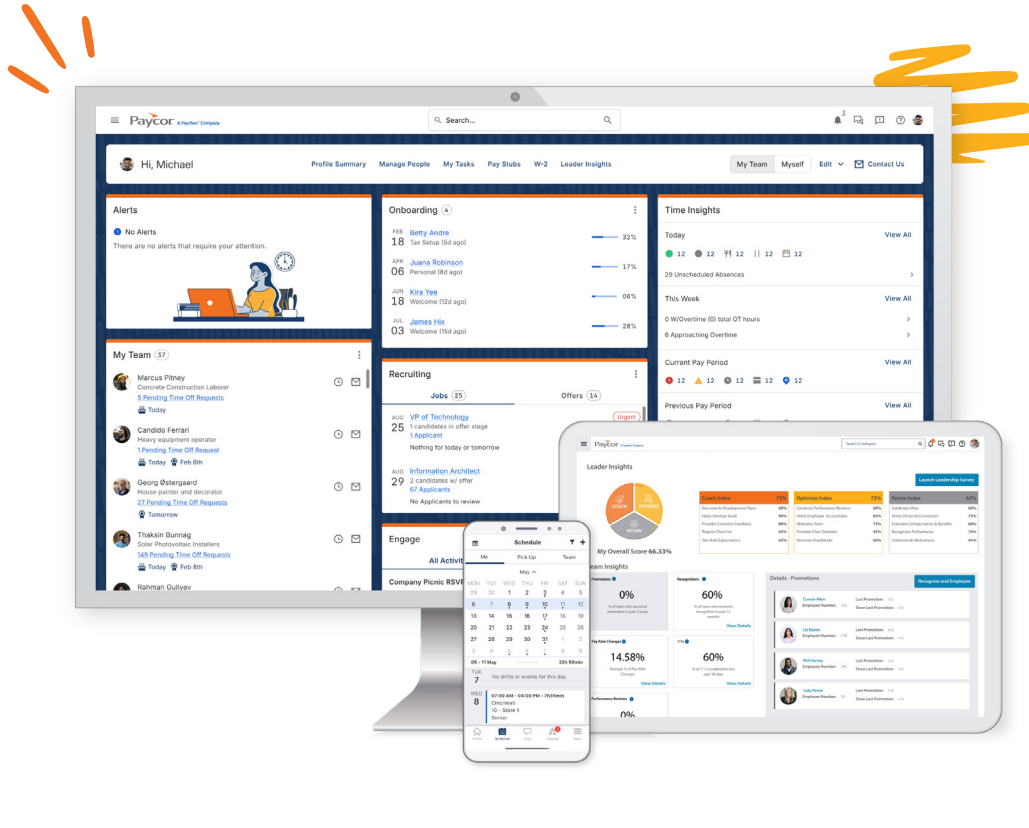
Retention Resources

Favorite Things Spreadsheet Template

Create a shared spreadsheet to learn about employees' recognition preferences. Then, when it's time to celebrate them, you'll know exactly how to make each person feel valued.

Name	Way to be Recognized	Birthday	Color	Candy	Food Snack	Coffee Order	Restaurant	Sports Team	Hobby
Ex. Holly Jones	Public shout-outs or DoorDash gift cards	June 15	Green	Skittles	Ritz	Dirty chai	Chipotle	Go Red Legs! Who Dey!	Hiking





The Paycor Advantage

Paycor, a Paychex company, connects leaders to people, data, and expertise. We help leaders drive engagement and retention by giving them tools to coach, develop, and grow employees. We give them unprecedented insights into their operational data with a unified HCM experience that can seamlessly connect to other mission-critical technology. And by providing expert guidance and consultation, we help them achieve business results and become an extension of their teams.



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