

Orientation & Onboarding Guide Template

Welcome to Our Company!

Created: _____

Revised: _____

NEW TEAM MEMBER NAME

DATE | ROLE / POSITION

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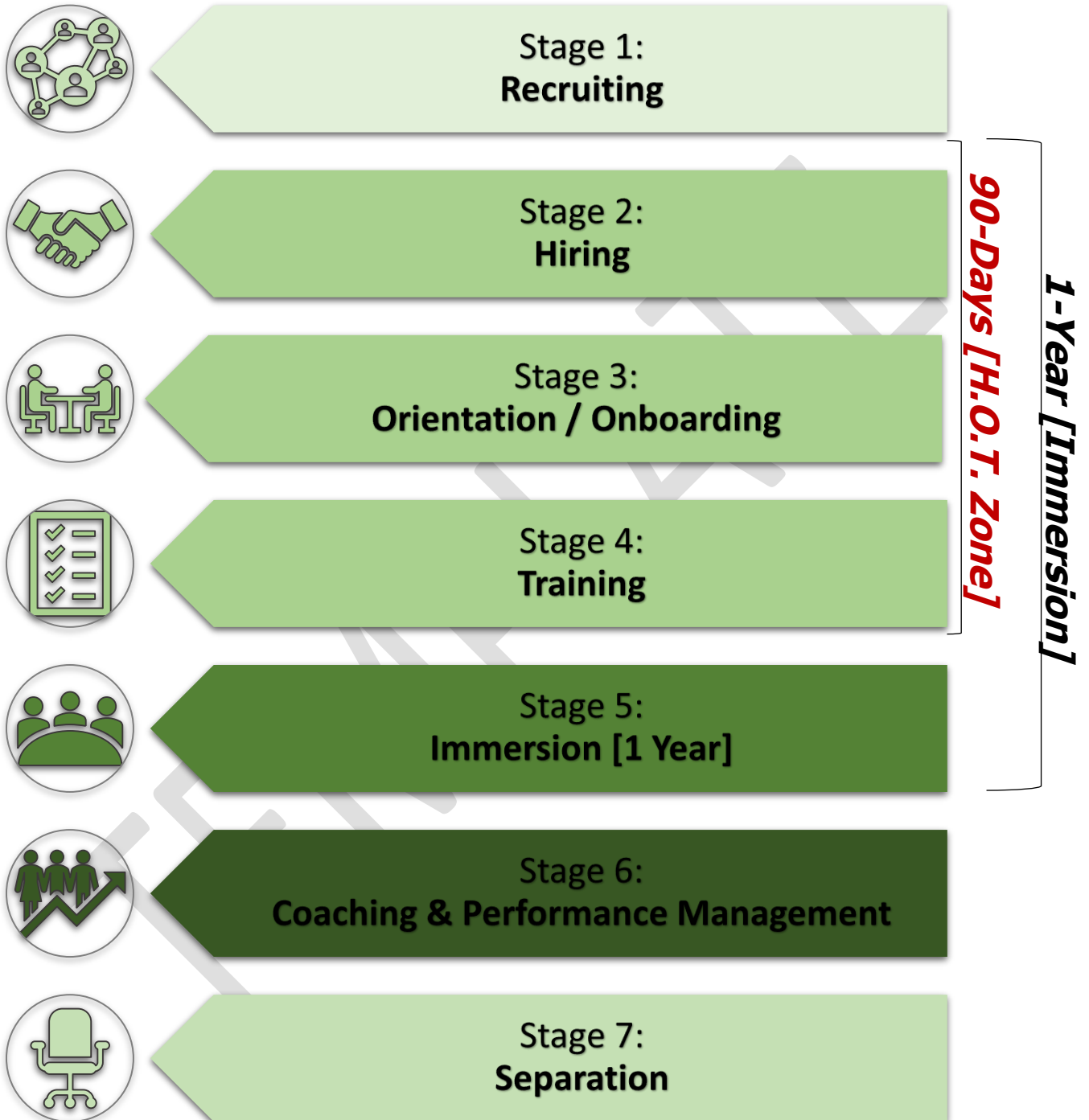
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Welcome to Our Company

