



Welcome to our New Employee Onboarding Template, a carefully crafted blueprint to help you orchestrate an engaging and thorough orientation experience for your new hires. This template is designed to encompass the key milestones of the onboarding journey—from the initial preparations to the crucial first day, through to the first week, and extending to the end of the third month. However, please note that while our template aims to be universally applicable, it may require customization to align with the unique requirements of individual roles and the specific nuances of different industries. We encourage you to adapt and modify the provided structure to best fit the needs of each new member joining your organization.

## **For Employee:**

### **Learning Goals:**

#### **30 days:**

- Gain a comprehensive understanding of the company's mission and values.
- Acquire necessary information and resources to effectively contribute and add value to your team.
- Clarify expectations from your employer and identify ways to bring value to your role.

#### **60 days:**

- Apply the skills and knowledge acquired in the past 30 days to deliver value that aligns with company goals.
- Familiarize yourself with and effectively use relevant systems or tools for tracking progress and meeting goals.

#### **90 days:**

- Learn how to develop and present a personalized plan to achieve your objectives.
- Review previous professional development sessions to enhance your own growth and development.

### **Learning Actions:**

#### **30 days:**

- Independently study and discuss the company's mission with management to gain a deep understanding.
- Clearly define your daily responsibilities and expectations.
- Familiarize yourself with the company's clients and products by reviewing available information.

#### **60 days:**

- Engage in a meeting with a senior team member to gain insights into relevant procedures or systems.
- Familiarize yourself with the applicable systems and tools and learn how to utilize them effectively.

#### **90 days:**

- Utilize the knowledge and skills obtained in the previous 60 days to develop and present a personal plan.
- Take the initiative to lead a professional development session for fellow team members.

## **Performance Goals:**

### **30 days:**

- Attend at least three meetings relevant to your role to become more familiar with the operations and objectives.
- Participate in activities that enhance your operational understanding. Independently complete a minimum number of assigned tasks.

### **60 days:**

- Successfully complete a project or task assigned to you, showcasing your ability to contribute to the team's goals.
- Demonstrate ability to apply relevant skills and knowledge to generate positive outcomes.
- Identify and implement strategies that optimize efficiency and effectiveness in your role.

### **90 days:**

- Independently accomplish a significant task or project that contributes to the overall objectives of your team.
- Demonstrate the ability to think critically and problem solve to overcome challenges.
- Proactively identify opportunities to improve processes and suggest innovative ideas.

## **Performance Actions:**

### **30 days:**

- Seek opportunities to observe and learn from colleagues to gain a better understanding of team dynamics and processes.
- Engage in discussions with key team members to broaden your knowledge base and gain insights into the organization.

### **60 days:**

- Take the initiative to collaborate with team members on a specific project or task, showcasing your ability to work effectively as part of a team.
- Actively seek feedback and implement suggestions to improve your performance.

### **90 days:**

- Take the lead in organizing and conducting a team meeting or presentation to contribute to the overall goals and objectives.
- Actively seek opportunities to mentor or assist colleagues in their professional development.

## **Personal Goals:**

### **30 days:**

- Establish positive relationships with at least two coworkers.
- Arrange a networking or professional development activity to foster learning and collaboration.

### **60 days:**

- Foster a positive relationship with at least one colleague or supervisor.
- Set specific personal development goals to enhance your skills or competencies related to your role.

**90 days:**

- Take the lead in organizing and facilitating team-building activities to strengthen working relationships and collaboration.

**Personal Actions:****30 days:**

- Initiate conversations and engage in social interactions with immediate coworkers to build positive working relationships and establish a support network.
- Organize a team building or knowledge-sharing activity to foster learning and collaboration.

**60 days:**

- Schedule a meeting with a colleague or supervisor to discuss your professional development goals and map out a plan for growth.

**90 days:**

- Demonstrate leadership skills by coordinating and leading a team-based project or activity that contributes to the overall objectives of the team.

**For Employer:****BEFORE THE START DATE**

- Verify commencement date and time with a confirmation call
- Talk over any relocation requirements
- Clarify attire expectations
- Share a link to the onboarding resource page for the company or department
- Assemble a welcome package
- Ensure all hiring documents and background checks are complete and received
- Confirm that the offer letter has been received and accepted
- Arrange the workspace or area
- Order security access card and identification badge
- Set up email account and telephone service
- Procure any necessary computer hardware, software, and accessories
- Register the new employee for HR orientation and introductory sessions
- Plan any relevant training workshops

**ON THE FIRST DAY**

- Greet the new employee upon arrival and show them to their workspace
- Hand over and go through the welcome package
- Discuss policies regarding breaks and meals
- Introduce a buddy or point of contact within the company
- Check that all access cards are received and working
- Coordinate with HR to finalize any outstanding documents
- Walkthrough the use of the company portal
- Ensure the signing of the offer letter
- Explain the setup and use of provided technology and peripherals

- Confirm that the telephone and email systems are operational
- Go over policies for the use of technology
- Help with adding the new starter to the online directory
- Introduce them to other team members
- Offer or plan a guided tour of the facility

### **DURING THE FIRST WEEK**

- Check in to see how their first week is going
- Aid with any queries
- Reiterate the training schedule
- Double-check that all technology is functioning correctly
- Discuss the organizational culture and working practices
- Talk about ongoing work, routine tasks, and projects
- Explain the company's mission, vision, and policies

### **DURING THE FIRST MONTH**

- Determine if regular (weekly or bi-weekly) check-in meetings are necessary
- Remain available to address queries
- Establish both immediate and long-term objectives

### **DURING THE FIRST THREE MONTHS**

- Conduct a performance appraisal
- Reevaluate both immediate and long-term goals
- Maintain an open door for any further inquiries