

Onboarding and Orientation Plan Sample

Name	
Job Title	
Start Date	
Schedule	
Supervisor Name	

Welcome to the team! We are so excited to have you join us. In your first two weeks, you will meet your supervisor(s), be oriented to our digital tools, materials, working methods, regular meetings, etc. and will focus on settling into your new role.

Things to Know	Details
Technology	You will be using the following technology:
Supervisor Contact Information	I will be in meetings during _____, but you can reach me at _____ if you have any questions.
Team Contact Information	Name, Job Title, Email Address Name, Job Title, Email Address Name, Job Title, Email Address
Policies	We have the following department-wide policies that you should know about: <i>For example, "We have a "No meetings Friday policy" that we do our best to stick to. If you do not have your Friday booked off for no meetings, please feel free to put that in. While there will be times that we might need to break that, our team tries our best to respect it."</i>

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Onboarding Journey

Month	Goals	Resources
1 -2	<p>The following goals/deliverables will be prioritized during your first two months.</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> • <i>Have the new hire become familiar with organizational policies and processes</i> • <i>Have the new hire identify 3 goals they would like to accomplish during their term with you as the employer</i> • <i>Have the new hire meet 1-on-1 and in a group with all team members</i> • <i>Have the new hire build confidence using company tools and applications to retrieve/update information</i> • <i>Review workstation/environment set up and any modifications that may be needed</i> • <i>Reflect and showcase your commitment to encouraging and celebrating equity, diversity, and inclusion</i> • <i>If the new hire will be working evening or non-standard hours, consider safety implications and provide resources to assist</i> • <i>Create a sense of belonging for the new hire</i> 	<p>These resources will support your transition into the role and organization.</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> • <i>Provide links to internal shared documents i.e. HR paperwork; eLearning modules for required training; etc.)</i> • <i>Provide contact list (full contact information) for colleagues that the new hire will be working with</i> • <i>Provide an organizational chart to help them navigate the various contacts they may work with</i> • <i>Provide resources for ergonomic and/or accessible workstations</i> • <i>Share a calendar of important cultural dates; incorporate your own organizational events/significant dates; share where your EDIA resources (internally or externally) are located</i> • <i>Share contact information for HR/other colleagues</i> • <i>For evening/non-standard shifts, consider health and safety supports: ensure another staff member is on-site; provide on-call support numbers; provide taxi "tokens" to get home safely, etc.</i> • <i>If your employee identifies with an equity-deserving group, create networking opportunities or cross-department opportunities for new hires to connect with members identifying with the same and/or additional equity-deserving groups</i>

3-4	<p>The following goals/deliverables will be prioritized during months three and four.</p> <p><i>After the initial training period is over, assess how the new hire is performing routine tasks. Consider incorporating additional tasks/projects and/or increasing the complexity of the tasks they're working on.</i></p>	<p>These resources will support your ongoing learning within the organization.</p> <p><i>Provide additional context behind company processes or decisions, now that the new hire hopefully has a grasp of company/industry jargon and may have a foundational understanding of different units within the company, as well as operational needs.</i></p>
5-6	<p>The following goals/deliverables will be prioritized during months five and six:</p> <p><i>At the midpoint of the work term with you, schedule a meeting to discuss how the employee is doing; share feedback on successes and strengths, areas for improvement, learning, and stretching, and discuss positive impacts of their contributions. Revisit original goals and set additional goals as appropriate.</i></p>	<p>Provide the following resources to support their ongoing learning within the organization:</p> <p><i>Depending on their additional goals and the new hire's capacity to take on new challenges, introduce them to new colleagues outside of their department or unit</i></p>
7-12	<p>The following goals/deliverables will be prioritized during months seven to twelve:</p> <p><i>After the midpoint, the new hire should be contributing similarly to a full-time employee and have full autonomy to complete tasks and projects as assigned (taking the initiative to clarify expectations as needed; consulting other colleagues as required; researching options and providing recommendations for continuous improvement).</i></p>	<p>Provide the following resources to support their ongoing learning within the organization:</p> <p><i>Provide any additional resources or invite to management meetings to allow further insight and scope into both the operational and strategic approaches within the organization. Provide your hire with opportunities to present updates and highlights at team meetings and beyond, connecting them to other units as appropriate.</i></p> <p><i>Schedule a feedback meeting and exit interview at the end of a contract or at an employee departure. Consider asking your employee to present their goals and contributions during the work term to senior leaders. Discuss future employment opportunities/goals.</i></p>

Training, & Orientation Plan

Weekly Checklist

Week #	1
Purpose	Welcome to the Team Organization and Team Knowledge
Schedule	
Monday 9 am to 5 pm 1 hour lunch (unpaid) 2x 15 min breaks, paid	Insert new hire's schedule for the day here (including time to review company policies and procedures, read transition documents, review company resources, set-up their desk and build familiarity with online software, meetings you have scheduled for them, etc.)
Tuesday 9 am to 5 pm	Insert new hire's schedule for the day here
Wednesday 9 am to 5 pm	Insert new hire's schedule for the day here
Thursday 9 am to 5 pm	Insert new hire's schedule for the day here
Friday 9 am to 5 pm	Insert new hire's schedule for the day here

Week #	2
Purpose	Introduction to Role Job Shadowing/Role-Specific Training
Schedule	
Monday 9 am to 5 pm	Insert new hire's schedule for the day here
Tuesday 9 am to 5 pm	Insert new hire's schedule for the day here
Wednesday 9 am to 5 pm	Insert new hire's schedule for the day here
Thursday 9 am to 5 pm	Insert new hire's schedule for the day here
Friday 9 am to 5 pm	Insert new hire's schedule for the day here

Continue with additional weeks.

Orientation usually occurs within the first 2-3 weeks, but effective onboarding can take as long as 6-8 months.