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TEMPLATE

Team Member Experience Path

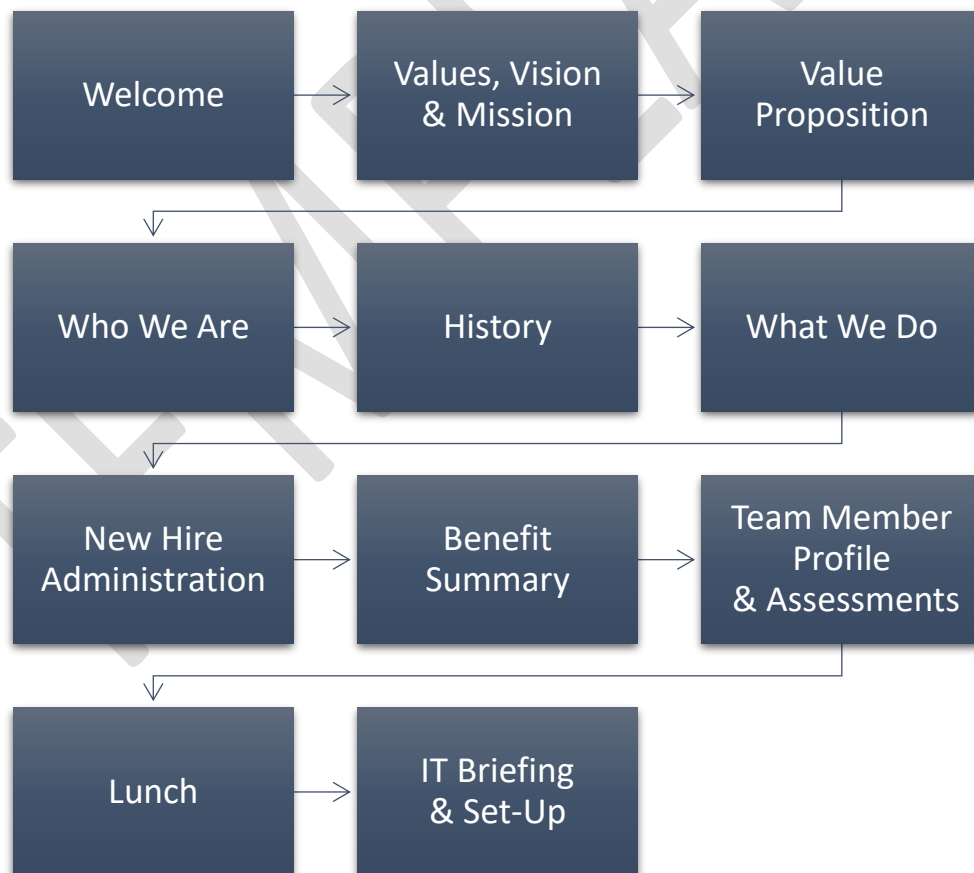


What to Expect Day 1

*"If you don't know where you're going,
you'll end up someplace else."*

– Yogi Berra

Here's what you'll experience:



Orientation Roles & Responsibilities



New Team Member - The New Team Member is a new Company employee that reports to a Leader Manager / Supervisor. The New Team Member will also engage with the Company Human Resources Manager for additional follow-up and check-ins.

The New Team Member is responsible for:

- Asking questions and requesting help when needed.
- Staying on track with all performance and development plans.
- Being eager to learn and displaying a coachable attitude.
- Receiving opportunities for improvement in good spirit.
- Participating in company activities.
- Following the onboarding process and completing all New Team Member activities.



Leader Manager / Supervisor - The Leader Manager / Supervisor is responsible for the day-to-day oversight of the New Team Member's performance and development throughout his or her employment.

The Leader Manager / Supervisor is responsible for:

- Working with the Human Resources Manager to personalize and monitor the onboarding process for the New Team Member.
- Providing an orientation to the job position and the particulars of the organization.
- Creating performance and development plans with the New Team Member.
- Coaching and mentoring the New Team Member in their new job position.
- Coordinating with the Human Resources Manager on lunches, events, and check-ins with the New Team Member.
- Ensuring all mandatory training and onboarding activities for the New Team Member are complete.
- Following the onboarding process and completing all Leader Manager activities.



