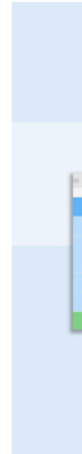




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ONBOARDING PLAN TEMPLATE

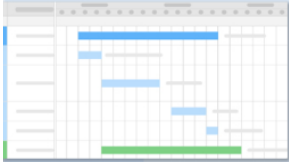
PROCESS MONITOR / MENTOR	PREPARATION
	UPON HIRE DECISION
MANAGER	Create new hire schedule
	Designate coworker / peer resource
	Discuss relocation, if applicable
	Identify HR point of contact
OFFICE ADMINISTRATOR	Submit technology requests
	Order passkeys, IDs, etc.
	Create personnel file

HUMAN RESOURCES	
TECHNOLOGY	
DESIGNATED COWORKER / PEER RESOURCE	
DEPARTMENT LEAD (if applicable)	

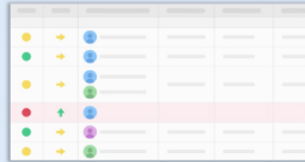


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Project Timeline



Task List



Project Board



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DATE

LABORATORY	ORIENTATION
PRIOR TO START DATE	FIRST DAY(S)
Add/invite to existing meetings	Welcome upon arrival
Call to confirm start date and time	Guide to work station / office
Create welcome packet	Deliver prepared welcome packet
Inform department, HR, and IT	Discuss break / meal policies
Schedule any pertinent training	Discuss trial period, if applicable
	Introduce to designated peer resource
	Confirm receipt/functionality of passkeys
Secure work area / station	Provide company structure sheet
Designate space	Provide company contact list access
Furniture, supplies, etc.	Provide any maps, parking passes, etc.
Phone installation and setup	
Obtain nameplate, business cards, etc.	
Confirm receipt of all recruitment docs	Connect to complete any paperwork
Confirm offer letter receipt/acceptance	Review portal
Confirm background check completion	Sign offer letter, if necessary

Communicate business practices	Enroll in any benefits / services
Communicate business policies	Discuss company culture and work style
Enroll in new hire briefing, webinar, etc.	
Passkey order form	Review software, hardware, printers, etc.
Temporary access for contract new hire	Confirm email setup
Software acquisition	Confirm phone setup
Print driver setup	Review tech acceptable use policies
Mobile device, if applicable	Assist with online directory setup
Hardware setup	
Network setup	
	Conduct tours
	Answer any questions
	Offer to take to lunch
	Make peer introductions



TATION	
FIRST WEEK(S)	END OF FIRST THREE MONTHS
Ask how first weeks went	Assess progress
Assist with any questions	Make any further introductions
Review training schedule	Identify and address learning needs
Review all technology functionality	Make any responsibility adjustments
Touch base with peer resource	Introduce increasingly complex projects
Discuss current projects	
Review company mission statement	
Identify and address learning needs	
Review company policies	
Ask employee how first weeks went	
Ask manager how first weeks went	

INTEGRATION

END OF FIRST SIX MONTHS	END OF FIRST YEAR
Performance review	Performance review
Review short and long-term goals	Review short and long-term goals
Answer any questions	Answer any questions
	Performance review

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