Human Resources Manager - The Human Resources Manager is responsible for supporting the New Team Member and Leader Manager / Supervisor by ensuring all tools and resources necessary are provided. The Human Resources Manager also ensures that appropriate checklists and trainings are completed and establishes check-ins with both the Leader Manager / Supervisor and New Team Member.

The Human Resources Manager is responsible for:

- Helping to familiarize the New Team Member with Company guidelines, norms, and culture.
- Being available to answer questions and provide direction to resources.
- Supporting the learning of job-specific tasks, if and when possible.
- Acting as an informational resource on policies, processes, and procedures.
- Coordinating with the Leader Manager / Supervisor on lunches, events, and check-ins with the New Team Member.
- Following the onboarding process and completing all Human Resources Manager activities.
- Ensuring that the New Team Member's Orientation & Onboarding is completed within 4-6 weeks of Start Date and / or provide additional time and resources to ensure completion.

Orientation & Onboarding Overview

Area of Focus #1:

Organizational Overview

1. *Who We Are*
2. *What We Do*
3. *Who We Serve*
4. *Business Partner Overview*

Area of Focus #2:

Role Overview

1. Team Member Experience Path
2. Leader Manager
3. Direct Reports
4. Committees
5. On-Going Meetings
6. Core Responsibilities
7. Training Schedule
8. Additional Information

Organizational Overview

AREA OF FOCUS #1

Who We Are

-
- ✓ Values, Vision & Mission
 - ✓ Value Proposition
 - ✓ History of Organization
 - ✓ Board of Directors
 - ✓ President
 - ✓ Management Team
 - ✓ Organizational Chart (See handout)

What We Do

- ✓ _____
- ✓ _____
- ✓ _____
- ✓ _____
- ✓ _____
- ✓ _____

Who We Serve

-
- ✓ _____
 - ✓ _____
 - ✓ _____
 - ✓ _____
 - ✓ _____
 - ✓ _____

Business Partner Overview

-
- ✓ Professional Partners
 - ✓ Communication & Training Partners
 - ✓ Memberships
 - ✓ Community & Service Organizations

Values, Vision & Mission (Our DNA!)

AREA OF FOCUS #1

[Insert Here]

TEMPLATE

Value Proposition

AREA OF FOCUS #1

[Insert Here]

TEMPLATE

History of the Organization

AREA OF FOCUS #1

[Insert Here]

TEMPLATE

Board of Directors, President & Management Team

AREA OF FOCUS #1

[Insert Here]

TEMPLATE

What We Do

AREA OF FOCUS #1

[Insert Here]

TEMPLATE

Client Overview

AREA OF FOCUS #1

[Insert Here]

TEMPLATE

Business Partner Overview

AREA OF FOCUS #1

[Insert Here]

TEMPLATE

Role Overview

AREA OF FOCUS #2

Date of Hire:

Leader Manager:

Department:

Team Members (Names & Roles):

Direct Reports:

Committees:

On-Going Meetings:

TEMPLATE

Core Responsibilities

AREA OF FOCUS #2

Leader Manager / Supervisor and Human Resources Manager will collaborate to identify 5 Core Areas of Responsibility based upon the New Team Member’s Role (Team Member Profile/Description) to expand upon during the Onboarding & Training Process. Using the Chart below, identify specific training tasks, who will train or communicate the process to the New Team Member, an anticipated end date, and upon completion, list the “completed by” date.

1. _____
2. _____
3. _____
4. _____
5. _____

Core Responsibility # 1: _____

Task	Team Member Assignment	Anticipated End Date	Completed By
Example: Train New Team Member on “_____”	Supervisor		

Orientation Schedule Sample

AREA OF FOCUS #2

Meetings to Consider for Initial Orientation Schedule:

- ✓ Lunch or Breakfast with Supervisor on Second Day or first available date
- ✓ First Week – Daily End-of-Day Check-Ins with Supervisor
- ✓ Weeks 2-8 consider End-of-Week Wrap-Up Meeting / Check-In with Supervisor
- ✓ 30-60-90 Day, Quarterly and Annual Check-In with Human Resources Manager
- ✓ Consider if New Team Member should meet with:
 - Founders
 - President
 - Management Team
 - Department Heads
 - Other
- ✓ On-Going Departmental Meetings / Talking Point Meetings
- ✓ “Application Time” of 20-30 minutes 2-3X a week for the first 3-4 weeks to review technology, tools and resources (i.e. phone, check email, review calendar, etc.,)

Orientation Schedule Sample Continued...

AREA OF FOCUS #2

Week #1

Date	Time	Subject	Attendees	Location
Monday, May 20	8:00 A.M. – 12:00 P.M.	•		
	12:00-1:00 P.M.	•		
	1:00-4:30 P.M.	•		
	4:30-5:00 P.M.	•		
Tuesday, May 21	8:00 A.M. – 10:00 A.M.	•		
	10:00 A.M. – 12:00 P.M.	•		
	12:00-1:00 P.M.	•		
	1:00-2:00 P.M.	•		
	2:00-2:30 P.M.	•		
	2:30-4:30 P.M.	•		
	4:30-5:00 P.M.	•		
	Wednesday, May 22	8:00 A.M. – 4:30 P.M.	•	
12:00-1:00 P.M.	•			
4:30-5:00 P.M.	•			
Thursday, May 23	8:00-9:00 A.M.	•		
	9:00 – 10:00 A.M.	•		
	10:00 A.M. – 12:00 P.M.	•		
	12:00-1:00 P.M.	•		
	12:30-2:30 P.M.	•		
	3:30-5:00 P.M.	•		
Friday, May 24	8:00 A.M. – 4:30 P.M.	•		
	12:00-1:00 P.M.	•		
	4:30-5:00 P.M.	•		

Orientation Schedule Sample Continued...

AREA OF FOCUS #2

Week #2

Date	Time	Subject	Attendees	Location
Monday, May 27		OFFICE CLOSED – MEMORIAL DAY		
Tuesday, May 28	8:00 A.M. – 12:00 P.M.		•	
	12:00-1:00 P.M.		•	
	12:30-5:00 P.M.		•	
Wednesday, May 29	8:00 – 10:00 A.M.		•	
	10:00 A.M. – 12:00 P.M.		•	
	12:00-1:00 P.M.		•	
	1:00-5:00 P.M.		•	
Thursday, May 30	8:00 – 10:00 A.M.		•	
	10:00 A.M. – 12:00 P.M.		•	
	12:00-1:00 P.M.		•	
	1:00-5:00 P.M.		•	
Friday, May 31	8:00 – 10:00 A.M.		•	
	10:00 A.M. – 12:00 P.M.		•	
	12:00-1:00 P.M.		•	
	12:30-5:00 P.M.		•	

Orientation Schedule Sample Continued...

AREA OF FOCUS #2

Week #3

Date	Time	Subject	Attendees	Location
Monday, June 3	8:00 A.M. – 5:00 P.M.	•		
	12:00-12:30 P.M.	•		
Tuesday, June 4	8:00 A.M. – 5:00 P.M.	•		
	12:00-12:30 P.M.	•		
Wednesday, June 5	8:00 A.M. – 5:00 P.M.	•		
	12:00-12:30 P.M.	•		
Thursday, June 6	8:00 A.M. – 5:00 P.M.	•		
	12:00-12:30 P.M.	•		
Friday, June 7	8:00 A.M. – 5:00 P.M.	•		
	12:00-12:30 P.M.	•		

Orientation Schedule Sample Continued...

AREA OF FOCUS #2

Week #4

Date	Time	Subject	Attendees	Location
Monday, June 10	7:00 A.M. – 12:00 P.M.	•		
	12:00-12:30 P.M.	•		
	12:30-5:00 P.M.	•		
Tuesday, June 11	7:00 – 8:30 A.M.	•		
	8:30-10:00 A.M.	•		
	10:00 A.M. – 12:00 P.M.	•		
	12:00-12:30 P.M.	•		
	12:30-5:00 P.M.	•		
Wednesday, June 12	8:00-9:30 A.M.	•		
		•		
		•		
		•		
Thursday, June 13		•		
		•		
		•		
		•		
Friday, June 14		•		
		•		
		•		
		•		
		•		

Sample Additional Information

- Current Year Payroll Dates
- Holidays

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